
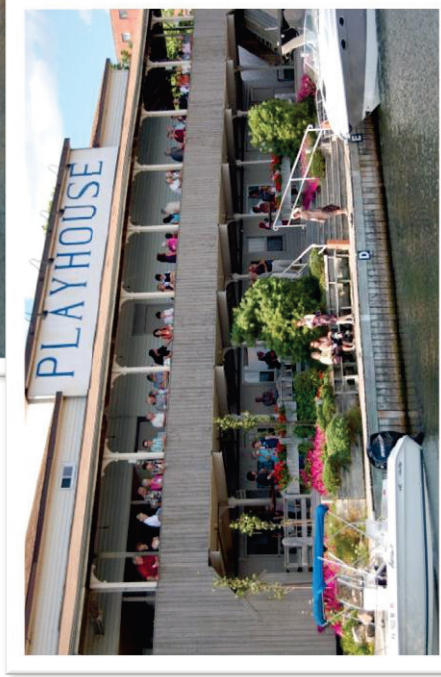
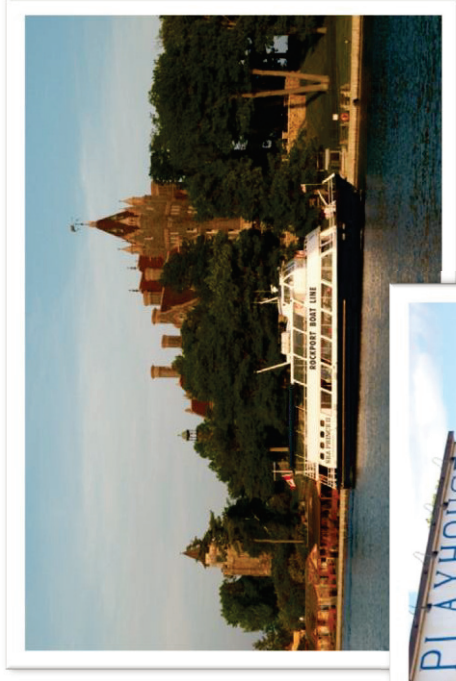




# 1000 Islands Gananoque Subregion Visitor Tracking 2012

Prepared for  
**The Great Waterway  
Regional Tourism Organization**

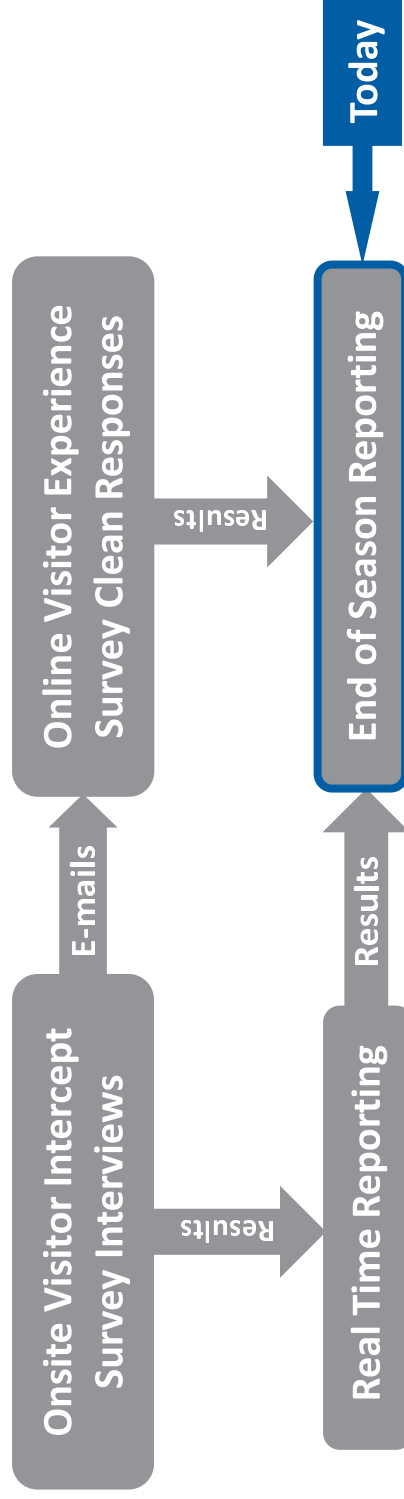
Prepared by  
The Resource Management  
Consulting Group



November 2012

# 2012 TGW Visitor Tracking Project

- ✓ Consistent, statistically representative summer visitor data across TGW
- ✓ Solid understanding and benchmarking of visitor behaviour, characteristics, and satisfaction



- ✓ Large enough sample to analyze visitor subgroups for both onsite and online survey
  - Sample of 400+ needed for statistically reliable patterns
  - Sample of 200-400 not statistically reliable, for direction only
  - Sample less than 200 not reliable

**1000 Islands  
Gananoque**

# Interviews in 8 Subregions across TGW 4 Interview Sites in 1000 Islands Gananoque

- TGW hired 8 Interviewers (one for each subregion)
- May to September



# Onsite Visitor Intercept Survey

May-September 2012

Survey Basics | Great Waterway Ma

### The Great Waterway Visitor Intercept Survey

1. Where is your primary destination on this trip?

The Great Waterway

Ottawa area

Other Ontario

Quebec

Atlantic Canada

Western Canada

U.S.A.

2. During this trip, what are you staying for the day or overnight in the Great Waterway?

Day only

Overnight

3. How many nights/length of stay are you staying?

1 2 3 4 5 6 7 8 9 10+

4. In this year, how often do you visit the Great Waterway?

First time

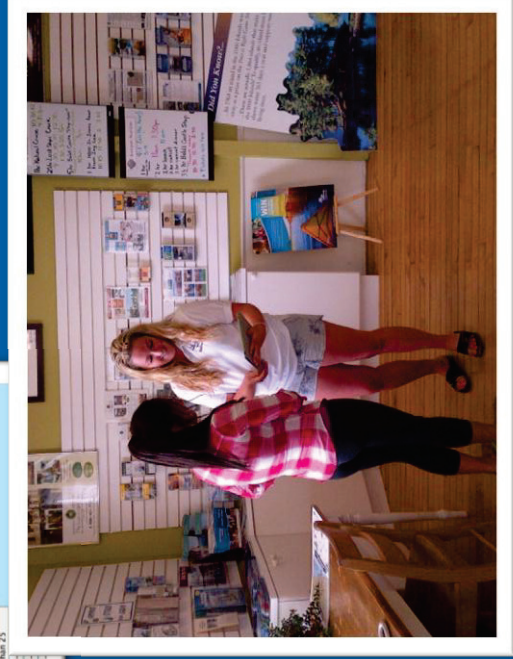
Repeat visitor

5. Which of the following age categories do you fall into?

Less than 25

25-35

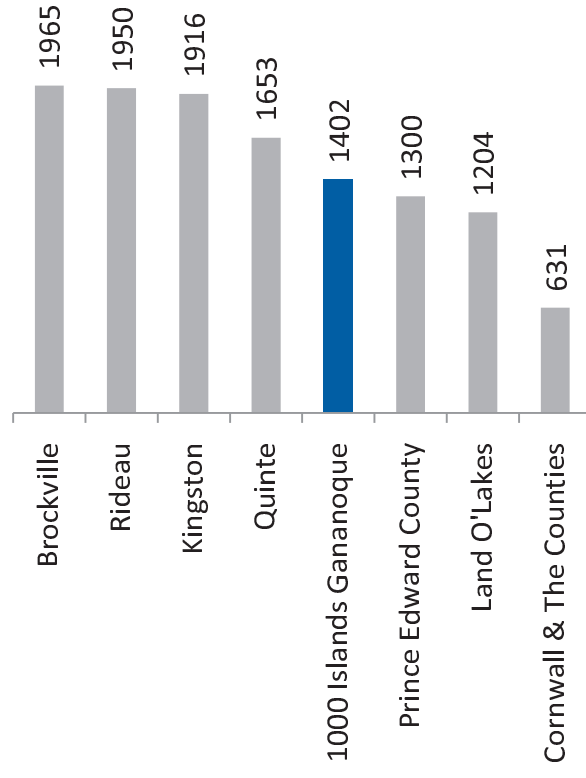
35-45



# 12,044 Interviews in 8 Subregions

- ✓ TGW Project Targets  
→ 12,000 interviews
- ✓ Exceeded overall TGW target  
→ Final sample 12,044
- ✓ Subregion targets  
→ 1,500 interviews
- ✓ **Very close to the target**  
→ **Final sample 1,402**

Visitors Interviewed by Subregion  
Unweighted (May-September 2012)



# Onsite Intercept Survey Results

Variable	1000 Is Gan n=1,402	TGW n=12,044 Weighted
<b>TGW primary destination</b>	<b>68%</b>	<b>82%</b>
First time visitors	52%	37%
Overnight visitors	66%	61%
Nights (avg)	3.4	4.1
Average party size	3.1	3.0
Travelling with children	25%	27%
Canadian residents	69%	77%
<i>Eastern Ontario</i>	22%	32%
<i>Central Ontario</i>	18%	24%
<i>Quebec</i>	18%	13%
International residents	31%	23%
USA	16%	14%
Europe	12%	6%
Canadians not born in Canada	17%	12%
<i>Born in Europe</i>	6%	4%
<i>Born in Asia</i>	4%	2%

## n-value

- n is the number of respondents .
- Provided on all charts & tables that give % of respondents.

## Overall TGW responses to the Onsite and Online were weighted throughout this report to represent geographic visitation patterns:

1. Sample bias was eliminated by giving all subregions equal weight.
2. Subregion visitation patterns were based on Intercept Survey Q2 (Where did you spend most time in TGW?).
3. Subregion Weight Factors were calculated and applied to overall Online Survey Responses.

# Online Visitor Experience Survey

May-September 2012



Recently, you visited the part of Eastern Ontario known as The Great Waterway and you were invited to provide us with your feedback about your visit. Your email address was provided with your permission so that we could contact you with information about the survey and to remind you to complete it. We are now ready to begin the survey and we are looking for your input.

This survey is a short survey that takes about 5-8 minutes of your time. Please be assured that your responses will be kept in confidence and your name will not be shared with Your Own Great Waterway Getaway.\*

On behalf of The Great Waterway, thank you for your visit and for providing us with your feedback. We are looking forward to The Great Waterway's memorable experiences and we are looking forward to your input so that we can continue to improve the visitor experience in more of our beautiful region.

**Lobby Smith**  
Executive Director



Récemment, vous avez visité la région de l'Est de l'Ontario aussi connue sous le nom de la Grande Voie d'Eau. Vous avez été invité à nous fournir vos commentaires sur votre expérience de la Grande Voie d'Eau à propos de votre visite. Votre adresse électronique a été fournie avec votre autorisation afin que nous puissions vous contacter à propos de la recherche et vous encourager à participer à cette recherche importante.

Il vous faudra environ 5 à 8 minutes pour compléter ce sondage. Soyez assuré(e) que vos réponses seront gardées confidentielles. En outre, votre nom ne sera pas communiqué à la Grande Voie d'Eau. Nous sommes très intéressés à connaître votre avis sur votre expérience de la Grande Voie d'Eau et nous espérons que vous aurez l'occasion de partager votre propre expérience de la Grande Voie d'Eau dans la région de la Grande Voie d'Eau.

Au nom de la Grande Voie d'Eau, nous vous remercions de votre visite et de nous avoir fourni vos commentaires. Nous sommes très intéressés à connaître votre avis sur votre expérience de la Grande Voie d'Eau et nous espérons que vous aurez l'occasion de partager votre propre expérience de la Grande Voie d'Eau dans la région de la Grande Voie d'Eau.

**Lobby Smith**  
Directeur Exécutif



**YOUR TRIP TO THE GREAT WATERWAY**

**Visitor Experience Survey - Final**

4. Tell us about your experiences in The Great Waterway by selecting ALL the Outdoor Activities you participated in during this trip...

- Fishing
- Birding (or Photo)
- Picnicking
- Hiking
- Kayaking
- Canoeing
- Horseback Riding
- Bicycling
- Swimming
- Golf
- Hunting
- Other (please specify): \_\_\_\_\_

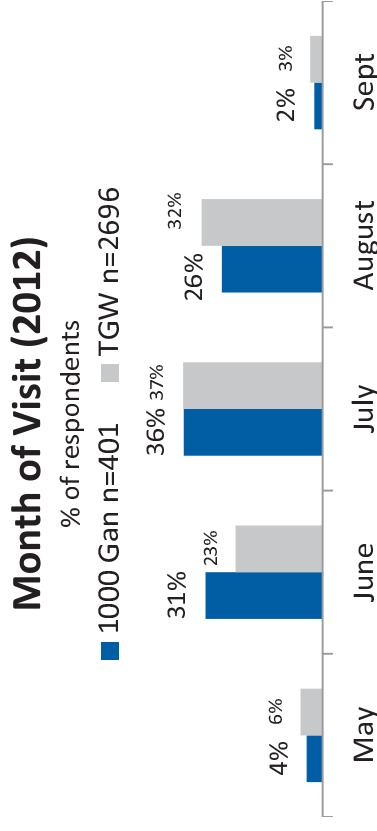
None

Other (please specify): \_\_\_\_\_



# Visitor Sample for TGW & 1000 Islands Gananoque Similar

- Visitation covered period from mid-May to first weekend in September 2012
- 1000 Islands Gananoque sample a little larger in June and a little smaller in August



## TGW

- 8,010 email invitations were sent to TGW visitors (within one month of visit to TGW)
- Response rate was 34% (2,696 responses)
- Screened out local respondents (<40km)
- Sample large enough to statistically represent Visitors to TGW

## 1000 Islands Gananoque

- 1042 email invitations sent to 1000 Islands Gananoque visitors
- Response rate 38% (401)
- Screened out local respondents <40 km
- Excellent statistically representative sample



# 1000 Is Gananoque Visitors Similar to TGW Overall

- **95% independent travelers** (TGW 96%)
- **20% travelled with children** (TGW 25%)

- **62% post-secondary education** (TGW 64%)

- **Similar age (between 45-64)**

- 1000 Gan 55%
- TGW 60%

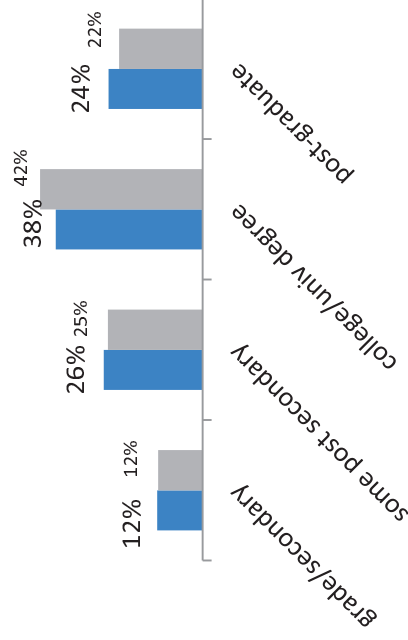
- **Similar average party size**

- 1000 Gan 2.9
- TGW 3.1

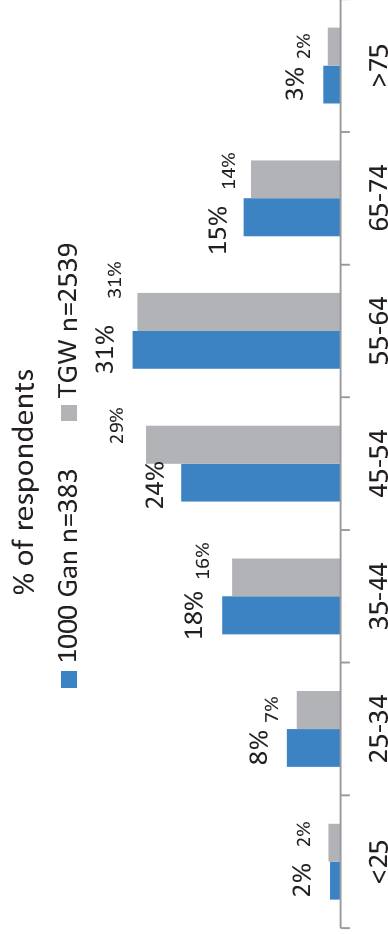
- **Female : Male Ratio**

- 1000 Gan 52:48
- TGW 55:45

**Education**  
% of respondents  
■ 1000 Gan n=381 ■ TGW n=2516

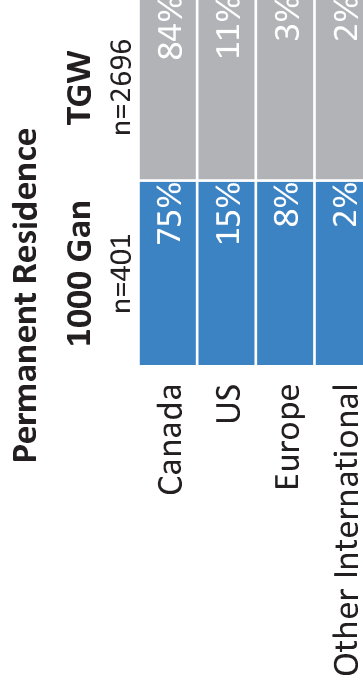
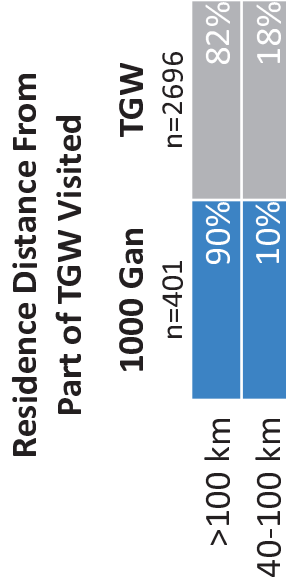


**Age**  
% of respondents  
■ 1000 Gan n=383 ■ TGW n=2539



# More International Visitors than TGW

- More visitors came from >100 km (90%) compared to TGW overall (82%)
- 1000 Islands Gananoque had a higher proportion of International visitors (25%) (TGW 16%), with 15% from US (TGW 11%) and 8% from Europe (TGW 3%)



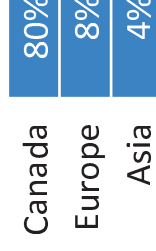
# Canadian Residents not born in Canada

- 20% of 1000 Islands Gananoque Canadian residents were not born in Canada (TGW 15%)
- 8% were born in Europe (TGW same) and 4% in Asia (TGW 2%)
- Most had lived in Canada >10 years (TGW same)

**Canadian Residents' Birthplace**

(1000 Gan visitors)

% of Canadian resident respondents n=288



# Canadian Visitor Market

- 1000 Islands Gananoque attracted fewer visitors from Eastern Ontario (K postal code) than TGW overall

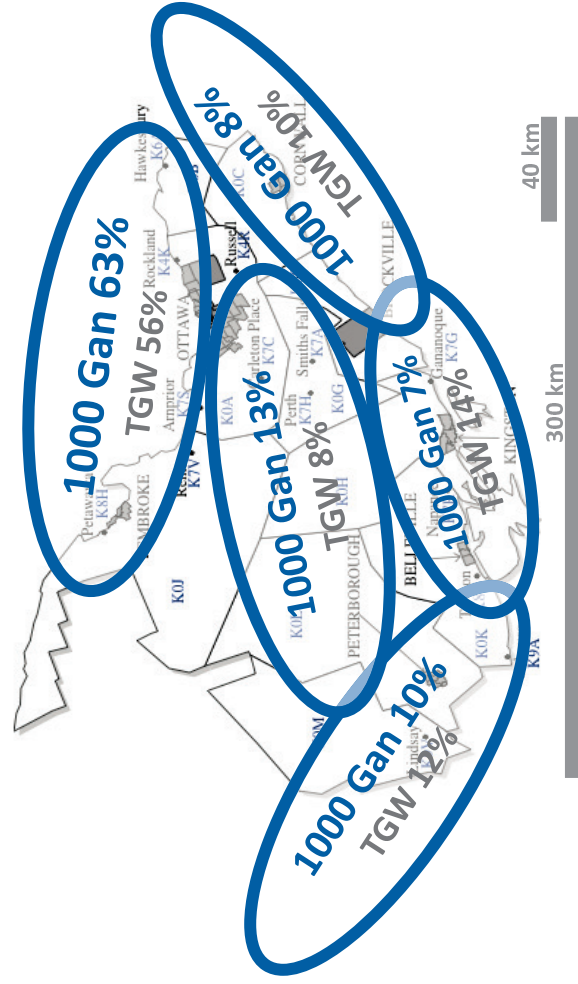
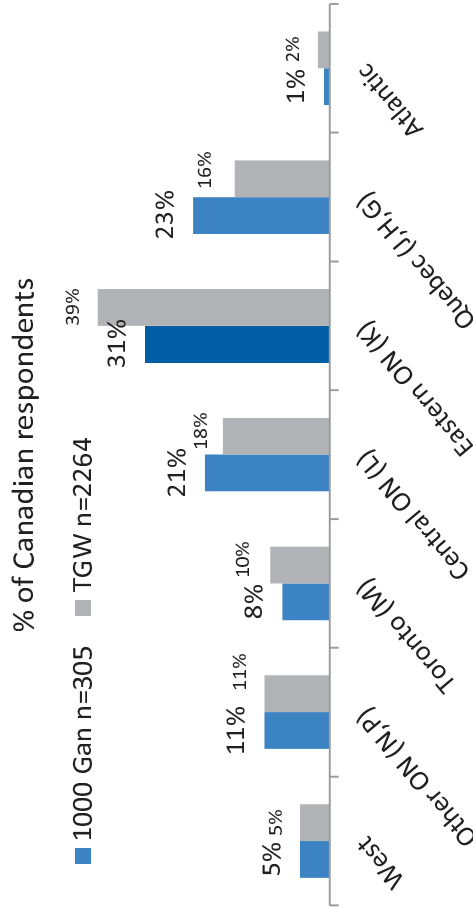
- 1000 Is Gan 31%
- TGW 39%

- And more visitors from Quebec and Central Ontario

- Of the visitors to 1000 Islands Gananoque from Eastern Ontario (K postal code)

- 73% came from outside of the TGW
  - Ottawa/Pembroke – 63%
  - Peterborough/Lindsay - 10%

## Postal Code



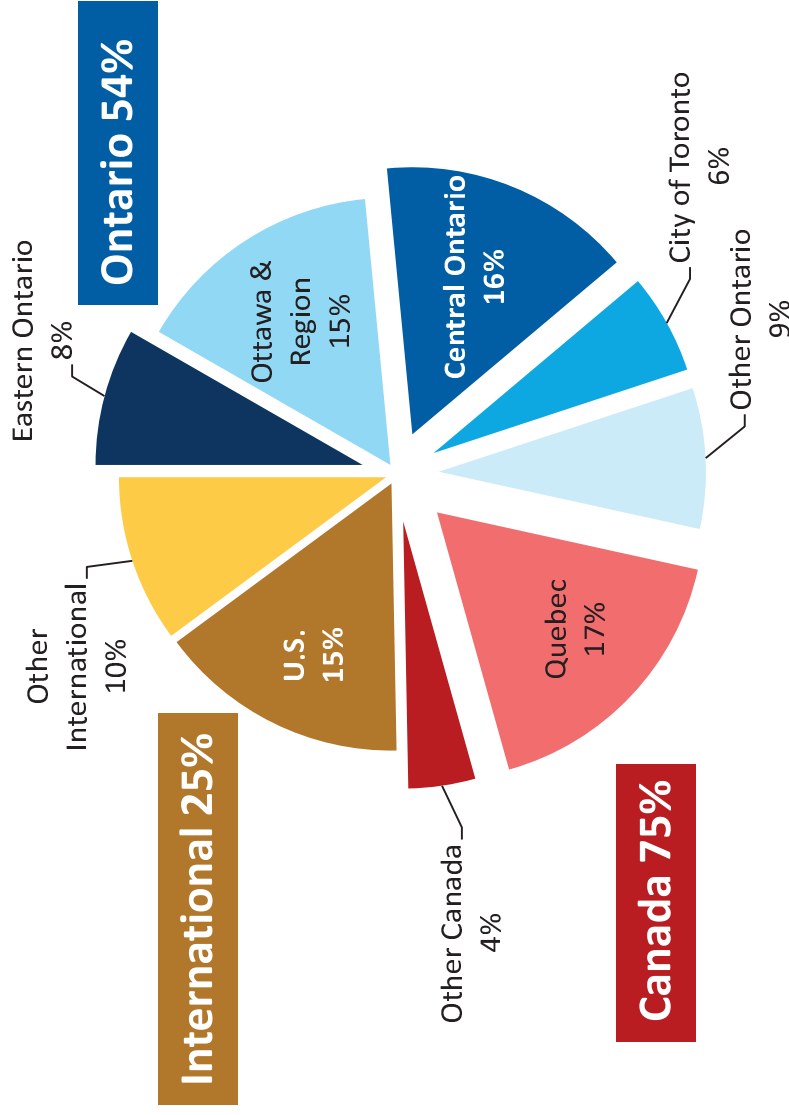
TGW weighted responses

# Overall Market Geography for 1000 Islands Gananoque Different than TGW

- 25% of all respondents were International (TGW 16%)
- 54% were from Ontario (TGW 65%)
- 23% were from the Ottawa region & Eastern Ontario (TGW 32%)
- 22% from Central Ontario & City of Toronto (TGW 24%)
- 17% were from Quebec (TGW 13%)

## Permanent Residence of 1000 Gan Visitors

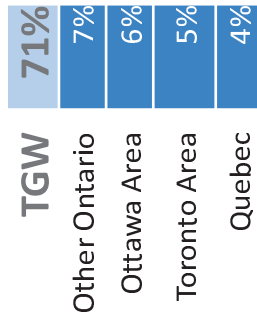
% of respondents n=401



TGW weighted responses

# TGW a Destination, Strong Repeat Visitation

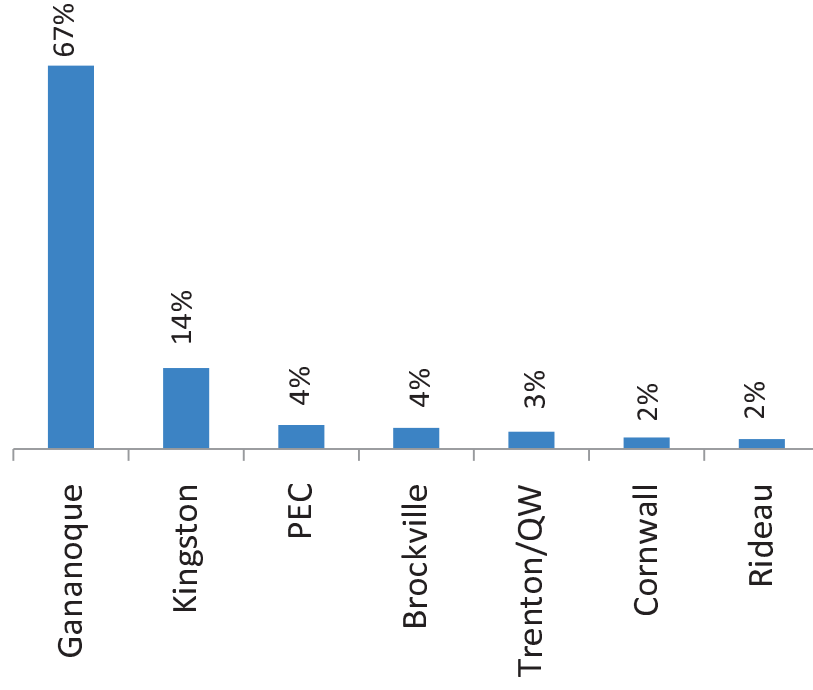
**Primary Destination**  
% of respondents n=399



**Visits to TGW in Past 5 Years**  
% of respondents n=399



**TGW Community Where 1000 Gan Visitors Spent Most Time**  
% of respondents n=401



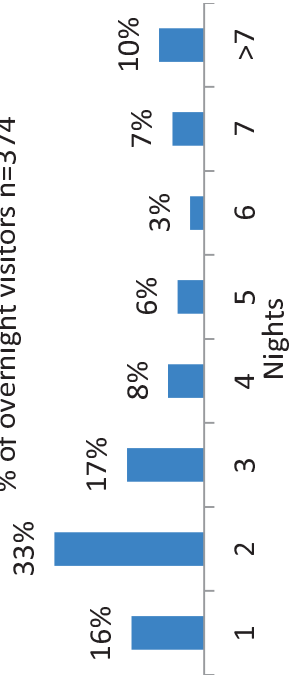
- **TGW was the primary destination for 71% of respondents, the remainder were passing through (TGW 76%)**
- **41% were first time visitors, higher than TGW market (25%)**
- **Repeat visitation was lower than TGW (32% visited >3 times in past 5 years) (TGW 46%)**
- **Gananoque was the primary TGW destination for 67% of visitors (overall TGW visitors spent most time in Kingston and PEC)**

TGW weighted responses

# Overnight Visitation

## Number of Nights

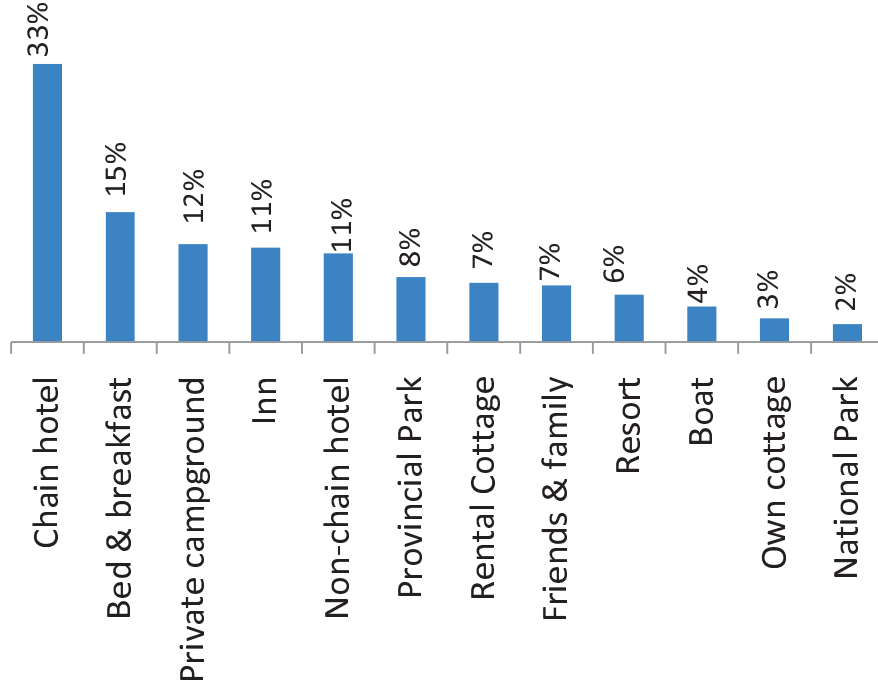
% of overnight visitors n=374



- **72% of respondents stayed overnight (TGW same)**
- **Of the overnight visitors**
  - **Average stay 4.2 nights (TGW 4.8)**
  - **49% stayed 1-2 nights (TGW 44%)**
  - **17% stayed a week or more (TGW 19%)**
- **33% stayed in a chain hotel (TGW 32%)**
- **15% stayed in a bed & breakfast (TGW 11%)**
- **12% stayed in a private campground (8% TGW)**
- **11% stayed an inn and 11% stay at a non-chain hotel (TGW 6%, 11%)**
- **7% stayed with friends and family (TGW 14%)**

## Accommodation

% of overnight visitors n=399



# Outdoors, Culture & Wine Experiences

- 89% visited for pleasure and 8% to spend time with friends and relatives (TGW 66% pleasure, 26% VFR)
- 85% participated in outdoor experiences during their visit (TGW same), 70% participated in cultural experiences (TGW 78%) (experiences listed on next slides)
- 71% ate local food and drank the local wine, while 42% enjoyed unique shopping opportunities (similar to TGW for both)
- 10% visited a casino (TGW 5%)
- Average expenditure during the party's entire visit to TGW was \$698 (n=378) (TGW \$727)

	1000 Gan n=393-398	TGW n=2640-60
Outdoors	85%	85%
Cultural	70%	78%
Local Food & Wine	71%	72%
Unique Shopping	42%	46%
Casino	10%	5%



# Time Spent Outdoors

- 85% of 1000 Islands Gananoque visitors participated in outdoor experiences (TGW same)
- More (58%) went on a boat cruise (TGW 32%)
- And similar proportions participated in nature experiences (33%), swimming (21%) and hiking (20%) (TGW 33%, 25%, 20%)

## Participation in Experiences

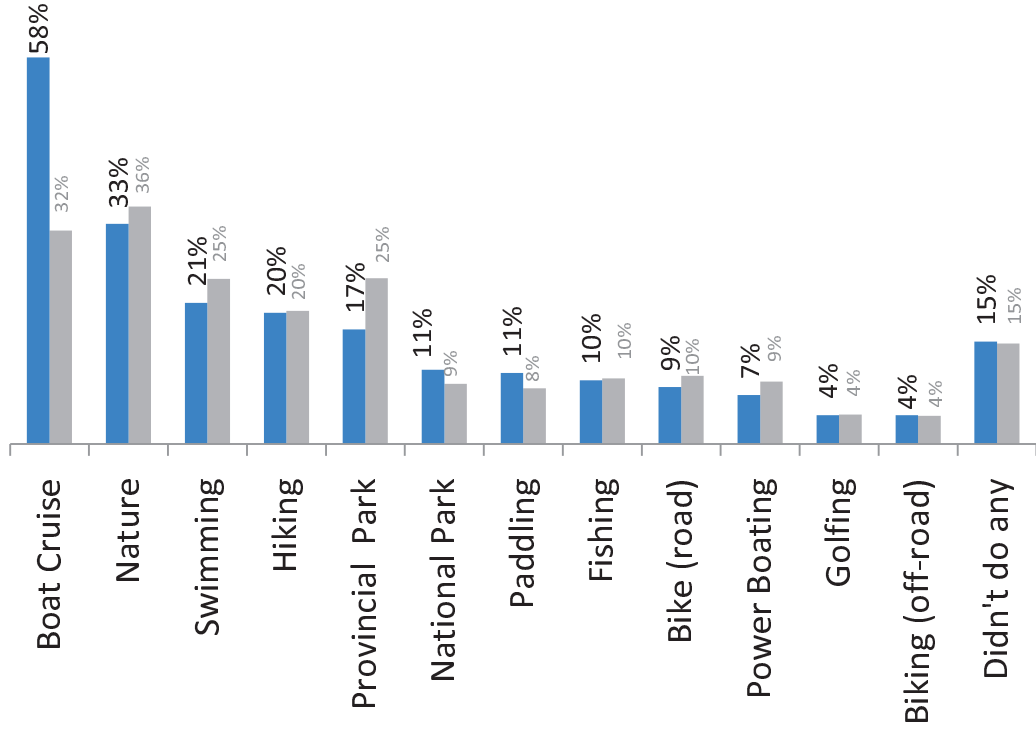
	1000 Gan n=393-398	TGW n=2640-60
Outdoors	85%	85%
Cultural	70%	78%
Local Food & Wine	71%	72%
Unique Shopping	42%	46%
Casino	10%	5%

## Outdoor Experiences

South Eastern Ontario

% of respondents

■ 1000 Gan n=398 ■ TGW n=2660



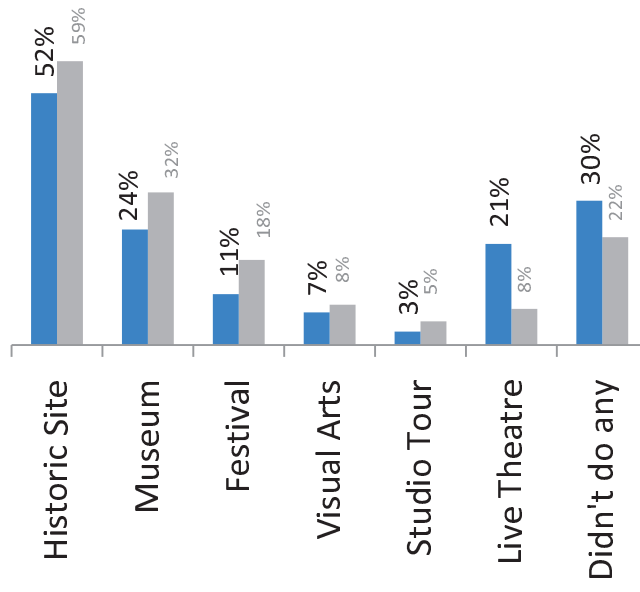
# Variety of Cultural Experiences

- Fewer 1000 Islands Gananoque visitors took in cultural experiences (70%) than TGW overall (78%)
- Most visitors went to historic sites (52%) and museums (24%) (TGW similar, 59% & 32%)
- 21% went to live theatre (10% of interviews were at the Thousand Islands Playhouse) (TGW 8%)

## Cultural Experiences

% of respondents

■ 1000 Gan n=396 ■ TGW n=2643



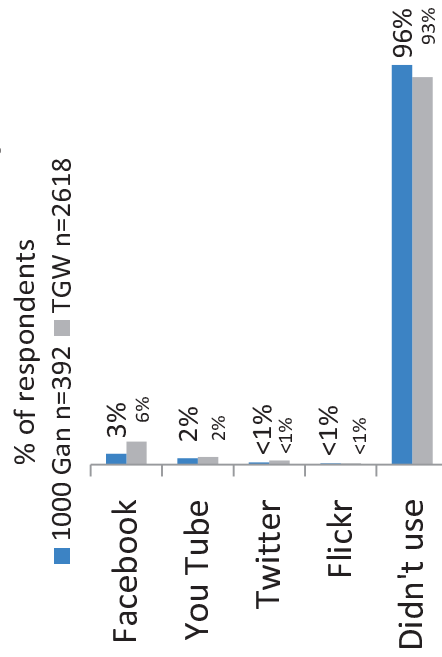
## Participation in Experiences

	1000 Gan n=393-398	TGW n=2640-60
Outdoors	85%	85%
Cultural	70%	78%
Local Food & Wine	71%	72%
Unique Shopping	42%	46%
Casino	10%	5%

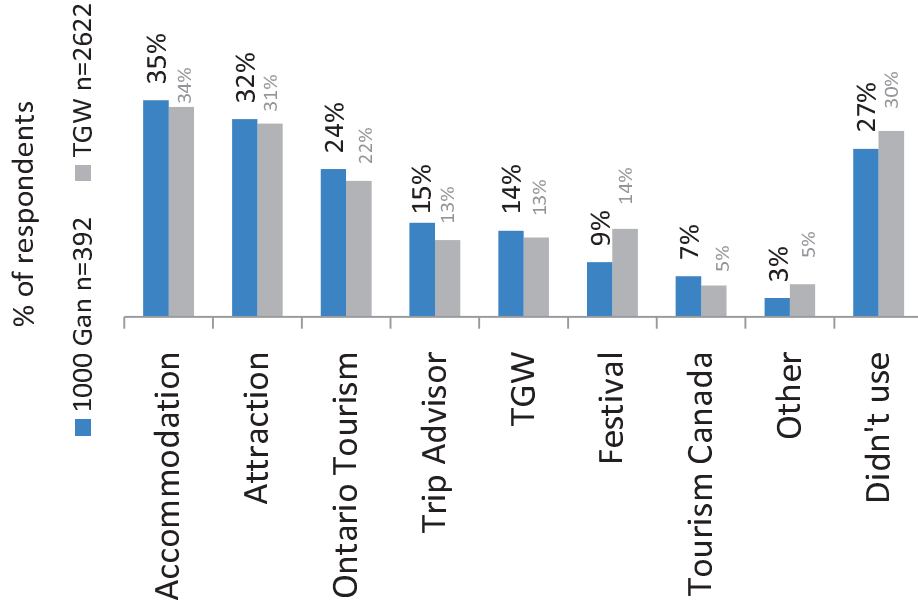
# Internet Used Extensively Social Media Just Beginning

- 73% used the internet to plan their trip, similar to TGW overall (70%)
- 14% used the TGW website (TGW 13%)
- Social media still young with only 4% using social media to plan their trips (TGW same)

## Social Media To Plan Trip



## Websites Used To Plan Trip



## VICs Influence Visitors' Decisions

- Of the 296 1000 Islands Gananoque visitors who stopped at a visitor information centre within TGW during their trip, 90% stopped at the Gananoque VIC, and 16% stopped at Kingston VIC
- 55% of those that visited a VIC, decided to stop at an attraction or event as a result of information received (TGW 56%), while 6% decided to extend their trips (TGW 9%)

### Influence of VIC % of respondents

	1000 Gan n=296	TGW n=1469
Decided to stop at an attraction or attend an event in TGW	55%	56%
Decided to spend additional night(s) in TGW	6%	9%

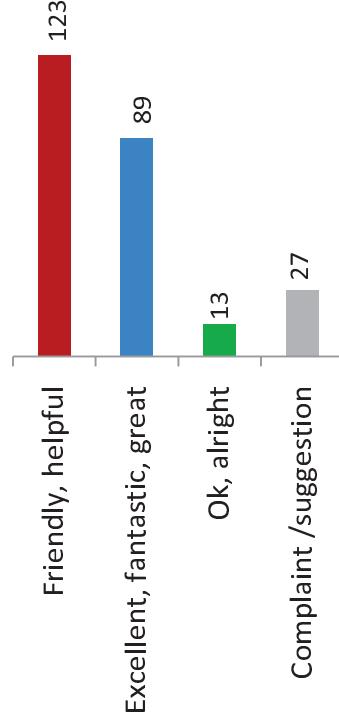
## TGW Awareness

- 25% of 1000 Islands Gananoque respondents recalled TGW advertisements (TGW 25%)
- Online sites were most frequently noticed (same as TGW)

# Customer Service Feedback from 1000 Gan Visitors

## Customer Service Feedback

n=401



### Friendly, helpful

- Will definitely plan a trip back with the family everyone was friendly and welcoming.
- The staff at the Gananogue tourism office were extremely friendly and helpful.
- Everywhere we went staff were pleasant-including the hotel, theatre, boat cruise and restaurants.
- \* The service was good and friendly. We felt at home in Gananogue.*

### Excellent, fantastic, great

- All good, local people extremely helpful and friendly, considerate to my elderly parents.
- Excellent both at the theatre, in restaurants and in the casino.
- The service at the visitor center was excellent, the personal knowledgeable, willing to help and very courteous.
- Of course it was fantastic. We have been living in the US for the past 6 years and it is so refreshing to deal with real, honest, friendly Canadians.
- \* Very good service. People made an effort to speak French and that was greatly appreciated.*

### Suggestion/Complaint

- Area is not advertised enough. Difficult to find interests and things to do in the region.
- Good service for information; should give out more information on regions farther than the tourist information kiosks. (tr. from French)*
- Good customer services, however there are not enough activities to do.
- \* The young people were very kind, but none knew the French language.*
- Restaurant - poor service, nowhere to eat for special diets e.g. vegan.
- There are not enough activities to do.

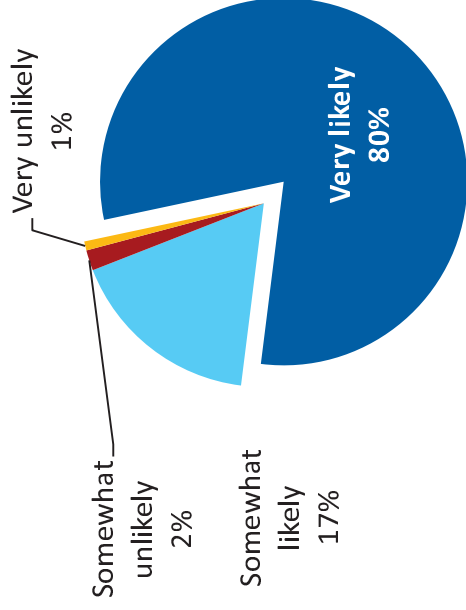
# Congratulations! Great Ratings!!

**1000 Islands Gananoque visitors' Overall rating 8.7 out of 10**

- Similar to the excellent TGW visitors' ratings of overall experience (TGW 8.8)
- 97% were likely or very likely to recommend TGW to friends or family (TGW 97%)
- 22% will likely return this year (TGW 32%), 52% within the next year (TGW 68%) and 71% within the next 3 years (TGW 81%)
- Of those that intend to return, 97% would book activities & accommodation themselves (TGW 98%)
- Opportunities to follow up (TGW similar)
  - 94% entered lucky draw
  - 28% wanted to receive TGW newsletter
  - 14% willing to participate in further tourism research

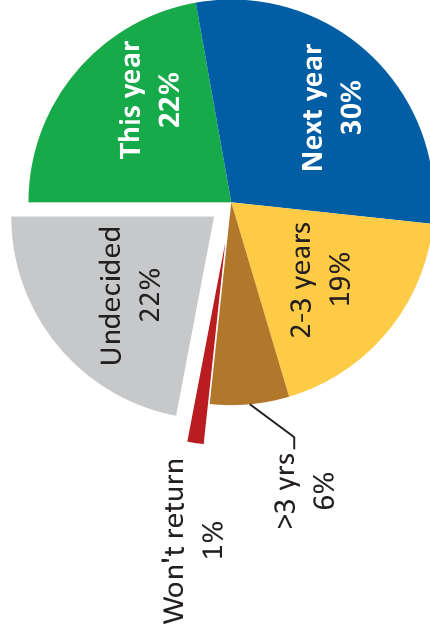
## Likely to recommend TGW

% of respondents n=392

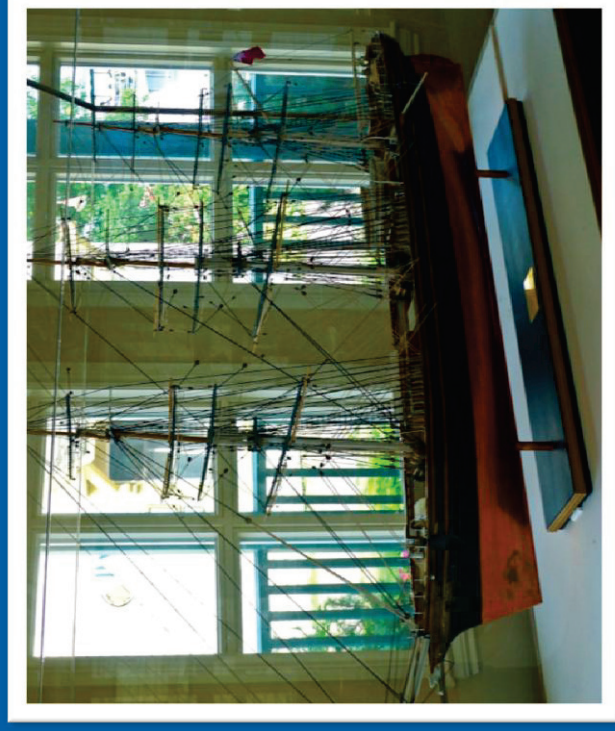


## Likely to return to TGW

% of respondents n=396



# Wrap Up Insights about Visitors to The Great Waterway





# Insights about Visitors to The Great Waterway

**Insight 1: TGW visitors are very loyal, repeat, overnight Ontario visitors with TGW as their primary destination**

Three quarters of 2012 visitors to TGW

- Were Ontario residents
- Came to TGW as their primary destination
- Had visited TGW previously
- Stayed at least one night

**Insight 2: Visitors come for core Outdoor, Cultural & Local Food & Wine Experiences and want to discover more about TGW**

Three quarters of 2012 visitors to TGW

- Visited TGW previously
- Used the internet to plan their trip (with attraction & accommodation sites used most)

# Insights about Visitors to The Great Waterway

## Insight 3: Visitors extremely pleased with their TGW vacations

- Satisfaction rating 8.8 out of 10
- >80% likely to return within next three years
- 97% likely to recommend TGW to friends or family
- 90% had very positive comments about customer service
- Over half of VIC users made additional stop(s) and 9% staying an additional night(s)

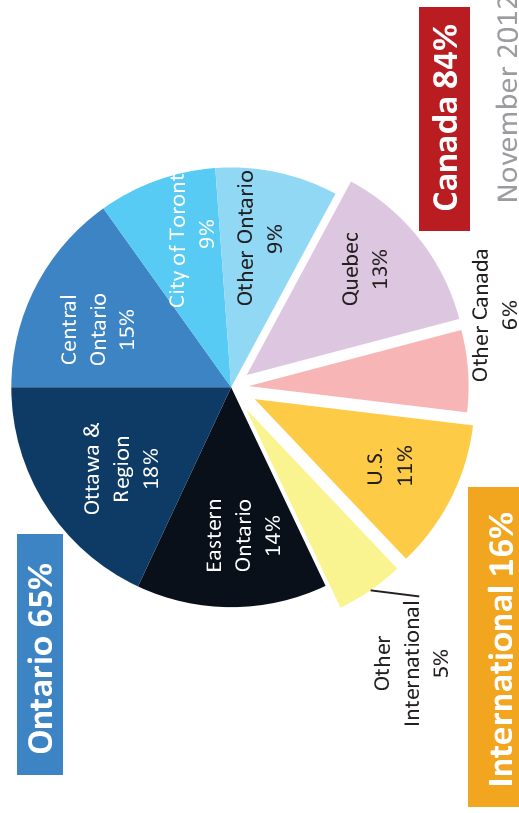
## Insight 4: Significant visitor market beyond Ottawa region/Eastern Ontario

One third of market is from Ottawa region (18%) & Eastern Ontario (14%)

- Central Ontario is 24% of TGW market (City of Toronto 9% & Central Ontario 15%)
- Quebec (13%) is on your doorstep and has potential to grow with increased French language services
- US market continues to be strong
- 15% of Canadians are newcomers, most of born in Europe, living in Canada >10 years

### Permanent Residence TGW Visitors

% of respondents n=2696



# Insights about Visitors to The Great Waterway

## Insight 5: Current TGW visitors prefer to put together their own trips

- 98% were independent travelers, who preferred to book accommodation and activities themselves on their next visit to TGW (vs booking a vacation package)
- They want accessible information online and appreciate in-person suggestions and recommendations when they get to the region

## Insight 6: Visitors recognize and value excellent customer service in TGW

- For some visitors, great customer service is their primary reason for returning to the region
- Many visitors, particularly Americans, were pleasantly surprised by friendliness and helpfulness at VICs, accommodations, restaurants, attractions and by the local residents
- Visitors expected staff of businesses and attractions to have knowledge of tourism resources of the region

# Questions & Discussion

