

To:	Chair and Members of the Tourism Advisory Committee
Committee Date:	January 24, 2018
Subject / Report No:	CAOR-TAC-05-18
Title:	Tourism Research and Data Analyst Project
Prepared by:	Bryan Plumstead
Reviewed by:	Kim Wingrove, Chief Administrative Officer;
Lower Tier(s) Affected:	
Status:	Recommendation endorsed by Committee as presented per Resolution TAC09-18; Endorsed by Committee of the Whole February 8, 2018 per Resolution CW58-18;

Recommendation

1. That Report CAOR-TAC-05-18 be received; and
2. That the Tourism Research and Data Analyst project be supported and that staff be directed to move forward in securing further project partners and funding; and
3. That staff will bring a report to County Council once the project is finalized, and that Grey County's contribution to this project be funded from the Tourism Reserves as a one-time project up to \$20,000.

Executive Summary

Grey County Tourism and Regional Tourism Organization 7 (RTO7) propose a one-year Tourism Research and Data Analyst Project. Lack of reliable and timely tourism data has been widely recognized at the local, provincial and national levels and within Grey County's Tourism Destination Development Action Plan. Project costs still have to be finalized and are estimated at \$100,000 - \$120,000, with Grey County contributing \$20,000 from Tourism Reserves.

Background and Discussion

Lack of reliable and timely tourism data has been widely recognized at the local, provincial and national levels. A recent Rural Tourism Symposium confirmed tourism data as one of the top challenges facing rural destinations. Grey County's Destination Development Action Plan (DDAP) recognized this challenge, and sets out recommendations under Pillar 3, Market

Research and Tracking, namely the development of a “scorecard” based on compiling data from secondary sources and undertaking an annual operator survey to collect primary data on visitors and trends. At Grey County’s first Lets Talk Tourism session in September 2016, the Tourism Manager presented some of the current data sources, gaps and opportunities in [Pillar 3: Market Research & Tracking Backgrounder](#).

Over the past two years Grey County has made progress in accessing readily available tools (Statistics Canada, Ministry of Tourism Regional Profiles and Activity Reports, Ontario Ministry of Agriculture Food and Rural Affairs Analyst) and in purchasing licenses for third party tools such as Environics PRIZM, STRAVA (cycling data) and in delving deeper into our website and social media metrics to understand on-line search and interest in Grey County. An annual cycling business survey and a survey of larger events and attractions have been undertaken for several years.

Results to date include:

- Development of an online cycling map that includes a layer of cyclist volumes based on STRAVA data;
- An overview of Cycling in Grey County that assisted the Transportation Services department in their research into the benefits of paved shoulders, and;
- Creation of a BLUE cluster backgrounder that identified the top 4 PRIZM segments to Blue Mountain, based on aggregating data from several businesses, and then using this analysis to assist South Georgian Bay in geo-targeting high potential areas for direct distribution of their See & Do guide.

This same approach will be used this year for a direct distribution of our Grey County Map into high potential areas. We will be conducting an operator survey shortly to collect data on 2017 performance to complete our Tourism Snapshot.

The Tourism Manager spends about 25% of his time in market research and tracking and results are limited to DDAP deliverables and a few select projects. There is a huge opportunity to more fully leverage our existing licenses, look more deeply into other data sources including some of the potential applications of Big Data (financial services, mobile, etc.) and to develop a more fulsome understanding of our tourism visitors and potential markets.

Tourism Research & Data Analyst Project

Grey County Tourism and Regional Tourism Organization 7 (RTO7) propose a one-year Tourism Research and Data Analyst Project to undertake this work, and to create templates and outputs that can be shared with tourism industry and municipal partners. Grey County Tourism and RTO7 would like to secure a third partner for this project and hope to do so shortly. Once all partners are in place, we will jointly refine the scope, deliverables and budget of the project, and apply for senior government funding. Grey County Tourism would provide office space and supervision of this project on behalf of the other partners. Grey County recently hired a Planning Data Analysis Coordinator (PDAC.) The PDAC currently is working on a number of projects for the Children’s Services department and there is some time that can be devoted to providing advisory assistance for this project. Between the PDAC and our GIS staff, we have some excellent advisor capability, as well as building the projects outputs into GIS mapping if applicable, and a legacy plan once the project is completed.

Potential Data Sources and Work

EnviroNics PRIZM analysis – While RTO7 and Grey County have done a fair bit of work in PRIZM, we are not fully leveraging our license or insights. A full time data analyst could significantly improve the quality and quantity of results and insights and lead to more engagement and sharing of results with partners. Data typically comes from accommodators, attractions, businesses, events and reports provide market segmentation, media preferences and behaviour. Tracking trends over time is also key. While the 2018 EnviroNics license is in place for all of Ontario, the project would pay for a Quebec license to allow insights into current and potential visitors from Quebec.

Economic Impact of Tourism – Jobs, expenditures, taxes generated. Tourism is a hard industry to define and measure, and often is not widely understood. OMAFRA's Analyst program provides business counts, jobs, and recently an input-output model. More work needs to be done on getting a uniform definition of and understanding of tourism, as a sector to compare with other sectors, and of the value chain that relies on inputs from many other sectors. This project would look at all available data sources: Census (National Household Survey), Taxfile Data, Business Counts, County Assessment, etc.... to better define tourism volume, value and change over time. Potential to create a template of economic impact for understanding by Destination Marketing Organization's (DMOs) in BruceGreySimcoe, and this could have applicability across Ontario.

South Georgian Bay Labour Market Task Force – This project would support the SGBLM Task force with insights into tourism expenditures, economic impact, trends, workforce issues.

Big Data - Smart Technology – Grey County's finish as a Top 7 Intelligent Community in 2017 demonstrated that we have many innovative and forward thinking businesses, communities and government organizations. Kicking the tires with big data for better understanding of our tourism and economic development trends and opportunities is another opportunity with this project. Financial services and mobile data are two potential sources among many. Assessing the capability and cost of these sources and potentially purchasing some data depending on budget is within the project scope.

Financial and Resource Implications

One Year Project – Commencing in May, 2018

Draft Budget: Minimum \$ 100,000 to maximum \$120,000 (depending on partner contribution and funding source and leveraging)

Revenues

Grey County	\$20,000
RTO7	\$20,000
3 rd partner	\$10,000 - \$20,000
Government Funding	\$50,000 - \$60,000

Costs

Analyst Salary and Benefits	\$80,000
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Computer, office overhead, travel	\$5,000
Data Licenses	\$15,000 - \$35,000

The Tourism Manager would supervise the Data Analyst with office space and payroll provided by Grey County. Some advisory assistance is requested from the Planning Data Analyst contingent on workload and availability. Grey County's contribution of \$20,000 will come from Tourism Reserves as a one-time project, with no impact on the 2018 tax levy. Tourism's Reserve balance is currently \$142,066.

Relevant Consultation

- Internal (Director of Planning)
- External (RTO7 Executive Bill Sullivan)

Appendices and Attachments

[Pillar 3: Market Research & Tracking Backgrounder.](#)