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# Tourism Survey Review 2011

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Results from August - December,  
2011 Collection Period

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## 1.0 Executive Summary

The purpose of the tourism survey is to determine if those who visited a destination in Hastings County received excellent customer service and determine visitor demographics (i.e. age, spending, and origin). It 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.

The goal for the sample project was to collect 400 responses. For 2011, the tourism survey received 132 responses. With the addition of the 117 responses from the Hastings County Beer Festival survey and 52 responses from the Elvis Festival survey, a total of 301 responses were received and are the basis for analyzing visitor demographics and experiences in Hastings County.

### *Visitor Demographics*

- 91% of visitors came from within Ontario; 30% from the Greater Toronto Area
- The most common group size was 'two people' (40%) and the average age range for visitors was 'age 46-65', where 30% had at least two people in the age range within their group
- About 40% of the visitors' groups spent '\$100 - \$499' over the duration of their trip, and 24% said their group spent 'under \$100'

### *Visitor Experience*

- Close to 60% of visitors had visited the destination before (returning visitor)
- 'Visiting relatives and friends' and 'leisure' were the most common reason for travel (22%), followed by 'day trip' and 'vacation' (13%)
- 30% of visitors travelled to the destination for 'outdoor recreation', while 18% came for 'rocks and minerals' and 'agri-tourism/culinary'
- 70% of visitors stayed overnight in paid accommodations, 39% stayed for 'two nights' and 33% stayed for 'one night'
- Close to 45% of visitors found out about the destination by 'word of mouth', followed by 27% who used the Internet ('Website/Twitter/Facebook')
- 70% of visitors rated their overall experience as '5 – excellent', and 85% rated the service they had received as 'excellent'
- Almost 60% said their overall impression of the destination was 'excellent' and 95% said they would recommend it to their family and friends

From the surveys, a total of 44 additional comments were provided by visitors and the majority was positive. About 74% provided their contact information to be entered into the draw to win a prize. The greatest contributing category for survey distribution locations was accommodations, which accounted for 58% of all the surveys received.

The distribution category with the lowest rating for overall impression was events. However, over 60% of visitors at the Hastings County Beer Festival and Elvis Festival scored their experience at the event '10' or 'Hi – 5 out of 5'. In addition, over 80% said they were likely to return.

For the collection process, completed surveys were collected from eight of the 14 distribution locations. The level of participation was relatively low among tourism businesses and organizations in terms of

promoting the survey and encouraging responses from visitors. For 2012, DMOs and supporting tourism organizations and individuals within communities (i.e. EDOs) need to support the project and ensure that at least one business or organization in their community is distributing/collecting surveys. In addition, the survey design was not well received at festivals and events, as some of the questions were not applicable and the survey itself was considered 'too lengthy' by visitors. It is recommended that a separate festivals and events tourism survey be created.

Overall, the 2011 tourism survey proved to be successful and gathered insightful information about visitor demographics and experiences at a variety of locations within Hastings County. The survey should continue for 2012 and greater efforts should be made to further establish the importance of the project among the tourism industry stakeholders, and local communities and businesses.

## 2.0 Survey Collection Process

### 2.1 Distribution Locations

Surveys were distributed at 14 locations throughout Hastings County:

- Hastings County Agricultural Museum in Stirling, ON
- The Old Carriage House in Stirling, ON
- The Stirling Theatre in Stirling, ON
- Train Station Tourist Centre in Stirling, ON
- Water Buffalo Festival in Stirling, ON
- Hastings County Plowing Match and Farm Show in Tweed, ON
- Spotted Dog Bed and Breakfast in Madoc, ON
- Marmora Inn in Marmora, ON
- Visitor Information Centre in Marmora, ON
- Limerick Lake Lodge in Limerick, ON
- Teddy Bear Bed and Breakfast in L'Amable, ON
- Bancroft Bed and Breakfast in Bancroft, ON
- Bancroft Chamber of Commerce in Bancroft, ON
- Princess Sodalite Mine Rock Shop in Bancroft, ON

Overall, surveys were collected from eight of the locations listed.

### 2.2 Collection Period

Responses for the survey were collected from Monday, August 10 until Thursday, December 8, 2011. The collection period focused on capturing visitor feedback for the fall season, which is at the end of the peak season for tourism.

## 3.0 Tourism Survey Summary of Results

A total of 132 responses were received throughout the collection period. Results were analyzed based on the overall responses per question, as well as by dividing the responses based on the distribution category (Accommodation, Attraction, Event, and Visitor Information Centre).

### 3.1 Overall Responses per Question

#### **Question #1: Where are you visiting from?**

- Within Ontario: 120 visitors
- Out of Province/Within Canada: 4 visitors
- Outside Canada: 8 visitors

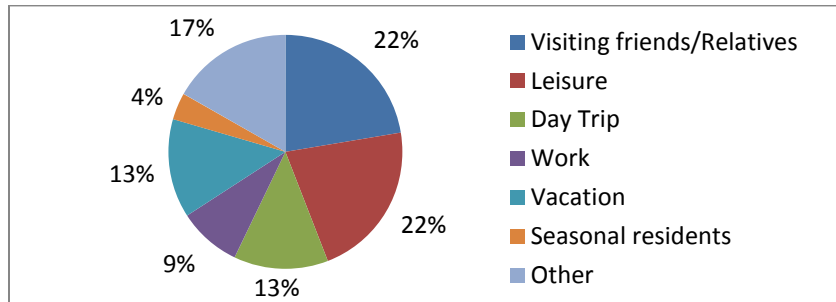
Of the 132 visitors, about 30% (39 visitors) were from the Greater Toronto Area, where 16 visitors were from the City of Toronto and 8 were from Whitby. The second most popular location of origin was Ottawa at 6%, which accounted for 8 visitors. Other locations of origin included Barrie (5 visitors), Burlington (4), Lindsay (4), and Peterborough (4). Three of the visitors were from within Hastings County.

**Question #2: Is this your first visit to (location surveyed)?**

About 58% of visitors said that it was not their first time visiting the location, while 39% said it was their first time. Only four visitors did not answer the question.

**Question #3: What was the reason for your visit?**

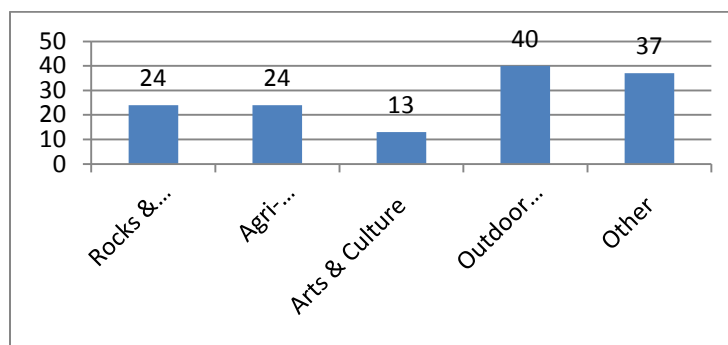
The main reasons for visiting were ‘visiting friends and relatives’ and ‘leisure’ (22%), followed by ‘day trip’ and ‘vacation’ (13%). While ‘other’ accounts for 17%, the various reasons provided do not account for a significant percentage individually.



Note: For this question, visitors were able to select more than one checkbox, thus percentages may add up to more than 100%.

**Question #4: Did you travel to this destination for any of the following:**

The predominate theme that attracted visitors to visit Hastings County was for ‘outdoor recreation’, which was selected by 30% of visitors. Both ‘rocks and minerals’ and ‘agri-tourism/culinary’ were selected by 18%. Of the visitors who selected ‘other’, 6% said that the ‘Rally of the Tall Pines’ was their reason for travelling to Hastings County.



Note: For this question, visitors were able to select more than one checkbox, thus the total for responses adds up to more than 100.

**Question #5: On a scale of 1-5, how would you rate your overall experience at this destination?**

About 70% of visitors rated their overall experience to be ‘5 - Excellent’ and 23% said ‘4’. Only four visitors rated ‘3’, followed by two visitors who rated their experience as ‘2’. No visitor rated their overall experience as ‘1 – Poor’. Three out of the 132 visitors did not answer this question.

**Question #6: How would you rate the service you received?**

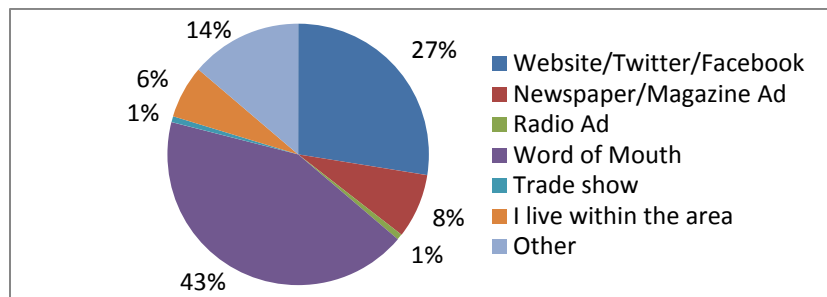
Rating the service received as 'excellent' was 85% of visitors and 11% rated 'good'. Only one visitor reported having received fair service. Four of the 132 visitors did not answer this question.

**Question #7: Did you stay overnight in paid accommodation? If yes, how many nights did you stay?**

A total of 92 visitors (70%) stayed overnight in paid accommodations. Of the 92 visitors who answered 'yes', 11 did not respond to how many nights they stayed. Over 70% of visitors stayed between one to two nights; 39% stayed for two nights and 33% stayed for one night. Less than 10% stayed for three nights, and only 3% stayed more than five nights.

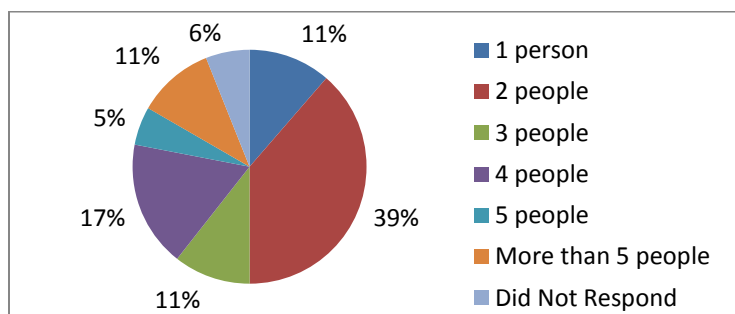
**Question #8: How did you find out about this destination?**

The most popular resource visitors used to find out about the destination they had visited was through 'word of mouth' (43%), while 27% said they gained information from the Internet through 'Website, Twitter, Facebook'.



**Question #9: How many people are in your group?**

Almost 40% of visitors said their group contained 'two people', making it the most common group size. The second most common size was 'four people', which was indicated by 17% of visitors. Eight of the 132 visitors did not answer this question.



**Question #10: In your group, how many people are ...**

a) **Under the age of 18?**

Of the 124 who responded to group size, 7% had 'two people' in their group under the age of 18, followed by 6% who said they had 'one person' in the group in this age category.

b) **Age 18-30?**

From the 124 visitors, 10% said there was only 'one person' in their group in this age range, while 5% had 'five people'. Having 'two people' in the group between 18 and 30 was noted by 4%, as well as having 'three people'.

c) **Age 31-45?**

About 11% of the 142 visitors had 'one person' in their group between the ages of 31 and 45, followed closely by 10% who had 'two people' in this age range.

d) **Age 46-65?**

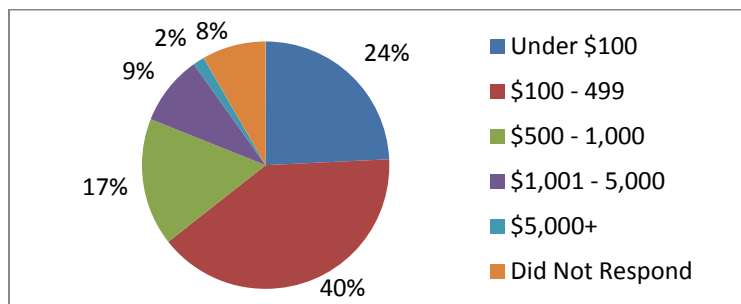
The most common age group for visitors was within the ages of 46 to 65, where 31% of the 124 visitors had 'two people' in this age range in their group, and 23% had 'one person'. In addition, 5% have 'more than five people' in their group in this age range.

e) **Age 65+**

Of the 142 visitors, 15% had 'two people' in their group aged 65+ and 9% had 'one person'.

**Question #11: Approximately how much did or will your entire group spend on your visit?**

About 40% 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 24%, while 17% said \$500 to \$1,000. Only 8% of the 132 visitors did not provide an answer for this question.



**Question #12: When thinking about your dining, accommodation and experience, what is your overall impression?**

Close to 58% of visitors said their overall impression was 'excellent' and 27% said it was 'good'. Only 3% reported their overall impression as 'fair' and less than 1% said it was 'poor'. Of the 132 visitors, 11% did not provide an answer for this question.

**Question #13: Would you recommend this destination to your family and friends?**

For whether or not a visitor would recommend the destination visited, 95% of visitors answered 'yes' and 5% said 'no'. No visitors answered 'maybe', and 5% of the 132 total visitors did not answer this question.

**Other comments about your visit?**

There were a total of 44 comments provided on the surveys received, some of which included:

- We felt very relaxed by the end of our visits. Rooms are clean and the whole of the premises is kept beautifully. (Spotted Dog Bed and Breakfast)
- Staff at Tourist Shop very nice and helpful. (Bancroft Chamber of Commerce)
- B&B always recommended great hospitality and they know all about the area and helped pick things to do/go/see. (Teddy Bear Bed and Breakfast)
- It would be nice if there were more eco-tours, even nicer if geared towards kids. My kids are nature nuts and with this entire region has going for it, we found it all missing. (Bancroft area)
- Always welcomed with open arms and treated like royalty. (Teddy Bear Bed and Breakfast)



- Really liked Old L'Amable beach. Wish there was an alternative to McDonald mine. Princess Sodalite was okay, but something like a tour would be better. (Bancroft area)
- Rockhounds rejoice! (Bancroft area)
- Had a good time! (Hastings County Plowing Match and Farm Show)
- We loved our stay at The Old Carriage House. Linda is a wonderful host. (Old Carriage House)
- This is the first time we have stayed at a B&B - we usually come in our camper. Know the area fairly well and keep coming back for the beauty of Algonquin. We've really enjoyed the B&B - gracious hostesses who went over and beyond - evening snacks, hiking treats, helping us organize our evening outing to the observatory. (Teddy Bear Bed and Breakfast)

**Question #14: Please provide your contact information if you are interested in being entered into a draw.**

For contact information, 98 visitors put their contact information on the survey, about 74%.

### 3.2 Accommodation Responses

A total of 77 surveys were completed at an accommodation, accounting for 58% of the surveys collected and was the greatest contributing group. Of these visitors, 56% said it wasn't their first time visiting the accommodation, and only 4% did not answer the question.

The main reason for travel was 'visiting family and friends' (29% of the 77 responses), followed by 'leisure' with 28% and 'vacation' at 17%. About 27% had a different reason for their visit, where 14% travelled to the destination because of the Rally of the Tall Pines. The most popular theme for travel was 'outdoor recreation', which represented 38% of responses.

Over 85% of visitors rated their overall experience as '5 - excellent' and 96% rated their service received as 'excellent'. For the number of nights visitors stayed overnight, 40% stayed for 'two nights', while 31% stayed for only 'one night' and 10% stayed for 'three nights'. Of the 77 visitors, 16% did not answer the question for number of overnight stays. For marketing and promotion, 40% found out about the destination through 'word of mouth' and 39% from 'Website/Twitter/Facebook'.

The most popular group size was 'two people' (35%). However, 21% travelled in a group of 'more than five people'. In addition, 12% had a group size of 'one person' or 'four people', and 10% were in a group of 'three people'. The predominate age range for visitors was 'age 46-65', in which 66% had between 'one person' (25%) and 'two people' (31%) in this age range. The second most common age range was 'age 31-45' at 33%, followed by 'age 18-30' at 17%.

For the 77 visitors, 51% said they would spend between '\$100-\$499' on their trip, while 21% said between '\$500 - \$1,000'. Overall impression was rated as 'excellent' by 73% of visitors and as 'good' by 21%. In addition, 97% of visitors said they would recommend the destination to their friends and family.

### 3.3 Attraction Responses

Only 13 surveys were completed for all the attractions that distributed surveys, accounting for only 10% of the total responses. For attractions, 54% said it was their first time visiting the destination, while 46% said 'no'. The most common reason for travel was 'leisure' (38%), followed by 'visiting family and friends' at 31% and 23% who said for 'vacation'. In addition, 62% visited the attraction because they were interested in 'rocks and minerals', while 46% visited for 'outdoor recreation' and 23% for 'arts and culture'.

For overall experience at the attraction, there was equal rating (46%) for '4' and '5 – Excellent' among visitors, and for rating the service they received, 77% said 'excellent' and 15% rated 'good'. Of the 13 visitors, 38% stayed overnight in paid accommodation, while 62% did not. For those who stayed overnight, 40% stayed for 'two nights' and for 'more than 5 nights', while 20% stayed for 'four nights'.

For marketing and promotion, 62% found out about the attraction by 'word of mouth', and 23% by 'Website/Twitter/Facebook'. For group size, the most popular group size was 'two people' (46%), followed by a group of 'four people' (38%). The predominate age range among groups was 'age 46-65' (69%).

Over 45% of visitors stated their group would spend 'under \$100' on their trip, while 23% said they would spend '\$100 - \$499' or '\$500 - \$1,000'. Overall impression of the attraction visited was rated 'excellent' by 46% and rated 'good' by 38%. In addition, all visitors said 'yes' when asked if they would recommend the destination.

### **3.4 Event Responses**

A total of 23 surveys were collected at events, accounting for 17% of all surveys received. Close to 75% of visitors said 'no' it was not their first time visiting and 26% said 'yes'. The main reason for attending was 'day trip' (48%), while 27% said 'leisure' and 17% said 'visiting family and friends'. The most common theme for travel among visitors was 'agri-tourism/culinary' (96%).

Close to half the visitors rated their overall experience as '5 – Excellent', while 35% rated '4', and 9% rated '3' and '2'. For service received, 52% rated it was 'excellent' and 35% said 'good'. Of the 23 visitors, only 13% stayed overnight in paid accommodation, where 50% stayed for 'two nights' and 25% stayed 'one night' or '5 nights'.

Almost 40% of visitors found out about the event from a 'newspaper/magazine ad', while 35% found out by 'word of mouth'. The average group size was 'two people' or 'four people' by 26%, and 22% said 'one person'. Within the groups, the most common age ranges were 'age 46-65' and 'age 65+' among visitors. In addition, 57% said their group would spend 'under \$100'.

For overall impression, 39% of visitors rated 'fair' and 35% rated 'poor', while only 4% said 'excellent'. This distribution category had the lowest rating for overall impression; however, 87% said they would recommend the event to family and friends.

### **3.5 Visitor Information Centre Responses**

Visitor Information Centres collected 19 surveys, contributing 14% to total number of surveys received. Of the 19 visitors, 58% said 'no' it wasn't their first time visiting and 37% said 'yes'. Almost 40% said the main reason for their visit was 'day trip', followed by 32% for 'visiting family and friends' and 26% for 'vacation'. In addition, 47% said 'rocks and minerals' was the theme of their visit and 26% said 'outdoor recreation' or 'other'. Overall experience was rated by 53% as '5 – Excellent' and 84% rated the service they received as 'excellent'.

Half of the visitors stayed overnight in paid accommodations, where 56% stayed for 'one night', 22% stayed for 'more than five nights' and 11% stayed for 'two nights'. For marketing and promotion, 53% found out about the destination by 'word of mouth', followed by 17% who used 'Website/Twitter/Facebook' and 11% who said 'I live within the area'.

The common group size was 'two people' (63%), followed by 16% who said 'three people' or 'four people'. Within the groups, the common age range among 68% was 'age 46-65'. The most popular amount of spending for 53% of groups was '\$100 - \$499', while 21% said 'under \$100'. For overall impressions 32% of visitors rated 'excellent' and 'good', and 89% said they would recommend the destination to others.

## 4.0 Hastings County Beer Festival Results

### Performance Measures

- Beer Festival was well received with a rating score of 9.2 score out of 10. Over 60% scored it 10, 14% with 9, and 16% with 8.
- 85% of visitors were 'Very Likely' to return for the Beer Festival next year
- 92% were 'Very Likely' to recommend Beer Festival to friends and family
- Learning about Beer Festival was by 'Word of Mouth' (43%), 'radio' (20%) and 'newspaper' (23%)

### Tourism Generator

- 74% were from the local market (<40 km)
- Visitors visited a variety of other communities such as Belleville (25%) & Rideau (25%)

### Profile of Attendees

- 54% were between 25-44 with 22% from 45-54 cohort
- 55:45 female/male split
- Average party size of 3.8
- 93% Canadian

## 5.0 Elvis Festival Survey Results

Almost half the guests responding were Ontario residents from outside Hastings County. The next largest group of visitors represented was Tweed residents (23%). Over 60% of visitors rated their "Tweed Experience" as Hi (5 out of a possible 5), and over 65% of visitors rated the service received as Hi (5 out of a possible 5).

Over half of the visitors stated they 'returned home' or 'stayed with friends/family' while visiting our Festival. The majority (>60%) of visitors stated they heard of the festival through 'word of mouth'. On a scale of 1-5, almost 84% of visitors rated their festival experience as a "4" or "5". Twice as many rated it a "5" as those rating it a "4". 93% of visitors said they would/will recommend our Festival to family and friends, and almost 80% of visitors said they 'intend to return' to our event next year.

The most frequently reported negative dealt with the quality / variety of food available through our vendors. 30% of those responding requested a 'greater variety of foods', and 'more healthy choices'.

## 6.0 Recommendations for 2012 Tourism Survey

With the completion of the 2011 tourism survey collection period, feedback was received from participating distribution locations and other tourism industry stakeholders. Many stated there needs to be greater support from tourism businesses and to determine a way to ensure that communities are getting involved. The greatest level of responses were generated at accommodators, therefore more accommodators should be approached as distribution locations and encouraging participants from 2011 to continue distributing for 2012. It is recommended that at least one location in each of the municipalities within Hastings County has a business or organization distributing and collecting surveys.

Members of Hastings County's Premier-ranked Tourist Destination Working Group noted that there was a need for more volunteers at events collecting surveys. An example is the Bay of Quinte Country, who had a team of volunteers at events with clipboards. A similar approach should be developed for the 2012 collection period at festivals and events. At the 2011 events, volunteers found that visitors didn't want to spend the time to fill out a double sided survey, and that there were too many questions to answer, some of which were not applicable for the event. For 2012, it is necessary for more events and festivals to have the survey present, particularly events that focus on attracting visitors from outside Hastings County.

It is recommended that the 2012 survey questions for businesses and organizations remain the same as the previous year, and the design as well. However, revisions to the 2011 survey should be made to create a festivals and events specific survey, questions will include:

*Question #1: Where are you visiting from?*

*Question #2: Is this your first time attending this event?*

*Question #3: Did you stay overnight in paid accommodation? If yes, how many nights did you stay?*

*Question #4: How did you find out about this destination?*

*Question #5: How many people are in your group?*

*Question #6: On a scale of 1-5, how would you rate your overall experience at this event?*

*Other comments?*

*Question #7: Please provide your contact information if you are interested in being entered in a draw for a prize.*

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. The winner of the 2011 draw was drawn on December 9, 2011 and the gift basket was awarded to Janet Sutton from Pontypool, ON. It is recommended that a draw be used again as an incentive for 2012 and takes place at the end of year (December 2012). The gift basket should include items donated from local businesses to further promote Hastings County's tourism businesses and services.