
Tourism Survey Review 2012

Results from April – November
2012 Collection Period

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1.0 Executive Summary

The purpose of the tourism survey is to determine if people who visited a destination in Hastings County received excellent customer service and determine their demographics and characteristics (i.e. age, spending, and origin). The survey is an initiative that resulted from the Premier-ranked Tourist Destination Action Plan under Recommendation #4: "implement an annual county-wide visitor survey process designed to measure and track levels of customer satisfaction and value for money". While the goal for the sample project was to collect 400 responses, the tourism survey program received a total of 322 responses (159 for attractions and 163 for festivals and events). The following are some of the key findings or results determined after reviewing the data received:

Visitor Demographics

- 95% of visitors came from within Ontario; 57% came from outside Hastings County, but within Ontario, and about 26% were from the Greater Toronto Area.
- The most common group size was 'two people' (36%) and the second most common size is 'more than 5 people' (22%).
- The average age range for visitors was '46-65', where 24% had 'two people' in this range (based on attraction survey results only).
- About 35% of the visitors' groups spent '\$100 - \$499' over the duration of their trip, and 22% said their group spent 'under \$100' (based on attraction survey results only).

Visitor Experience

- Over 50% of visitors had visited the destination before (returning visitor).
- 'Leisure' (38%) and 'visiting relatives and friends' (35%) were the most common reason for travel, followed by 'day trip' (12%). About 16% of visitors selected more than one reason (based on attraction survey results only).
- 32% of visitors travelled to the destination for 'outdoor recreation', while 14% came for 'arts and culture' and 15% selected more than one experience (based on attraction survey results only).
- 40% of visitors stayed overnight in paid accommodations, of these visitors 27% stayed for either 'one night' or 'two nights'.
- Close to 58% of visitors found out about the destination by 'word of mouth', followed by 20% who 'live within the area' and 17% who used the Internet ('Website/Twitter/Facebook').
- 66% of visitors rated their overall experience as '5 – excellent', and 24% rated their experience as '4'.
- 86% rated the service they received as 'excellent' (based on attraction survey results only).
- Over 65% said their overall impression of the destination was 'excellent' and 92% said they would recommend it to their family and friends

From the surveys, a total of 106 additional comments were provided by visitors (33%) and the majority were positive.

For the collection process, completed surveys were collected from eight attractions and five events. There was a variation in the number of surveys received from each attraction, where a majority of surveys were from one accommodator in North Hastings. For events, an equal distribution of surveys received was achieved. For 2013, each participating business, organization and event should be

encouraged to provide a prize for their location in an effort to increase participation by their customers and guests, particularly at attractions that are not accommodators and at festivals and events. Another option is to provide one grand prize to be drawn in the Fall, such as a tablet or iPad.

Overall, the 2012 tourism survey program proved to be another successful year and gathered insightful information about visitor demographics and experiences at a greater variety of locations and events within Hastings County compared to 2011. The survey should continue for 2013 and greater efforts should be made to further establish the importance of the project among the tourism industry stakeholders, and local communities and businesses. In addition, efforts need to be made to increase awareness of the available survey booth that event organizers can borrow at no cost from Hastings County.

Hastings County would like to thank the many businesses, attractions and events that participated in the 2012 tourism survey program and helped distribute the surveys to visitors throughout the season. We would also like to say a big thank you to everyone that took the time to complete the survey.

2.0 Survey Collection Process

2.1 Distribution Locations

Surveys were distributed and collected at seven attractions and five festivals and events throughout Hastings County (a total of 13 locations):

- Farmtown Park in Stirling, ON
- The Old Carriage House in Stirling, ON
- Bancroft Chamber of Commerce in Bancroft, ON
- Limerick Lake Lodge in Limerick, ON
- Teddy Bear Bed and Breakfast in L'Amable, ON
- Limerick Lake Lodge & Marina, Limerick, ON
- Madoc Visitor Information Centre & Skate Park, Centre Hastings, ON
- Sunny Side Restaurant, Centre Hastings, ON

- Water Buffalo Festival in Stirling, ON
- Hastings County Plowing Match and Farm Show in Tweed, ON
- Hastings County Beer Festival in Stirling, ON
- Bancroft Wheels, Water & Wings in Bancroft, ON
- Rockhound Gemboree in Bancroft, ON

In addition, the Bancroft Chamber of Commerce and Marmora Visitor Information Centre promoted access to the online survey through their websites.

2.2 Collection Period

Responses for the survey were collected from the beginning of April 2012 until the end of November 2012. The collection period focused on capturing visitor feedback for the peak summer season and the end of the spring and fall off-seasons.

3.0 Revisions to Survey Program

Based on recommendations from the 2011 survey program, a separate survey was created for distribution at Festivals and Events. The survey presented fewer questions, but those listed were the exact same as the Attractions survey to maintain consistency of results. This revision made a significant impact on the willingness of visitors to complete the survey while at an event, based on limited time and details required. The original survey created in 2011 was reused for the Attractions survey (which includes accommodations, restaurants, Visitor Information Centres (VIC), and tourism attractions).

In addition, the 2012 survey program was expanded to include an online survey that featured the same questions presented in the Attractions survey. Access to this survey was promoted on the Hastings County tourism site, visithastings.ca, as well as on the Bancroft Chamber of Commerce and Marmora Visitor Information Centre websites.

4.0 Tourism Survey Results

A total of 322 responses were received throughout the collection period. Results were analyzed based on the overall results per question, as well as by dividing the results based on the distribution category (Attraction = accommodations, restaurants, tourism attractions, Visitor Information Centres (VIC); and Events = festivals and events).

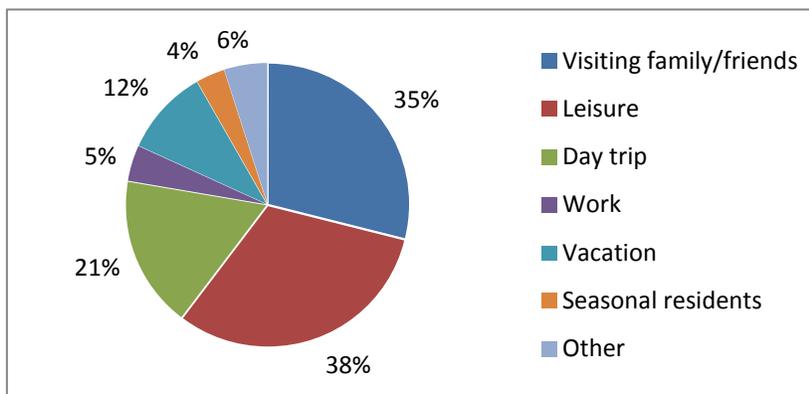
4.1 Visitor Origin & Returning Visitors

From the 322 responses, visitor origins were as follows:

- Within Hastings County: 120 visitors
- Outside Hastings County / Within Ontario: 183 visitors
- Outside Ontario: 19 visitors

Slightly less than 40% of visitors were from within Hastings County, while about 26% (84 visitors) were from the Greater Toronto Area, the most popular visitor origin outside Hastings County. In addition, for over half the visitors it was their first time visiting the area.

4.2 Reason for Visiting

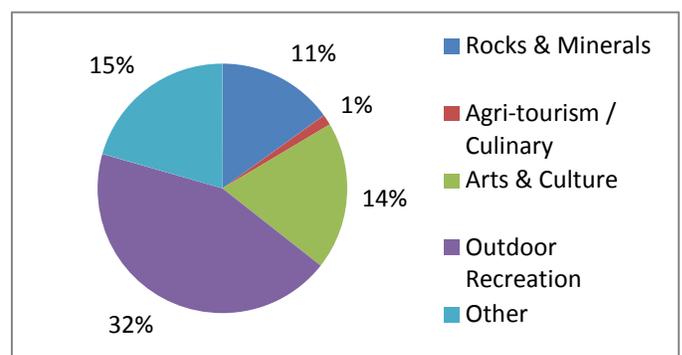


The main reasons for visiting were 'leisure' (38%) and 'visiting friends/family' (35%), followed by 'day trip' (21%) and vacation (19%). In addition, 26 visitors (16%) had selected more than one reason, thus percentages add up to more than 100%. Note: not all visitors provided an answer for this question, thus

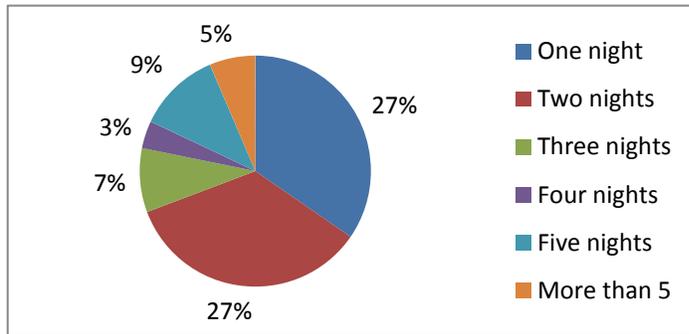
the percentages are based on the responses divided by the total number of surveys completed. (*based on attraction results only)

4.3 Attracting Experience

The predominate experience that attracted visitors to visit Hastings County was for 'outdoor recreation', which was selected by 32% of visitors. The second most common experience was 'arts and culture' for 14% of visitors and 'rocks and minerals' for 11% of visitors. Also, 24 visitors (15%) selected more than one experience for being the attraction to the area, and the same number of visitors indicated 'other'. Note: not all visitors provided an answer for this question, thus the percentages are based on the responses divided by the total number of surveys completed. (*based on attraction results only)



4.4 Length of Stay in Accommodations



About 40% of visitors stayed overnight in accommodations. Of these visitors, 27% stayed one or two nights at a paid accommodation and 9% stayed for five nights. Less than 15% (20 visitors) stayed for three to four nights, or more than five nights during their trip. Note: not all visitors who stayed overnight provided an answer for this question, thus the

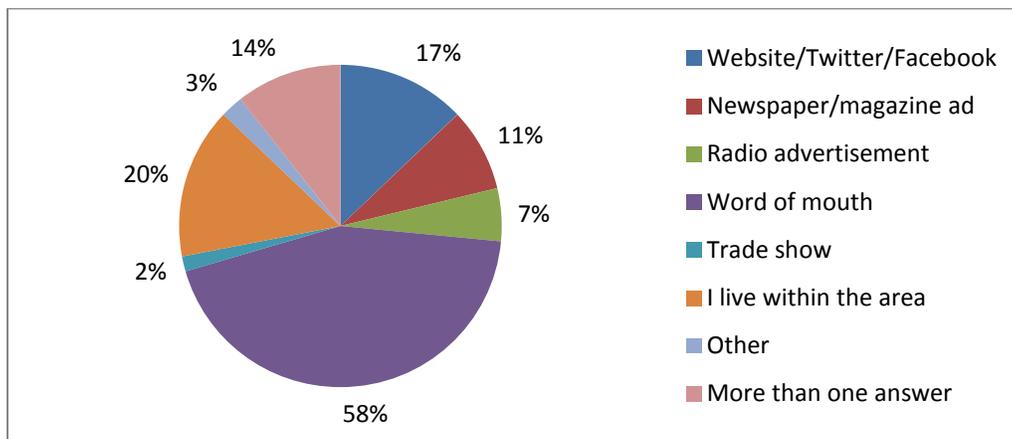
percentages are based on the responses divided by the total number of visitors who stayed overnight.

4.5 Rating Overall Visitor Experience

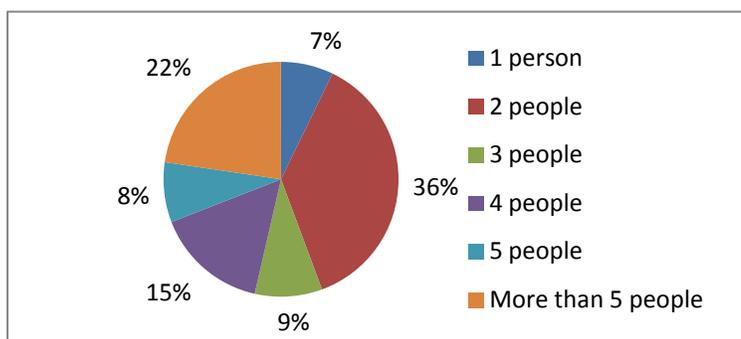
When asked about their overall experience, the majority of visitors (66%) gave a “5” – excellent rating, followed by 24% who rated “4” and 4% who rated “3”. Only two visitors gave a rating of “1” and “2”.

4.6 Source of Information for Visiting

The most popular resource visitors used to find out about the attraction they had visited was through ‘word of mouth’ (58%), while 20% said they ‘lived in the area’ and 17% said through the ‘Website/Twitter/Facebook’. Less than 15% gave more than one answer, thus percentages add up to more than 100%.



4.7 Travelling Group Size

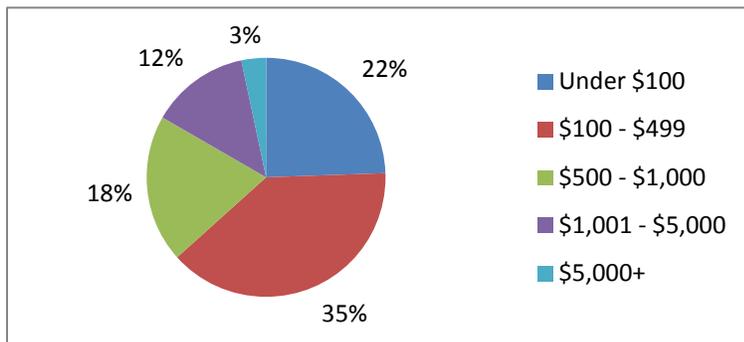


The most popular group size was ‘two people’ (36%). However, 22% travelled in a group of ‘more than five people’. In addition, 15% had a group size of ‘four people’ and only 7% were in a group of ‘one person’. Note: not all visitors provided an answer for this question, thus the percentages are based on the responses divided by the total number of surveys completed.

4.8 Visitor Age

When asked about the age categories their group included, the majority of visitors had 'two people' aged '46-65' (24%), making it the most common age category among groups. For other categories, 10% of visitors had at least 'one person' or 'two people' that were 'under the age of 18'. About 12% of visitors had 'one person' that was aged '18-30', while 6% had 'two people' aged '18-30'. Over 15% of visitors had 'one person' that was aged '31-45' and 12% have 'two people' aged '31-45'. In addition, 20% of visitors had 'one person' aged '46-65' and 12% have at least 'two people' that were age '65+'. The age category results were based on 154 visitors who stated group size. Note: not all visitors provided an answer for this question, thus the percentages are based on the responses divided by the total number of surveys completed. (*based on attraction results only)

4.9 Visitor Spending



About 35% of visitors said their entire group would spend \$100 to \$499 throughout the duration of their visit, making it the most common spending range. The second most popular range was groups spending under \$100 at 22%, while 18% said \$500 to \$1,000 and 12% said \$1,001-\$5,000. Note: not all visitors provided an

answer for this question, thus the percentages are based on the responses divided by the total number of surveys completed. (*based on attraction results only)

4.10 Overall Impression & Recommendation

Over 65% of visitors said their overall impression was 'excellent' and 21% said it was 'good'. Only 3% reported their overall impression as 'fair' and no visitor said it was 'poor'. For whether or not a visitor would recommend the destination visited, 92% of visitors answered 'yes' and none of the visitors said 'no', but 3% answered 'maybe'. Note: not all visitors provided an answer for this question, thus the percentages are based on the responses divided by the total number of surveys completed.

4.11 Additional Comments

There were a total of 106 comments provided by visitors, and for contact information, 98 visitors put their contact information on the survey, about 74%.

- Friendly interesting people; like the forests and lakes; slower pace than Hamilton and Toronto.
- The hospitality was excellent. The setting of the B&B beside the lake is amazing.
- Our visit to the Hastings area was pleasant and enjoyable as always!
- Clean restaurant, good food, excellent service.
- Very friendly town. My wife and I are very impressed with the service here. Thank you.
- Great park, clean, neat and well maintained.
- Thank goodness for people who have put so much work into this museum.
- Love the event every year.
- Smells so good, lots of fun even in the rain!
- Great opportunity to find out what's new in the farming world.

5.0 Visitor Trends in Hastings County

5.1 Trends between 2011 and 2012 Survey Results

The 2012 survey program has increased in number of completed surveys received by 2.75%, which was anticipated as the length of the program for 2012 was April to November, while in 2011 the program was from August to November.

2011	2012	Change
117 responses	321 responses	174%

Visitor Demographics

- There was no significant change in the amount of visitors who came from within Ontario (2011, 91% / 2012, 95%), and roughly the same percentage of visitors came from the Greater Toronto Area (2011, 30% / 2012, 26%).
- For both years, the most common group size was 'two people' and the average age range for visitors was 'age 46-65', where at least two people in the group were of this age range.
- The average group spends '\$100-\$499' over the duration of their trip (both in 2011 and 2012), followed by 'under \$100' for spending.

Visitor Experience

- The majority of visitors coming to Hastings County in 2011 and 2012 had visited the destination before, making them return visitors.
- Between 2011 and 2012, the most common reason for travel was 'visiting friends and family' and 'leisure', followed by 'day trip'.
- Each year visitors primarily travel to the area for 'outdoor recreation'; however, in 2011 visitors also came for 'rocks and minerals' and 'agri-tourism/culinary', while in 2012 visitors came for 'arts and culture'.
- Fewer visitors stayed overnight in paid accommodations in 2012 (40%) compared to 2011 (70%).
**This is the result of more surveys being collected at attractions and events than at accommodators in 2012.* In both years, overnight guests stayed for either 'one night' or 'two nights'.
- Most visitors primarily find out about the destination they visited by 'word of mouth', followed by the internet ('website/Twitter/Facebook') both in 2011 and 2012.
- The majority of visitors rated their overall experience as '5 – excellent' in both years, as well as rated the service they received as 'excellent'.
- Over 60% in 2011 and 2012 said their overall impression of the destination was 'excellent' and over 90% said they would recommended it to their family and friends.

From 2011 to 2012, roughly the same number of visitors provided comments in relation to the number of surveys received (about 35%).

5.2 Comparison: 2010 Statistics Canada Visitor Statistics

Statistics Canada recently released the *Travel Survey of the Residents of Canada (TSRC)* and *International Travel Survey (ITS)* results for Hastings County.

Key findings for 2010 include:

- Hastings County represented 1.5% of Ontario's visits (1.5 million visits) and 1% of Ontario's visitor spending (169 million).
- Tourism in Hastings County contributed \$98 million to the local GDP, which included over 1,500 businesses and supported more than 1,700 jobs.
- Visits to Hastings County decreased by 39% in 2010 and visitor spending dropped 25% compared to 2009
- Visitors to Hastings County are primarily Ontario residents taking overnight pleasure and "visit friends and relatives" trips.
- Ontario visitors represented 93% of visits (86% of spending) in Hastings County.
- Visitors to Hastings County spent their tourism dollars on:
 - Transportation = 24%
 - Accommodation = 17%
 - Food & Beverage = 33%
 - Recreation = 2.4%
 - Culture = 4.1%
 - Retail = 19%

6.0 Recommendations for 2013 Tourism Survey

With the completion of the second year for the tourism survey program, feedback was again received from participating distribution locations and other tourism industry stakeholders.

Members of Hastings County Opportunities in Tourism (HOT) Working Group noted that there was a need for more volunteers at events collecting surveys and more attractions involved in the program. This issue was also noted in the 2011 survey report. In addition, the working group recommends that when volunteers cannot be present at an event, a standalone survey booth be provided to promote and draw visitors in to complete a survey. For 2013, it will continue to be essential for more events and festivals to have the survey present, particularly events that focus on attracting visitors from outside Hastings County and are interested in applying for grant programs (i.e. Celebrate Ontario).

It is recommended that the questions in the Attraction and Festivals & Events surveys remain the same as the previous year, but the design be updated to reflect the new Hastings County Opportunities in Tourism (HOT) logo.

In addition, the incentive for visitors to fill out the survey (enter a draw to win a gift basket) was well received as 74% of visitors provided their contact information. A total of five prizes were donated by local businesses and included: Stirling-Rawdon Bucks, Deseronto Dollars, gift certificate from the Hidden Gold Mine (Madoc, ON), a sweater and passes to Marmora SnoFest 2012, and boat rental at Limerick Lake Lodge & Marina. It is recommended that prizes be offered as an incentive for 2013 and promote the chance to win 1 of 10 local prizes. The draw for prizes would take place in January/February 2014.