



Committee Report

To: Warden Mitch Twolan
Members of the Planning and Development Committee

From: Kara Van Myall
Director of Planning and Development

Date: July 9, 2020

Re: 2020 Economic Impact of Tourism Business Survey Update - June

Staff Recommendation:

The 2020 Economic Impact of Tourism Business Survey Update - June report is for information.

Background:

Assessing the Economic Impact of Tourism in Bruce County is an annual undertaking of the Planning and Development department. The framework initiated in 2018 integrates data from multiple sources including:

1. Shared data from partner organizations, including National parks, Provincial campgrounds, municipal parking, harbour data, Ontario Ferries / Chi-Cheemaun;
2. A survey of regional businesses that intersect directly with visitors; and
3. A survey of tourists conducted on-site at various locations / events throughout the County during the summer season. (*Note: In 2018, a panel survey of Ontarians was undertaken by an outside vendor [Ipsos] - this will be repeated in 2020 as recommended and in light of the pandemic*).

The Covid-19 Pandemic that hit mid-March continues to significantly impact businesses across the region, especially those in the tourism industry. These businesses were the first to feel the impact and will be likely take the longest to recover. As such, staff began the process to assess the economic impact of the COVID-19 pandemic on tourism businesses now and do so monthly for 6 months. Doing so will support the analysis needed to follow what is happening in the industry from month to month. Hopefully, this will also acknowledge when the industry begins to rebound as more businesses open, adapt, when restrictions are eventually eased, and increased revenue generation is realized.

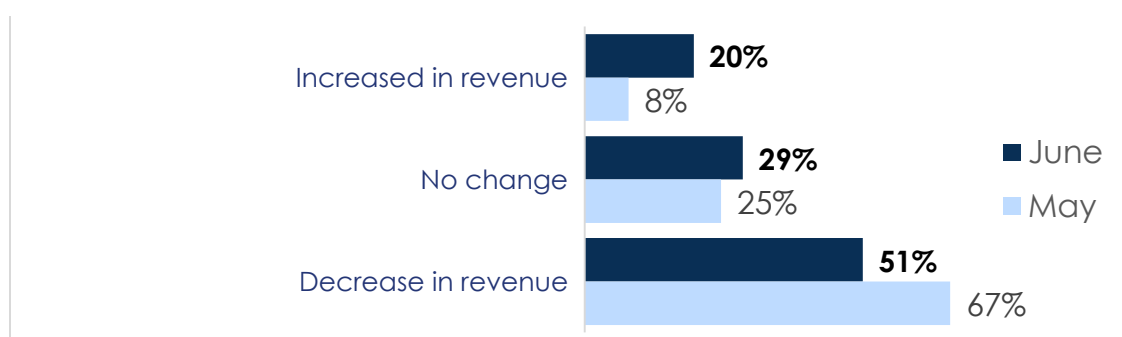
Key Findings from the June 2020 Business Surveys:

The following represents the key findings in the June 2020 business surveys, based on a total of 45 business respondents. This data will continue to build as the work advances over the coming months.

Business Category / Type	Number
Groceries, markets, specialty foods, and alcoholic beverages	12
Retail businesses selling clothing	3
Retail businesses selling products other than clothing	2
Accommodation services including:	15
Hotels and resorts	1
Motels	3
Cottages and cabins	2
Bed and Breakfast	3
Campgrounds and recreational vehicle parks	4
Vacation and recreational camps	2
Recreation, entertainment, and cultural institutions	8
Restaurants and bars	5
Private transportation	-
Vehicle rental	-
Public transportation	-
Adventure outfitters/tour operators	-
None of the above / Not applicable	1

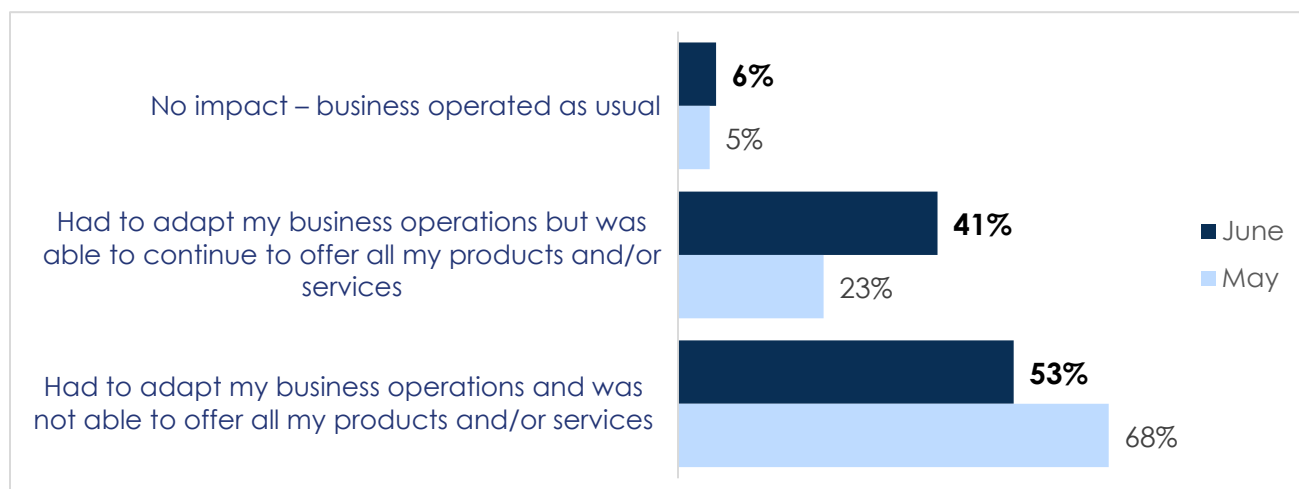
Highlights of the Impact of COVID-19 on Tourism Businesses to date:

- 38% of businesses surveyed were open in March, April and May, while 56% of businesses surveyed were open in June, indicating that more businesses are indeed opening
- The COVID-19 measures continue to have a big impact on businesses in Bruce County but that impact appears to be lessening. The proportion of respondents who report reduced revenue is down directionally from May and the proportion who report revenue has increased is up directionally:



Business Revenue Changes in 2020 Compared to 2019

- A higher proportion of businesses are reporting adaptations in June than in May, however a lower proportion of businesses report being able to offer all their products and/or services in June than in May:



Impact of COVID-19 measures on operation of business

Next Steps:

Business surveys will be continued monthly and the results will start to frame a narrative around the impact of the COVID-19 pandemic on the tourism economy in Bruce County. The monthly findings will be compared consecutively with a final analysis after 6 months. The business survey results will then be tabulated and included with the shared data and visitor survey to compile a fulsome report on the sector. This will inform staff and operators on potential actions to ensure that the tourism industry in Bruce County is back in a growth position post pandemic.

Financial/Staffing/Legal/IT Considerations:

The total cost to run the monthly business survey from May until October, conduct a panel survey of 500 Ontarians, collect shared data from applicable tourism industry sources and report the Economic Impact of Tourism in Bruce County for 2020 is \$50,000. The Regional Tourism Organization 7 (RTO7) will pay \$25,000 and the other \$25,000 will be allocated as an emergency pandemic expense.

Interdepartmental Consultation:

NA

Link to Strategic Goals and Elements:

Goal #6 Explore alternate options to improve efficiency, service:
C. Look for economy of scale or shared services among our departments and our communities

Goal #7 Stimulate and reward innovation and economic development

Written by: Jill Roote, Manager, Economic Development, Planning and Development

Approved by:

A handwritten signature in black ink, reading "Sandra Datars Bere". The signature is written in a cursive style with a large, looping initial 'S'.

Sandra Datars Bere
Chief Administrative Officer