



# Grey County Tourism Promotional Activities Geographical Analysis 2002-2009



The Resource Management Consulting Group

[www.rmccg.ca](http://www.rmccg.ca)

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## Methodology

- Collection of geographical data from prospects from variety of promotional activities over past years
- Promotional activities included:
  - Mail out of tourism information 2002-09
  - 2006 and 2007 contest entrants
- Overall Analysis
  - 15,590 postal codes cleaned, sorted using Excell and analyzed using SPSS according to country of origin and first digit of FSA (3-digit forward sortation area)
- Ontario Analysis
  - Postal codes for Southern Ontario sorted further according to FSA and Ontario Tourism Regions

## Comments and Recommendations

- This analysis has provided some useful information regarding the reach of Grey County's marketing efforts
- There is reasonable consistency among three data sources: postal codes from mailings and contests, the 2009 visitor survey and the 2007 Ontario Regional Tourism Profile data
- Analyzing the data has been a very cumbersome task, largely because of the huge volume of data and inconsistent data entry
- To improve this situation, we can work with you to
  1. Develop templates (either Excel or online form) to capture geographic information consistently from all sources (online, e-mail, telephone)
  2. Decide how you want to use the information, to ensure that the information you need is collected consistently from this point forward
  3. Set a regular schedule annual? quarterly? for downloading and analyzing the geographical data

## Overall Geographical Analysis

- **Canada (82% Ontario + 5% other Canada = 87%)**

*(detailed analysis p4)*

- Within the Canadian market Grey is primarily reaching
  - Southwestern Ontario (49%)
  - Central Ontario(28%) and
  - Toronto (12%) markets
- Eastern Ontario, Eastern Canada, Quebec and western provinces still small markets

- **United States (12%)**

*(detailed analysis p5)*

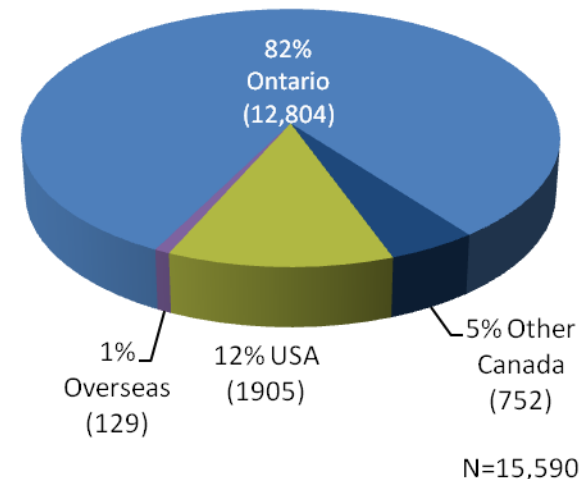
- Michigan dominates with 64% of the promotion, showing a steady 7% annual increase
- Other neighbouring states weak
- Interesting...
  - Curious about interest by deep southern states (snowbirds?)
  - U.S. contests seemed to have a nation-wide participation (48% other states), but in Canada contest participation matched mailout patterns

- **Overseas (1%)**

*(detailed analysis p6)*

- Europe dominates at participation of 80%
- Asia has a small presence
- Recognize the numbers of overseas prospects was small

**Markets of All Grey County Promotional Activities 2002-2009**



## Overall Geographical Analysis - Canada

|                    |       | Mailouts      |               |               | Contests      |               |
|--------------------|-------|---------------|---------------|---------------|---------------|---------------|
|                    |       | 2002-07       | 2008          | 2009          | 2006-7        | Total         |
| <b>Que + East</b>  | Count | 77            | 12            | 25            | 75            | 189           |
|                    | %     | 1.9%          | 1.2%          | 3.5%          | 1.0%          | 1.4%          |
| <b>Toronto (M)</b> | Count | 632           | 125           | 91            | 744           | 1592          |
|                    | %     | <b>15.3%</b>  | <b>13.0%</b>  | <b>12.6%</b>  | <b>9.6%</b>   | <b>11.7%</b>  |
| <b>C Ont (L)</b>   | Count | 1319          | 318           | 264           | 1883          | 3784          |
|                    | %     | <b>31.9%</b>  | <b>33.1%</b>  | <b>36.7%</b>  | <b>24.3%</b>  | <b>27.9%</b>  |
| <b>SW Ont (N)</b>  | Count | 1706          | 417           | 277           | 4270          | 6670          |
|                    | %     | <b>41.2%</b>  | <b>43.4%</b>  | <b>38.5%</b>  | <b>55.2%</b>  | <b>49.2%</b>  |
| <b>E Ont (K)</b>   | Count | 171           | 49            | 41            | 240           | 501           |
|                    | %     | 4.1%          | 5.1%          | 5.7%          | 3.1%          | 3.7%          |
| <b>N Ont (P)</b>   | Count | 98            | 19            | 5             | 135           | 257           |
|                    | %     | 2.4%          | 2.0%          | .7%           | 1.7%          | 1.9%          |
| <b>West</b>        | Count | 82            | 13            | 7             | 243           | 345           |
|                    | %     | 2.0%          | 1.4%          | 1.0%          | 3.1%          | 2.5%          |
| <b>Total</b>       | Count | <b>4137</b>   | <b>961</b>    | <b>720</b>    | <b>7738</b>   | <b>13556</b>  |
|                    | %     | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> |

## Overall Geographical Analysis - USA

|              |       | 02-07         | Mailouts<br>2008 | 2009          | Contests<br>2006-7 | Total         |
|--------------|-------|---------------|------------------|---------------|--------------------|---------------|
| <b>CA</b>    | Count | 27            | 2                | 2             | 19                 | 50            |
|              | %     | 2.3%          | 1.0%             | .8%           | 6.6%               | 2.6%          |
| <b>FL</b>    | Count | 24            | 4                | 7             | 20                 | 55            |
|              | %     | 2.1%          | 2.0%             | 2.6%          | 6.9%               | 2.9%          |
| <b>IL</b>    | Count | 21            | 6                | 2             | 7                  | 36            |
|              | %     | 1.8%          | 3.1%             | .8%           | 2.4%               | 1.9%          |
| <b>IN</b>    | Count | 12            | 1                | 1             | 6                  | 20            |
|              | %     | 1.0%          | .5%              | .4%           | 2.1%               | 1.0%          |
| <b>MI</b>    | Count | 814           | 152              | 224           | 31                 | 1221          |
|              | %     | <b>70.5%</b>  | <b>77.6%</b>     | <b>84.5%</b>  | <b>10.7%</b>       | <b>64.1%</b>  |
| <b>NY</b>    | Count | 31            | 3                | 7             | 21                 | 62            |
|              | %     | 2.7%          | 1.5%             | 2.6%          | 7.3%               | 3.3%          |
| <b>OH</b>    | Count | 75            | 7                | 3             | 14                 | 99            |
|              | %     | 6.5%          | 3.6%             | 1.1%          | 4.8%               | 5.2%          |
| <b>PA</b>    | Count | 13            | 1                | 0             | 15                 | 29            |
|              | %     | 1.1%          | .5%              | .0%           | 5.2%               | 1.5%          |
| <b>TX</b>    | Count | 12            | 3                | 0             | 18                 | 33            |
|              | %     | 1.0%          | 1.5%             | .0%           | 6.2%               | 1.7%          |
| <b>Other</b> | Count | 126           | 17               | 19            | <b>138</b>         | 300           |
|              | %     | 10.9%         | 8.7%             | 7.2%          | <b>47.8%</b>       | 15.8%         |
| <b>Total</b> | Count | <b>1155</b>   | <b>196</b>       | <b>265</b>    | <b>289</b>         | <b>1905</b>   |
|              | %     | <b>100.0%</b> | <b>100.0%</b>    | <b>100.0%</b> | <b>100.0%</b>      | <b>100.0%</b> |



## Overall Geographical Analysis - Overseas

|                    |       | 2002-07      | Mailouts<br>2008 | 2009         | Contests<br>2006-7 | Total        |
|--------------------|-------|--------------|------------------|--------------|--------------------|--------------|
| <b>Australia</b>   | Count | 0            | 3                | 1            | 0                  | 4            |
|                    | %     | 0%           | 12.0%            | 10.0%        | 0%                 | 3.1%         |
| <b>Asia</b>        | Count | 13           | 0                | 2            | 0                  | 15           |
|                    | %     | 14.1%        | 0%               | 20%          | 0%                 | 11.6%        |
| <b>Europe</b>      | Count | <b>74</b>    | <b>22</b>        | <b>6</b>     | <b>1</b>           | <b>103</b>   |
|                    | %     | <b>79.6%</b> | <b>88.0%</b>     | <b>60.0%</b> | <b>100.0%</b>      | <b>79.8%</b> |
| <b>Africa</b>      | Count | 3            | 0                | 0            | 0                  | 3            |
| <b>Middle East</b> | %     | 3.2%         | 0%               | 0%           | 0%                 | 2.3%         |
| <b>S America</b>   | Count | 3            | 0                | 1            | 0                  | 4            |
| <b>Caribbean</b>   | %     | 3.2%         | 0%               | 10.0%        | 0%                 | 3.1%         |
| <b>Total</b>       | Count | 93           | 25               | 10           | 1                  | 129          |
|                    | %     | 100.0%       | 100.0%           | 100.0%       | 100.0%             | 100.0%       |

## Overall Geographical Analysis - An Interesting Comparison

- This table compares the residence locations using three different information sources
- There are differences in the numbers, but they make sense
  - Canada is the primary source of visitors
  - The 2009 survey may oversample USA and Overseas visitors because the survey took place at visitor centres and major attractions
  - The Geographical analysis may oversample US visitors because it is based on inquiries and contests, not actually visitors on the ground. Good to know Americans are interested.

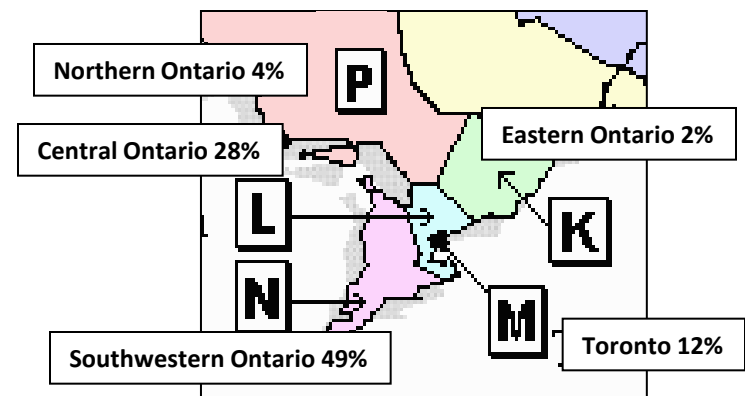
|          | 2009 Grey County Survey | 2002-9 Geog Analysis | 2007 Regional Tourism Profile* |
|----------|-------------------------|----------------------|--------------------------------|
| Canadian | 86%                     | 87%                  | 96%                            |
| USA      | 6%                      | 12%                  | 3%                             |
| Overseas | 8%                      | 1%                   | 1%                             |

\* Source: Statistics Canada, Travel Survey of Residents of Canada and International Travel Survey, 2007

## Ontario Geography of Grey Tourism's Promotional Efforts

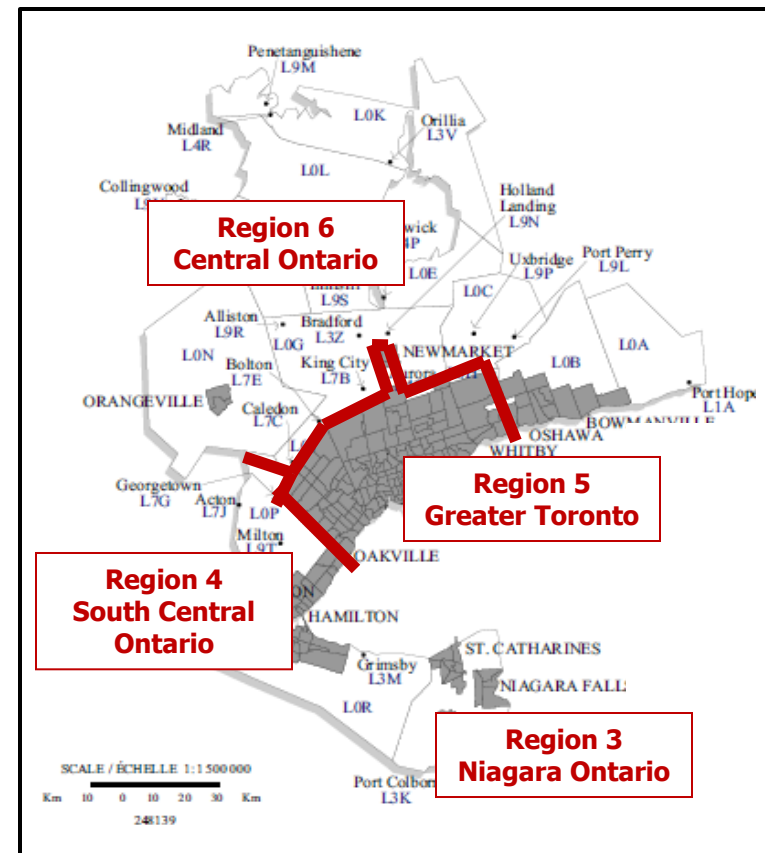
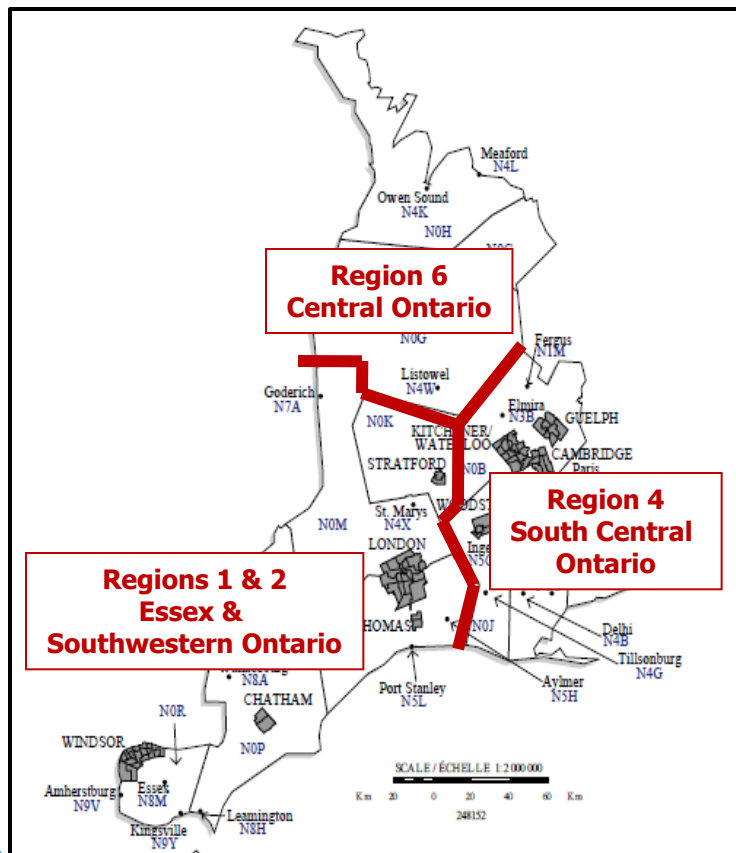
Drawn from page 4, percentage of Canadian residents

- The vast majority of Canadian residents came from Central and Southwestern Ontario and Toronto
- However, a more detailed analysis is needed to determine the geographical distribution of these residents.
- In the following pages, the FSAs are related to Ontario's tourism regions and the distribution of residents across the tourism regions is analyzed and presented.



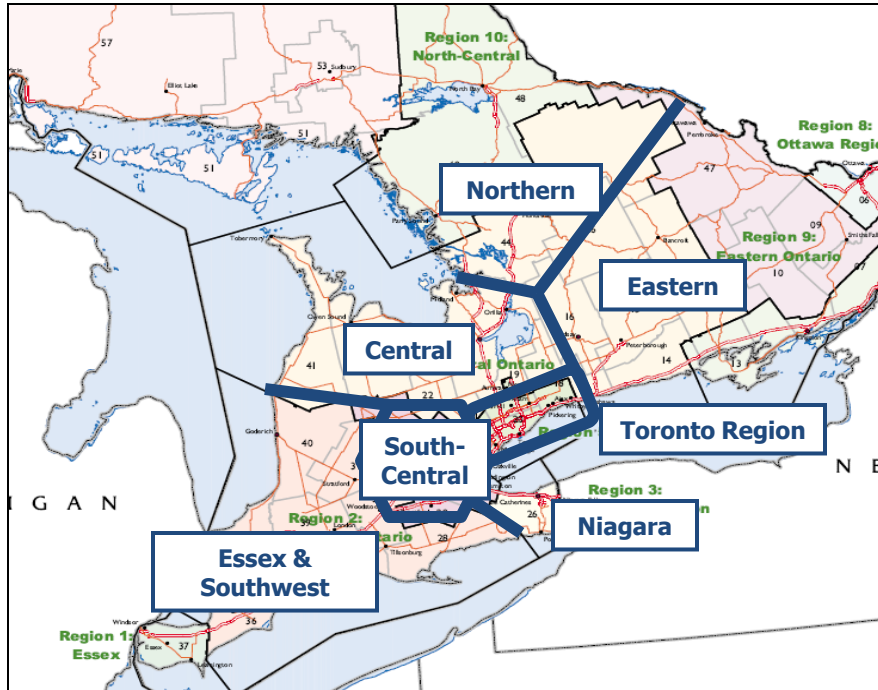
## Ontario Geography of Grey Tourism's Promotional Efforts

- To better understand the Ontario geographical distribution, the 3-digit FSAs for L, M and N were assigned to the corresponding Ontario Tourism Regions

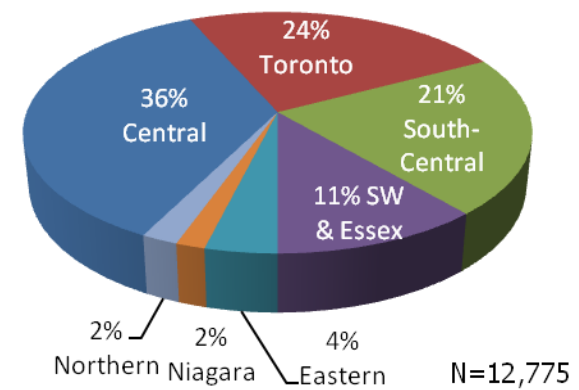


## Ontario Geography of Grey Tourism's Promotional Efforts

- This resulted in 7 geographic regions for Ontario that are a combination of tourism regions (close to Grey County) and first digit of FSA (further away)



| Region        | Count         | Percent     |
|---------------|---------------|-------------|
| Central       | 4,580         | 36%         |
| Toronto       | 3,053         | 24%         |
| South-Central | 2,722         | 21%         |
| Essex and SW  | 1,449         | 11%         |
| Eastern       | 500           | 4%          |
| Niagara       | 203           | 2%          |
| Northern      | 255           | 2%          |
| <b>Total</b>  | <b>12,775</b> | <b>100%</b> |



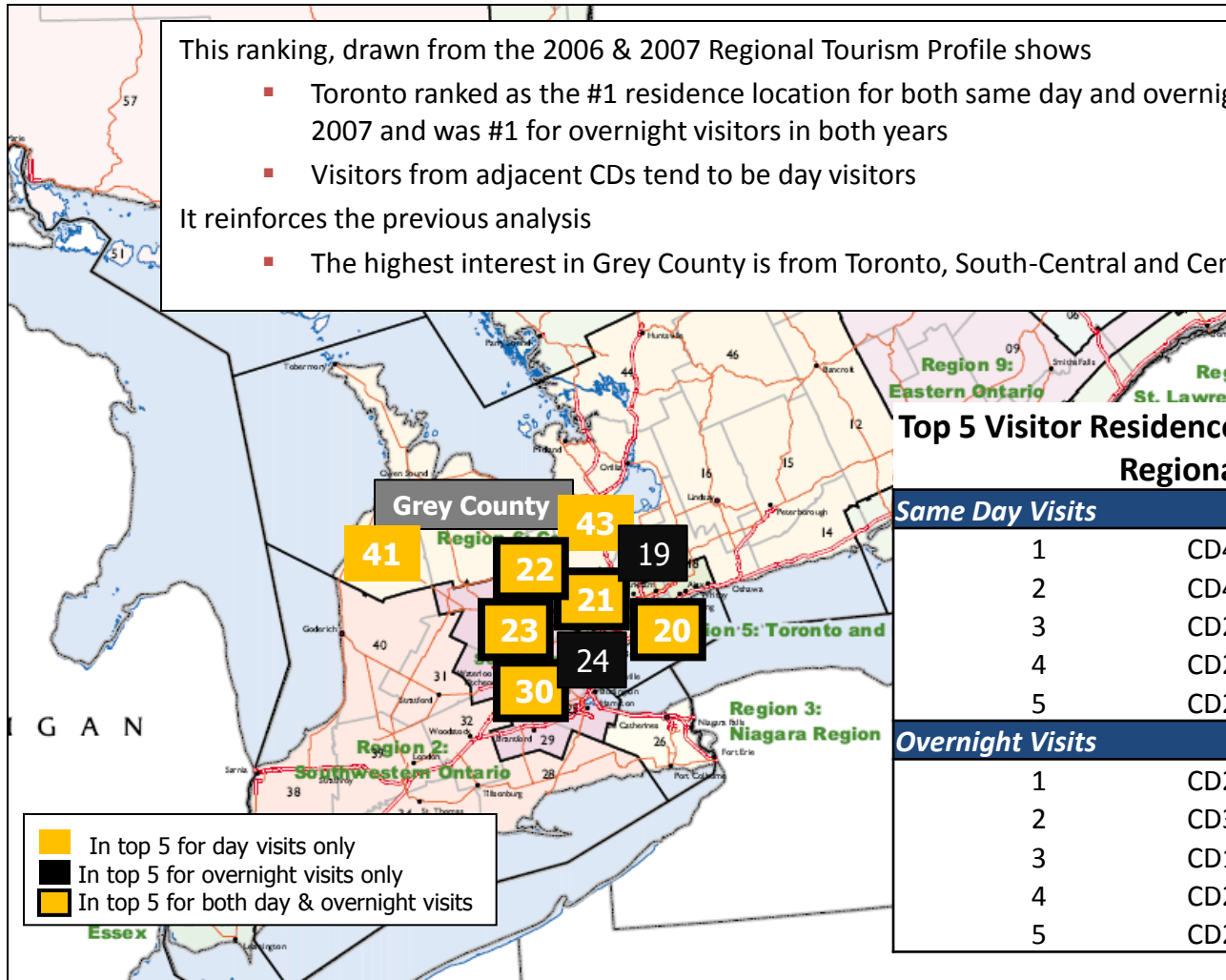
## Another interesting comparison

This ranking, drawn from the 2006 & 2007 Regional Tourism Profile shows

- Toronto ranked as the #1 residence location for both same day and overnight visitors in 2007 and was #1 for overnight visitors in both years
- Visitors from adjacent CDs tend to be day visitors

It reinforces the previous analysis

- The highest interest in Grey County is from Toronto, South-Central and Central Ontario



### Top 5 Visitor Residence Locations for Grey Visitors from Regional Tourism Profiles

|                         | 2006            | 2007          |
|-------------------------|-----------------|---------------|
| <b>Same Day Visits</b>  |                 |               |
| 1                       | CD43 Simcoe     | CD 20 Toronto |
| 2                       | CD41 Bruce      | CD41 Bruce    |
| 3                       | CD20 Toronto    | CD30 Waterloo |
| 4                       | CD23 Wellington | CD43 Simcoe   |
| 5                       | CD21 Peel       | CD22 Dufferin |
| <b>Overnight Visits</b> |                 |               |
| 1                       | CD20 Toronto    | CD20 Toronto  |
| 2                       | CD30 Waterloo   | CD21 Peel     |
| 3                       | CD19 York       | CD24 Halton   |
| 4                       | CD23 Wellington | CD19 York     |
| 5                       | CD21 Peel       | CD30 Waterloo |