Recommendation 2.
Track key quantitative and qualitative metrics and economic impact of tourism.

Key Objective
Provide data of strategic importance to stakeholders.

Context & Reasoning
Currently, there is a lack of Grey County specific tourism data, which makes it difficult to understand what the impact of the industry is on the County’s economy and overall development. Creating, updating and sharing a dashboard of data on the performance of the tourism industry should help private businesses plan for the future, and build stronger businesses. Furthermore, relevant data on the economic impact of tourism to the County should help make a better case to residents and other government bodies about the importance of the industry and justify prioritisation in funding and investment. Understanding the value of tourism critically informs marketing and product development, both for the public and private sector. Suggestions for measures to collect include: Length of stay, customers/year, Origin of customers, Full time/Part time employees, Percentage of revenue spent on payroll, Guest expenditure/day, Percentage of bookings done online, Top 3 places of origin.
QUESTION 11 – Community Engagement and Collaboration - “What should the County tourism officials be doing to improve/enhance overall engagement with the community and more specifically with the tourism stakeholders such as yourself?”
68 responses

“Number of visitors” (34%)
“Where are people coming from” (26%)
“What are they doing here” (25%)
“How they heard of Grey or is the marketing working?” (16%)
“Expenditures (dollars spent)” (15%)
“Age of visitor(s)” (12%)
“Ethnicity” and “Events Attended” (7% each)
“Satisfaction with visit” and “Website analytics/SEO (Search Engine Optimization)” (6% each)

Sample responses:

“Home location, reasons for visiting, demographics, the usual, but also their emotional response to the area, the activity, their satisfaction with the experience.”

“Economic impact of tourism at the county and regional level. Visitor demographics.”

“Need economic impact of tourism numbers. Perhaps research should focus on the tourism resources we have so that the tourism partners or private sector can develop new attractions, events or businesses/ accommodations.”

“Postal code data with party size and date when they visit. If you can find out what they did and other interests, that’s a bonus.”

Key Questions to move forward

What do you want to know? What do we know about tourism supply and demand?
What are the gaps? How can we work together to fill the gaps?
WHAT DO WE WANT TO KNOW?

RTO7
Grey County
DMOs
Destination Marketing Organizations
Municipalities
Public Attractions
Including Parks
Private Tourism
Businesses

SUPPLY

- Economic impact of tourism
  - Number of tourism jobs
  - Number of tourism businesses
  - Tax revenue
- Business trends (e.g. YTY)
- HST or other indicator

DEMAND

- Understand Visitor Trends
- Reliable, consistent input to Marketing/Business Plans
- Support for Existing/New Product & Experience Development
- Estimate Economic Value of Tourism

More Specifically:

SUPPLY

- Economic impact of tourism
  - Number of tourism jobs
  - Number of tourism businesses
  - Tax revenue
- Business trends (e.g. YTY)
- HST or other indicator

DEMAND

- Everything in Regional Tourism Profiles for...
  - Visitors to gated and ungated attractions & events
  - Visitors/VFR/residents/second home owners
  - New Canadians
- Visitor Satisfaction
- Trip Motivators
- Visitor Expenditures
- Forecasts
- How was the “season”? 

Timely & Reliable

Update – June 2018
WHAT WE KNOW ABOUT SUPPLY?

SUPPLY
- Economic impact of tourism
- Number of tourism jobs
- Number of tourism businesses
- Tax Revenue
- Business trends (e.g. YTY)
- HST or other indicator

Our Information Sources
- Grey County Tourism Operator Data Base
- OMAFRA Analyst

TOURISM BUSINESSES (709) & NATURAL AREAS (140)
Grey County database

<table>
<thead>
<tr>
<th>Category</th>
<th># Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;B</td>
<td>155</td>
</tr>
<tr>
<td>Campgrounds</td>
<td>3550</td>
</tr>
<tr>
<td>Hotel/Motel/Inn</td>
<td>1932</td>
</tr>
<tr>
<td>Vacation Rental</td>
<td>158</td>
</tr>
<tr>
<td>Total</td>
<td>5795</td>
</tr>
</tbody>
</table>

Update – June 2018
**WHAT WE KNOW ABOUT SUPPLY?**

TOURISM JOBS* compared to TOTAL JOBS - 2015
OMAFRA Analyst

![Graph showing comparison of tourism jobs and total jobs in 2015.](image)

- **2015 Total Jobs**: 45,209
- **2015 Tourism Industry* Jobs**: 5,948

13% Average for Grey County

*Tourism Industry as defined by Stats Canada

TOURISM* JOBS by Industry Sector – Grey County
OMAFRA Analyst

![Bar chart showing tourism jobs by industry sector in 2010 and 2015.](image)

**Trends**

- Significant Growth in tourism jobs 2010-15
- Youth, women and immigrants are more highly represented in tourism jobs in Ontario

*Tourism Industry as defined by Stats Canada

Update – June 2018
WHAT WE KNOW ABOUT DEMAND?

DEMAND

- Everything in Regional Tourism Profiles for...
  - Visitors to gated and ungated attractions & events
  - Visitors/VFR/residents/second home owners
  - New Canadians
- Visitor Satisfaction
- Trip Motivators
- Visitor Expenditures
- Forecasts
- How was the “season”?

Our Information Sources

- Grey County Tourism Annual Attractions/Events Survey
- Grey County Tourism Google Analytics - Inquiries
- OMTCS Regional Tourism Profiles (RTP)
- OMTCS Market Segmentation for Bruce Grey Simcoe
- PRIZM Market Segmentation (New Tool)
- Partner surveys/info centre stats

2013/17 Attendance Trends
20 Grey County Events & Attractions

- Over 580,000 attendees (don’t know proportion visitors)
- 12 increased and 8 decreased (*Holstein Rodeo did not run in 2016)

<table>
<thead>
<tr>
<th>No.</th>
<th>Number of Events &amp; Attractions</th>
<th>% Change 2013-17</th>
<th>Overall Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Decrease</td>
<td>Same</td>
<td>0-10%</td>
</tr>
<tr>
<td>Gated Events (counted)</td>
<td>4</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Non-Gated Events (estimated)</td>
<td>(8)7</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Attractions (counted)</td>
<td>9</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>20</td>
<td>8</td>
<td>1</td>
</tr>
</tbody>
</table>

4 Gated Events
- Centurion Cycling
- Summerfolk
- Concours D’Elegance
- Christmas in the Country

7 Non-Gated Events
- Apple Harvest Craft Show
- Elvis at Blue Doors Open
- Holstein Maplefest
- Festival of Northern Lights
- Salsa at Blue Salmon Spectacular
- *Holstein Rodeo (2015 only)

9 Gated Attractions
- Ecoadventure
- Le Scandinave
- Scenic Caves Nordic
- Inglis Falls - Grey Sauble CA
- Grey Roots Museum Plunge
- Tom Thomson Gallery
- Creemore PP - Day Use
- Scenic Caves Nature Adventures

Update – June 2018
WHAT WE KNOW ABOUT DEMAND

OMTCS 2013 RTP for Bruce Grey Simcoe

WHERE THEY COME FROM
- Ont: 97%
- US: 1%
- Cdn: 1%
- Overseas: 1%

WHEN THEY COME
- Same-day: 61%
- Over-night: 39%

WHY THEY COME
- Pleasure: 47%
- VFR: 39%
- Business: 6%
- Shopping: 3%

WHAT THEY DO
- $71 per person per same-day visit
- $173 per person per overnight stay

WHERE THEY STAY
- Private Homes: 41%
- Cottages: 28%
- Hotels/Motel/Resorts: 20%
- Camping/RV Facilities: 9%
- Other Roofed Commercial: 3%

TRAVEL PARTY
- 2.6 average party size
- 16???% with children

TOP ACTIVITIES BY SAME DAY VISITORS
- VFR
- Shopping
- Business Meeting
- Beach
- Sightseeing

TOP 10 OUTDOOR ACTIVITIES BY PERSON-VISITS
- Beach
- Hiking
- Boating
- Camping
- Skiing/Boarding
- Fishing
- Cycling
- Bird Watching
- Golfing
- Playing a sport

Source: MTCS, Regional Tourism Profiles (RTP) 2013, Percentages based on total person-visits

Update – June 2018
2015: 12,401,200 Total Person Visits ( * not including US visitors)
2014: 12,847,100 " " (Canada, US, Overseas)
2013: 12,581,900 " " " "

Update – June 2018
### How PRIZM works…

**Postal Code** → **PRIZM 5**

#### Demographics
- Age: 25 to 34
- 1 person households
- Non-family household
- Use public transit
- University degree
- Management occupation
- Single (never married)
- English mother tongue
- Apartment

#### Retail Behaviour
- Sporting Life
- Mastermind
- Grand and Toy
- Loblaw
- Holt Renfrew
- Talbots
- Sunglass Hut
- Black's
- Town Shoes
- Pharma Plus
- Lenscrafters
- SoftMoc
- Nine West
- Apple
- Pier 1 Imports

#### Sports and Leisure
- Opera
- Museums
- Art Galleries
- Live Theatre
- Foreign Movies
- Nightclubs/bars
- Pop Music Concerts
- Attend Pro Basketball
- Attend Pro Baseball
- Health/Fitness Club
- Downhill Skiing
- Canoeing
- Yoga/Pilates
- Tennis
- Ice Skating

#### Media Preferences
- Medium-Light Radio Listener
- Rock
- News/Talk/Information/Sports
- Oldies
- Light TV Viewer
- Sitcoms
- News/Current Affairs
- Heavy Reader of Daily Newspaper
- Finance/Business
- Real Estate/Homes
- Medium-Light Magazine
- News and Current Affairs
- Heavy Internet Use
- Buy Books Online

---

**U3 Urban Digerati**

Younger, well-educated city singles
How PRIZM works…

From 4,782 Postal Codes of Grey County’s 2015 Summer & Fall Social Media Campaign Inquirers, we learned… those who were interested in our offerings & those who were not!

Index – 56 (low)
HH – 292,000
Younger tech savvy singles in major urban centres
Active social lives – dancing, bar hopping, film festivals
NOT A FIT

Index – 192 (high)
HH – 434,000
Growing segment in exurban communities
Middle age couples & families
Great outdoors – fishing, boating, camping, snowmobiling – love their toys
Technology for a purpose

Index – 187 (high)
HH – 233,000
Affluent rural lifestyles
Middle age-older couples
Outdoor leisure activities - cottages, boats, golfing, pets
Traditional media – less inclined for mobile & SM
How can we use this insight?

- Help us make advertising and promotional decisions like... where to locate others like them and quantify the market size...

- After grouping our key target segments, we can look for areas that best match our targets.
- And... we can select appropriate media channels and better align our promotional messages to their social values such as ecological interests and how activities will conserve nature (Ecological Concern) and are practical, easy to do with good value (Aversion to Complexity)

IMagine... if we shared information about customers’ behaviour with their postal codes from a representative sample of Grey County tourism businesses. You could build your business by...

- Understanding collectively our key markets more deeply

- Better refine our offerings and better target our key markets
<table>
<thead>
<tr>
<th>Supply</th>
<th>Challenges - Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grey County Tourism Operator Database</td>
<td>Are supply side metrics relevant to businesses?</td>
</tr>
<tr>
<td>OMAFRA Analyst</td>
<td>Lots of discrepancy in definition of “Tourism Industry” and “Tourism Jobs”.</td>
</tr>
<tr>
<td>Canadian Business Patterns</td>
<td>Challenge in determining economic impact of tourism at County or even Municipal level.</td>
</tr>
<tr>
<td></td>
<td>Opportunities</td>
</tr>
<tr>
<td></td>
<td>DMO partners working together to get a &quot;dashboard&quot; of metrics we can collect and understand.</td>
</tr>
<tr>
<td>Demand</td>
<td>Challenge - Gaps</td>
</tr>
<tr>
<td>Grey County Tourism Attraction/Event survey</td>
<td>Limited # of participants, not geographically representative of the county, includes residents as well as visitors, does NOT include most of our Tourism Industry.</td>
</tr>
<tr>
<td>GCT Web Analytics &amp; Campaign</td>
<td>Doesn’t measure actual visitors, just response to campaigns. Who is really visiting?</td>
</tr>
<tr>
<td>OMTCS Regional Tourism Profile</td>
<td>Not current – usually 3 year delay.</td>
</tr>
<tr>
<td></td>
<td>+/- 7% accuracy at BruceGreySimcoe region, on +/- 14% accuracy at Grey County</td>
</tr>
<tr>
<td></td>
<td>Custom Analysis to get meaningful activity data.</td>
</tr>
<tr>
<td></td>
<td>Only domestic market for Grey County.</td>
</tr>
<tr>
<td>PRIZM Segmentation</td>
<td>Is a powerful tool, is proprietary (expensive) and takes time to understand and benefit from.</td>
</tr>
<tr>
<td></td>
<td>Opportunities</td>
</tr>
<tr>
<td></td>
<td>Tourism Action Plan calls for annual business survey to obtain key visitor data. Are businesses interested in these metrics enough to participate? If so, how frequently – by season? PRIZM analysis could be offered by GCT as a tool for businesses/DMOs in exchange for some aggregation of high-level results.</td>
</tr>
</tbody>
</table>
Grey County Tourism acknowledges the assistance of rmcg in providing material & insight for this Backgrounder.