



Tourism Economic Impact

August Report – Key Findings

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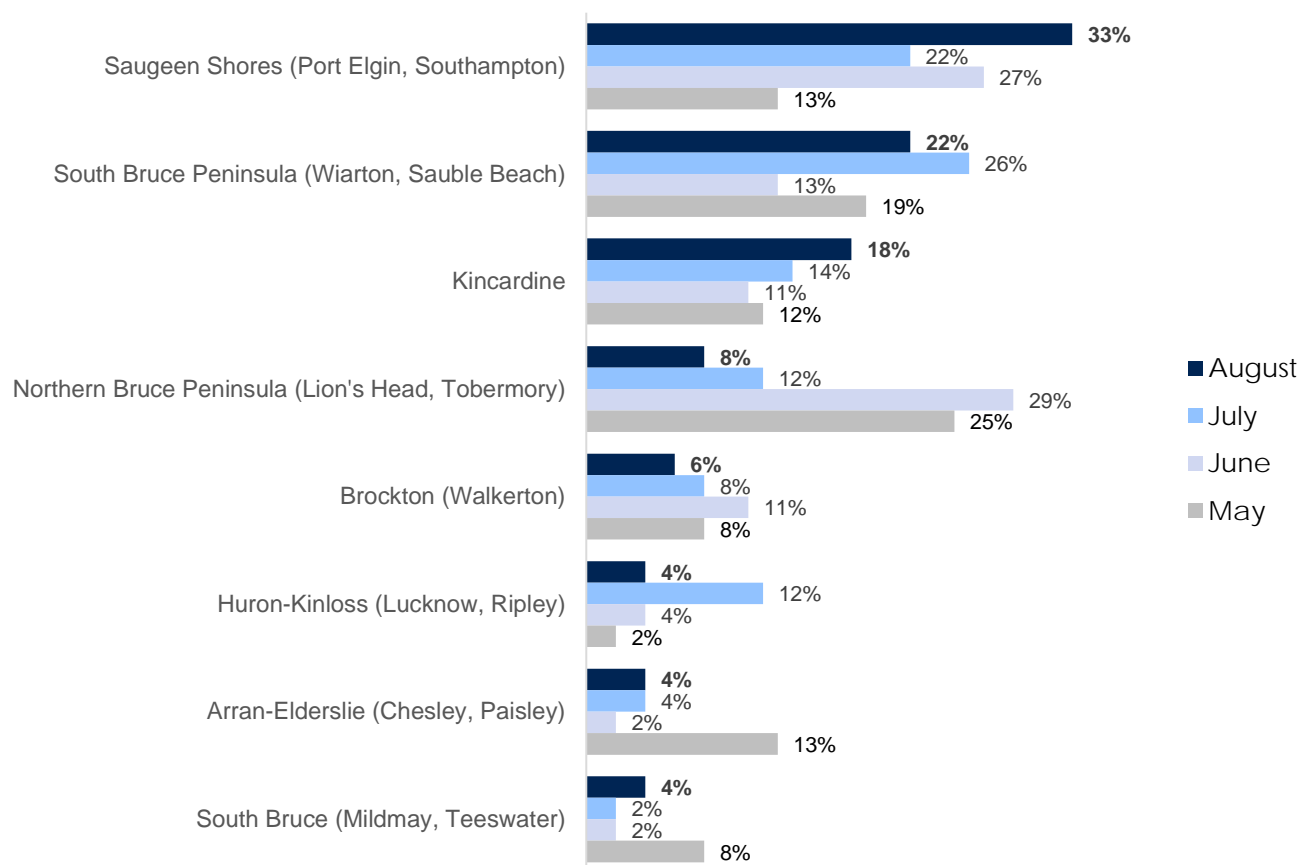
GAME CHANGERS



1.0 Location of Businesses Surveyed

- The largest proportion of businesses surveyed are located in Saugeen Shores, followed by South Bruce Peninsula and Kincardine.
- The lowest representation is from Huron-Kinloss, Arran-Elderslie and South Bruce.

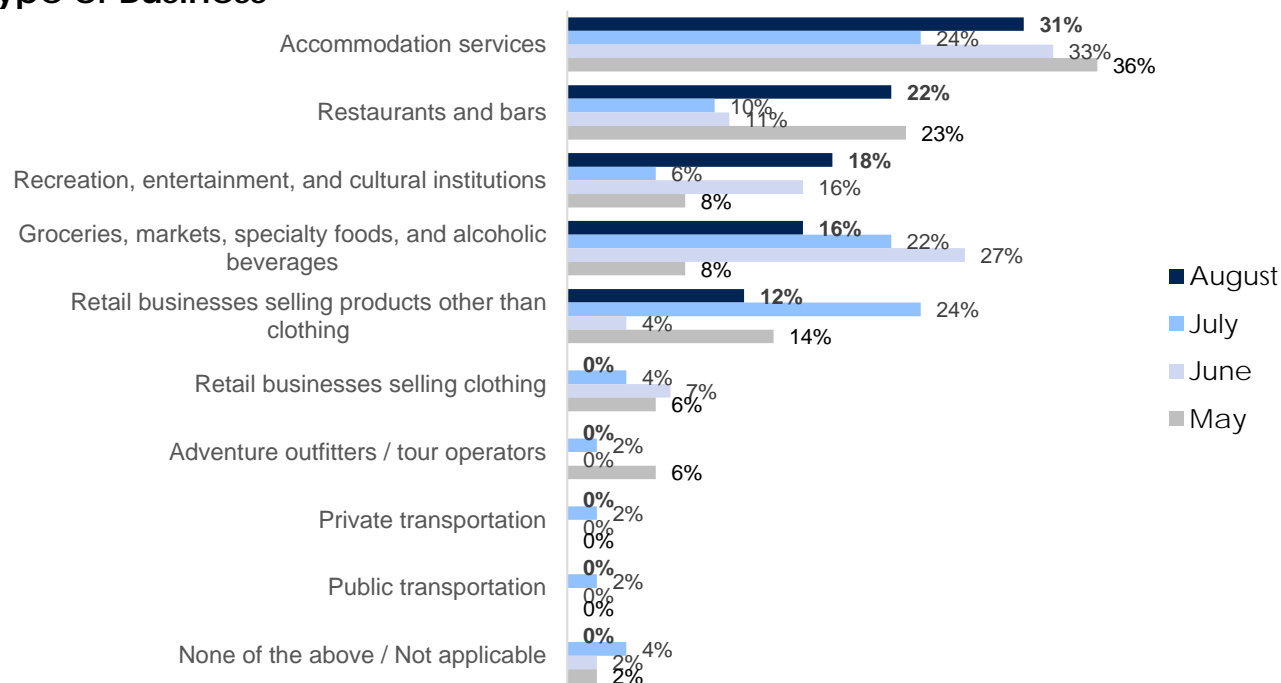
Location of Businesses Surveyed



2.0 Types of Businesses Surveyed

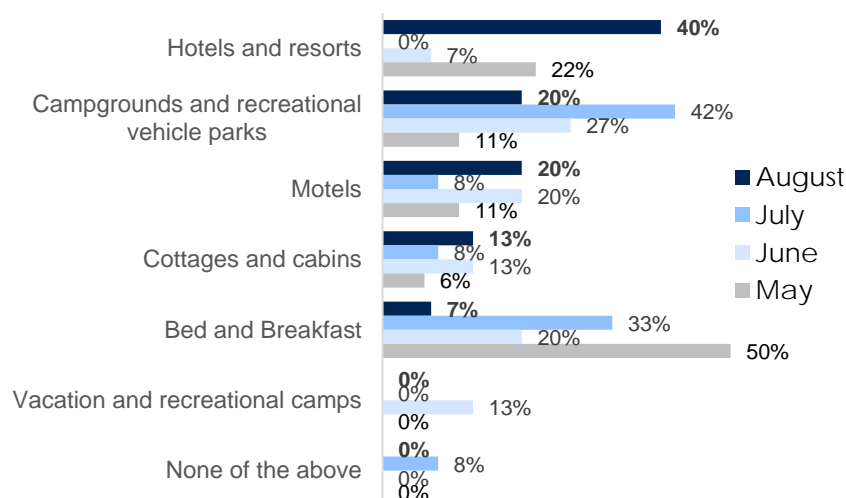
- The largest proportion of business respondents are from accommodation services,
- Since July, there has been a directional increase in the number of accommodation services, restaurants and bars, recreation, entertainment and cultural institutions, and a directional decline in the number of groceries, markets, specialty foods and alcoholic beverage businesses and retail businesses selling products other than clothing.

Type of Business



2. How would you classify your business? If there is more than one applicable classification, please choose the primary one
Base: All respondents (n=49)

Type of Accommodation

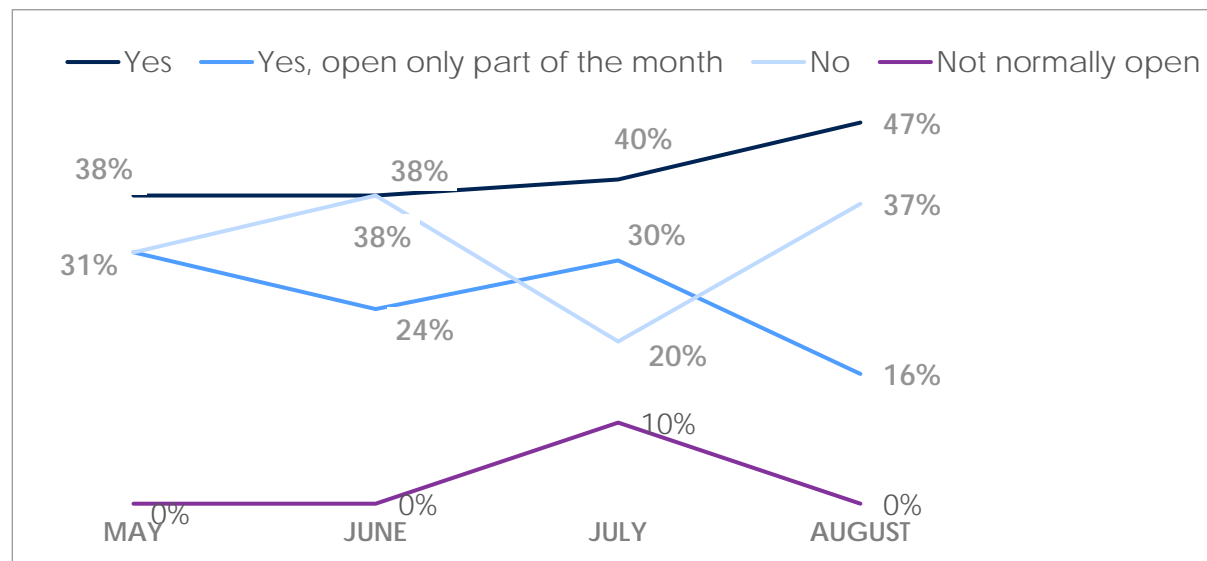


3. What type of accommodation services do you provide? If there is more than one applicable classification, please choose the primary one. Base: Those in accommodation services (n=15)

3.0 Business Open in March

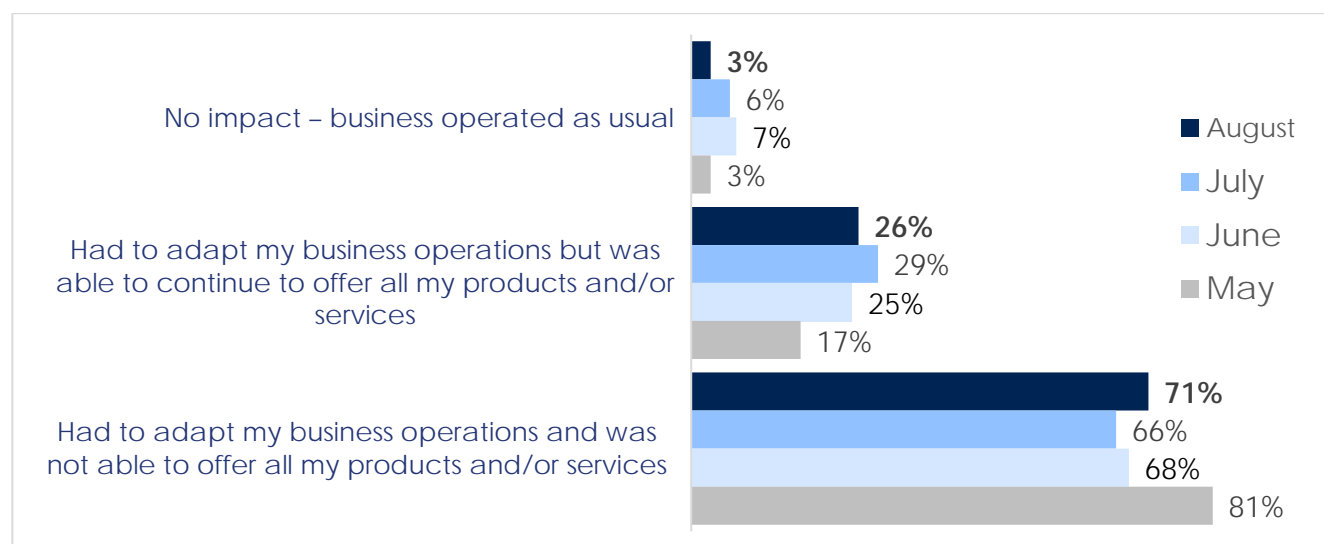
- There has been a directional increase in the proportion, almost half (47%), of businesses surveyed in August, who were open for the full month of March, while 16% (down directionally) were open for part of March but closed down due to COVID-19 measures; 37% (up directionally) were closed.
- Of those that were open or partially opened in March, a large majority (71%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services. One-quarter (26%) had to adapt their business operations and were able to continue to offer all their products and/or services.

Was business open in March?



4. Was your business open in March? Base: All respondents (n=49)

Impact of COVID-19 measures on operation of business



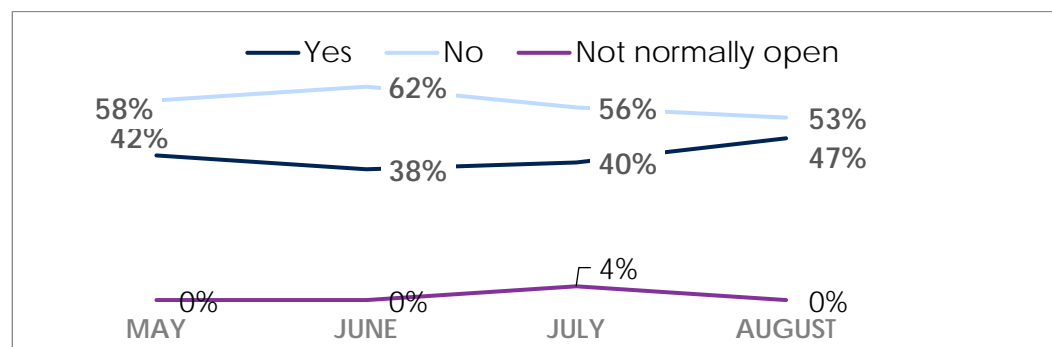
5. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

Base: Those whose businesses were open in March (n=31)

4.0 Business Open in April

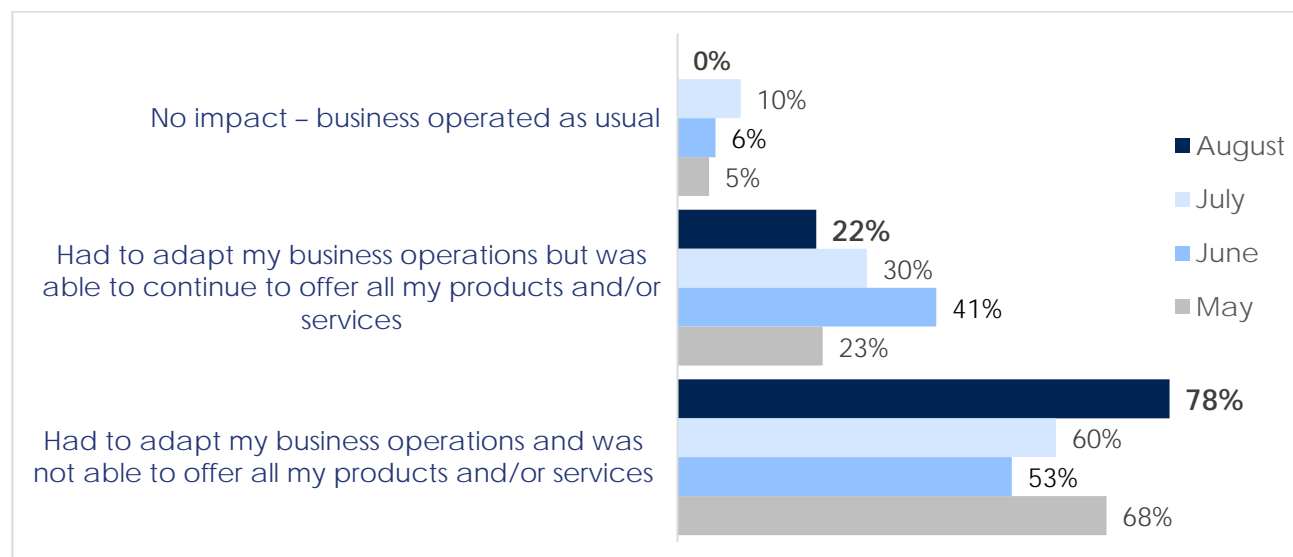
- Almost half (47%) of businesses surveyed were open in April, while 53% were not. The number who were open is up directionally from July.
- Of those that were open in April, a large majority (78%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services; this figure is directionally up from July. Two in ten (22%) had to adapt and were able to continue offering all their products and services; this figure is directionally down from July.

Was business operating in April?



6. Was your business operating in April? Base: All respondents (n=49)

Impact of COVID-19 measures on operation of business



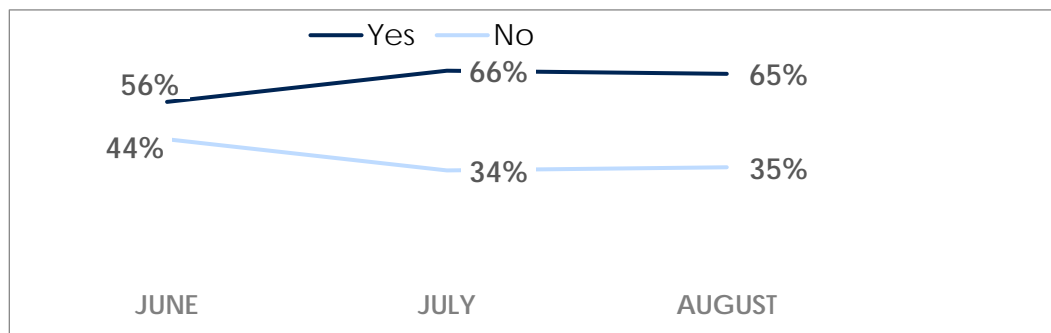
7. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

Base: Those whose businesses were open in April (n=23)

5.0 Business Open in May

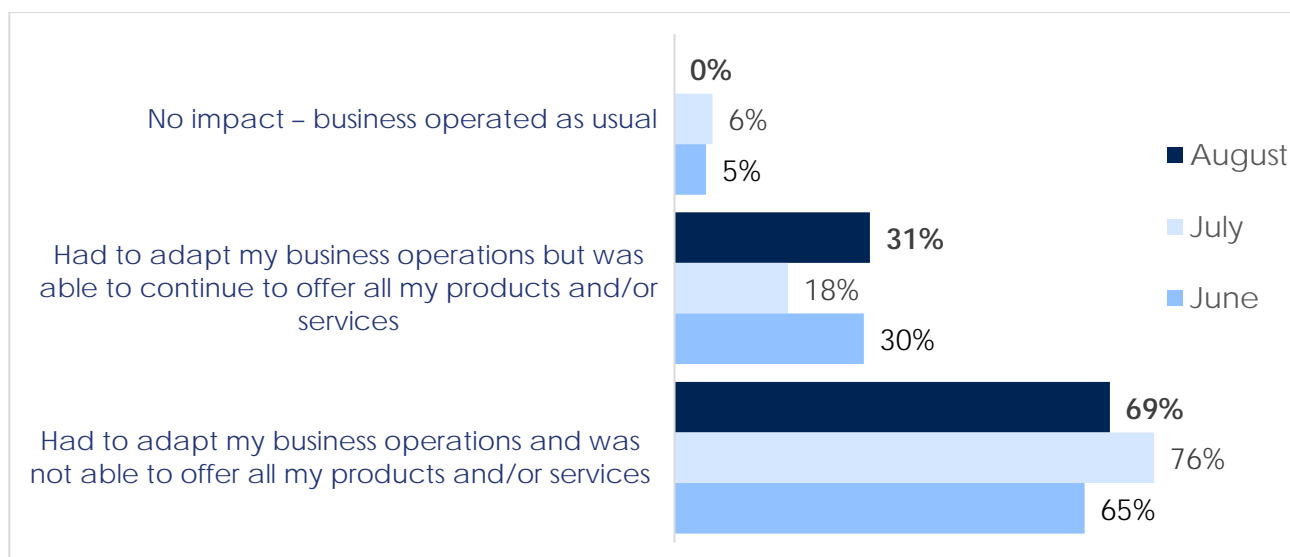
- Similar to July, two-thirds (65%) of businesses surveyed were open in May, while 35% were not.
- Of those that were open in May a large majority (69%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services; this figure is directionally down from July. Three in ten (31%) had to adapt and were able to continue offering all their products and services; this figure is directionally up from July.

Was business operating in May?



8. Was your business operating in May? Base: All respondents (n=49)

Impact of COVID-19 measures on operation of business

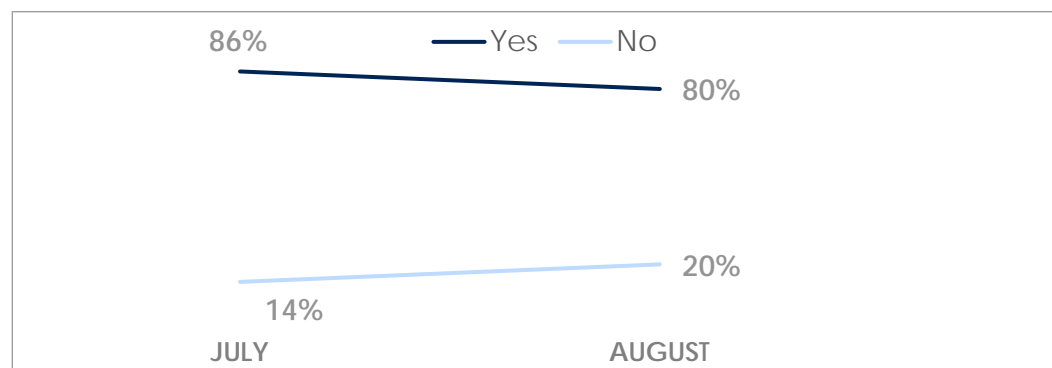


9. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?
Base: Those whose businesses were open in May (n=32)

6.0 Business Open in June

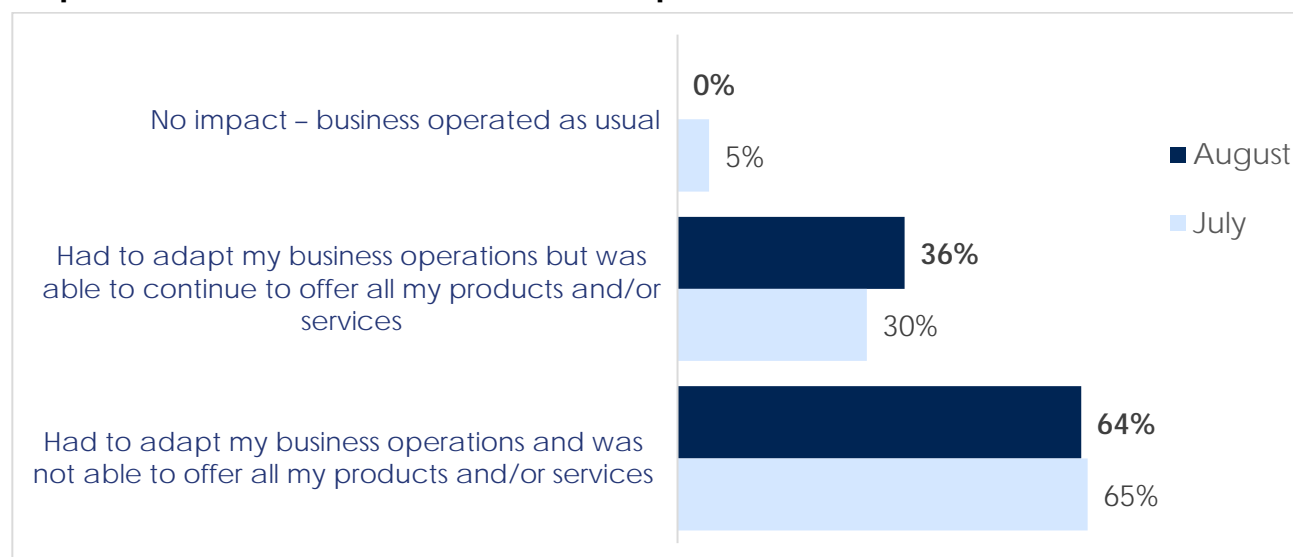
- Eight in ten (80%) businesses surveyed were open in June; this figure is down directionally from July. Two in ten (20%) were not; this figure is up directionally from July.
- Of those that were open in June, a similar number as in July (64%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services, more than one-third (36%) had to adapt and were able to continue offering all their products and services. The latter figure is up directionally from July.

Was business operating in June?



10. Was your business open in June? Base: All respondents (n=49)

Impact of COVID-19 measures on operation of business



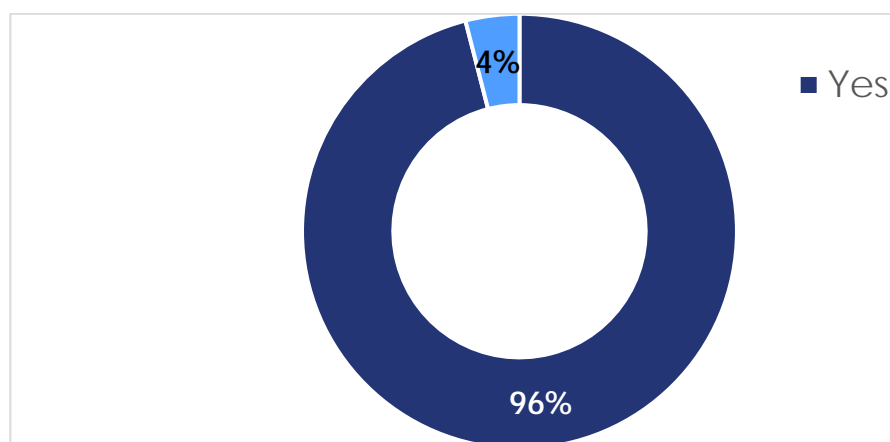
11. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

Base: Those whose businesses were open in June (n=39)

7.0 Business Open in July

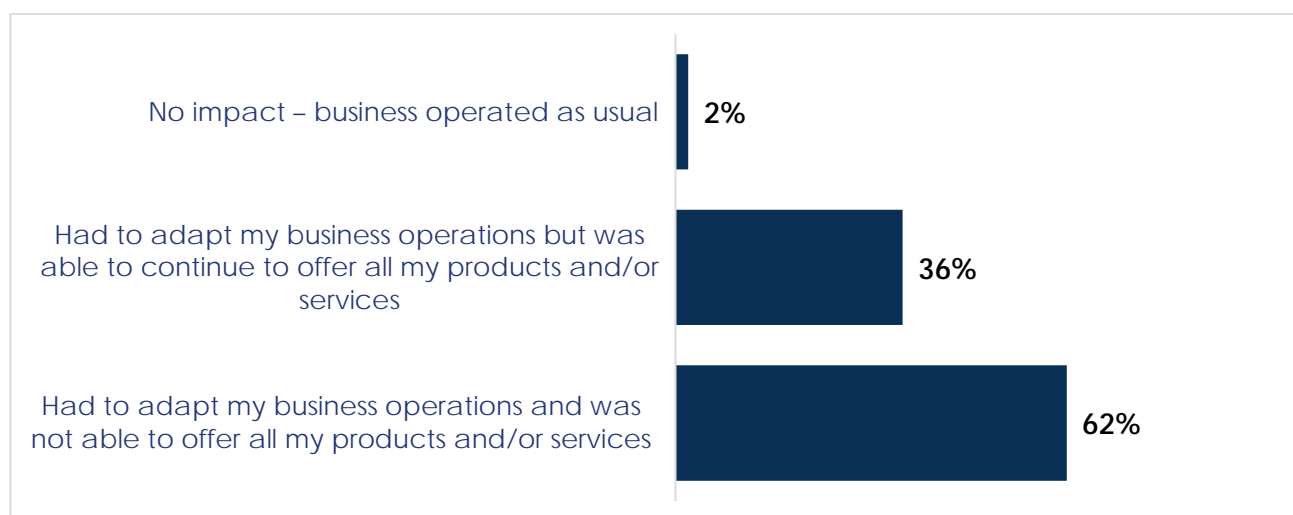
- Almost all (96%) businesses surveyed were open in July.
- Of those that were open in July, a majority (62%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services, while more than one-third (36%) had to adapt and were able to continue offering all their products and services.

Was business operating in July?



12. Was your business open in June? Base: All respondents (n=49)

Impact of COVID-19 measures on operation of business



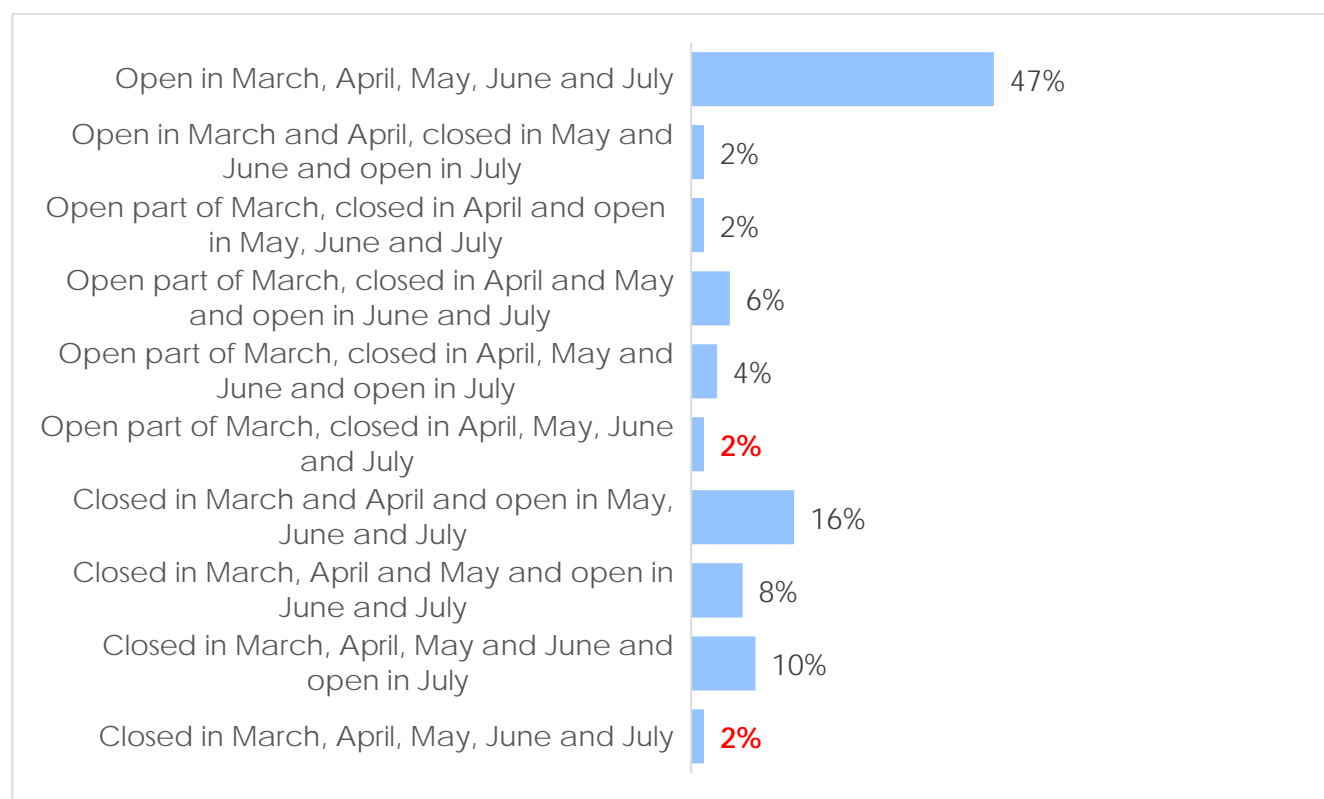
13. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

Base: Those whose businesses were open in June (n=47)

8.0 Business Open (Combined March, April, May, June and July)

- Almost half (47%) of the businesses surveyed in August were open in March, April, May, June and July, while 6% were open part of March, closed in April and May and open in June and July. Almost two in ten (16%) were closed in March and April and open in May, June and July, while 8% were closed in March, April and May and open in June and July, and 10% were closed in March, April, May and June and open in July.
- Only a few of the businesses surveyed in August were affected by COVID-19 and do not seem to have recovered including: 2% who were open part of March but were closed in April, May, June and July and 2% who were not open for all five months.

Business Open (Combined March, April, May, June and July)



4. Was your business open in March? Base: All respondents (n=49)

6. Was your business operating in April? Base: All respondents (n=49)

8. Was your business open in May? Base: All respondents (n=49)

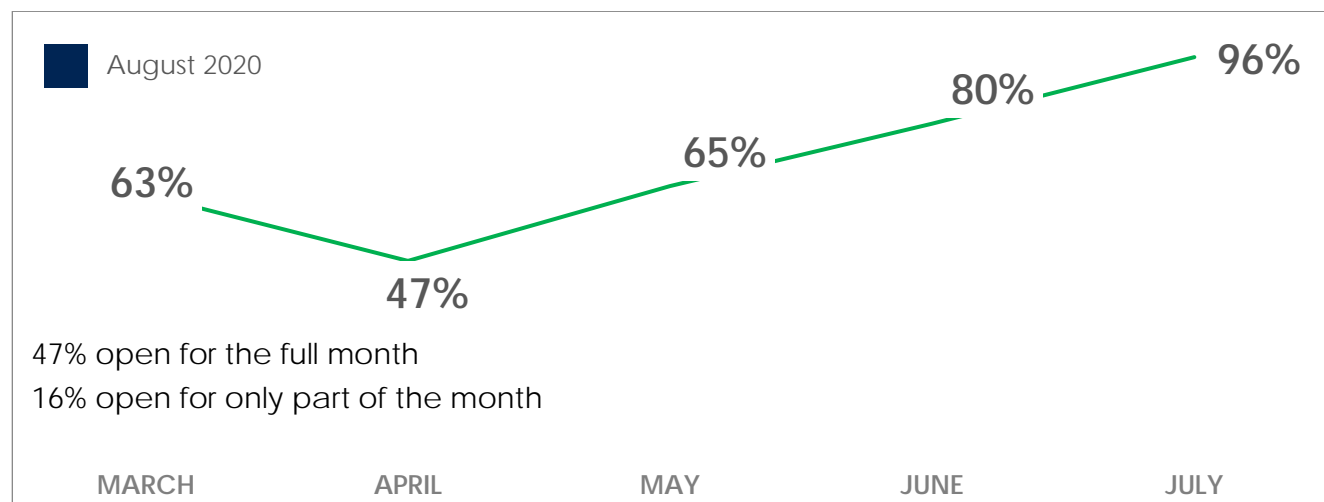
10. Was your business open in June? Base: All respondents (n=49)

12. Was your business open in July? Base: All respondents (n=49)

9.0 Business Open –Yes (Change over time)

- The COVID-19 measures had a big impact on businesses in Bruce County in April but bounced back in May and increased again in June and July.
- Among the businesses surveyed, there was a huge decline in the number of businesses open in April compared to March, but a rebound in May and increases in the next two waves to a high of 96%.

Business Open –Yes (Change over time)



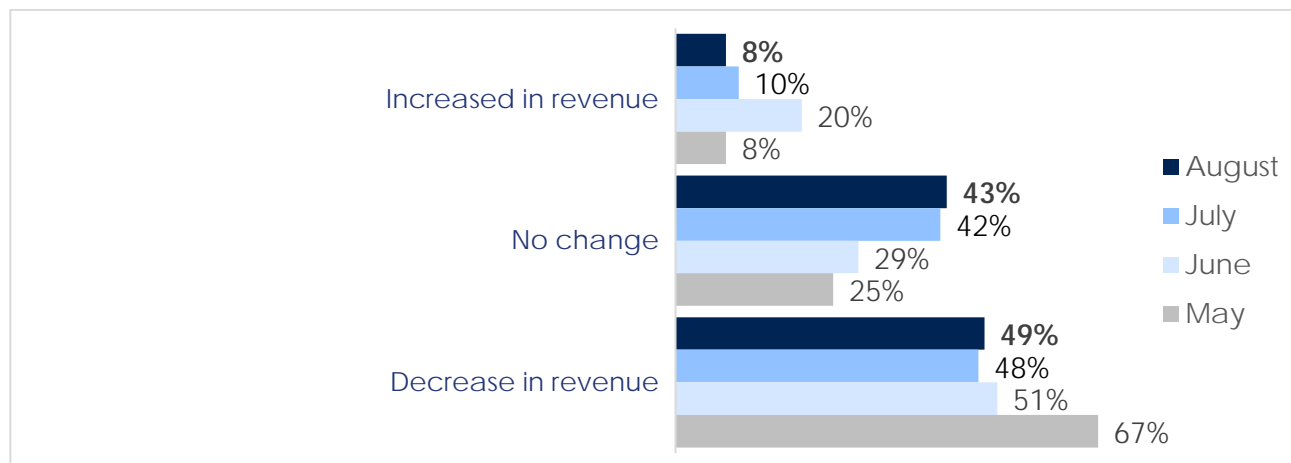
*The March figure is a combination of businesses who were open or partially open in March. It is lower than the number in June because in the current survey, five businesses surveyed say that they are not normally open at this time of the year.

4. Was your business open in March? Base: All respondents (n=49)
 6. Was your business operating in April? Base: All respondents (n=49)
 8. Was your business open in May? Base: All respondents (n=49)
 10. Was your business open in June? Base: All respondents (n=49)
 12. Was your business open in July? Base: All respondents (n=49)

10.0 Business Revenue –1st Quarter 2020 Compared to 1st Quarter 2019

- Half (49%) of businesses surveyed experienced a decrease in business revenue in quarter 1 2020 compared to quarter 1 2019; while 8% saw an increase and 43% no change.
- On average, those who experienced a decrease, experienced a decrease of 38%.
- On average, those who experienced an increase, experienced an increase of 15%.

Business Revenue –1st Quarter 2020 Compared to 1st Quarter 2019



12. Thinking about your business revenue in quarter 1 2020 compared to quarter 1 2019, did you experience...? Base: All respondents (n=49)

13. Approximately, by what percentage did your revenue increase? Base: Those who experienced an increase (n=4)

14. Approximately, by what percentage did your revenue decrease? Base: Those who experienced an increase (n=24)

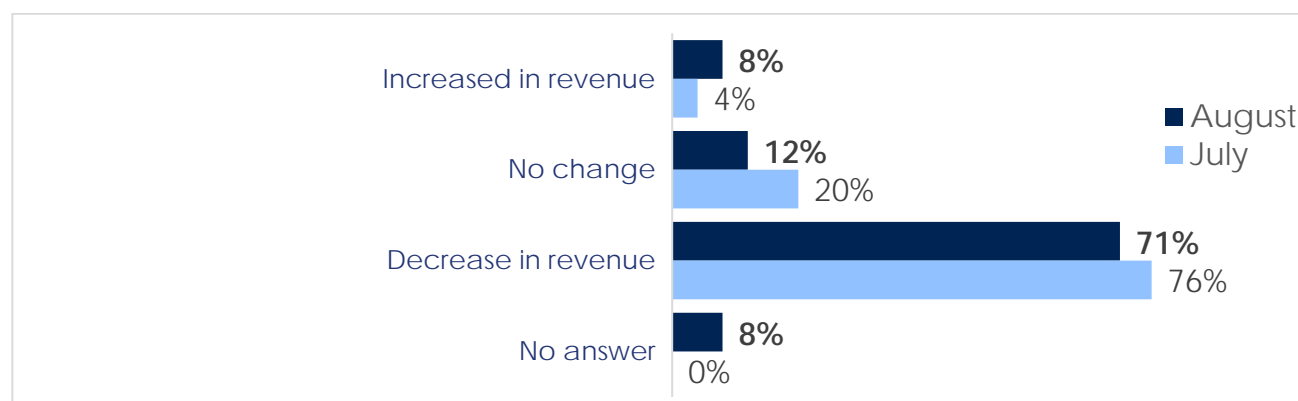
Percentage of Revenue Increase/Decrease

	May	June	July	August
Increase	51%	40%	24%	15%
Decrease	43%	42%	41%	38%

11.0 Business Revenue –2nd Quarter 2020 Compared to 2nd Quarter 2019

- Seven in ten (71%) of the businesses surveyed experienced a decrease in business revenue in quarter 2 2020 compared to quarter 2 2019; while 8% saw an increase and 12% no change.
- On average, those who experienced a decrease, experienced a decrease of 41%.
- On average, those who experienced an increase, experienced an increase of 28%.

Business Revenue –2nd Quarter 2020 Compared to 2nd Quarter 2019



15. Thinking about your business revenue in quarter 2 2020 compared to quarter 2 2019, did you experience...?

Base: All respondents (n=49)

16. Approximately, by what percentage did your revenue increase? Base: Those who experienced an increase (n=2)

17. Approximately, by what percentage did your revenue decrease? Base: Those who experienced an increase (n=38)

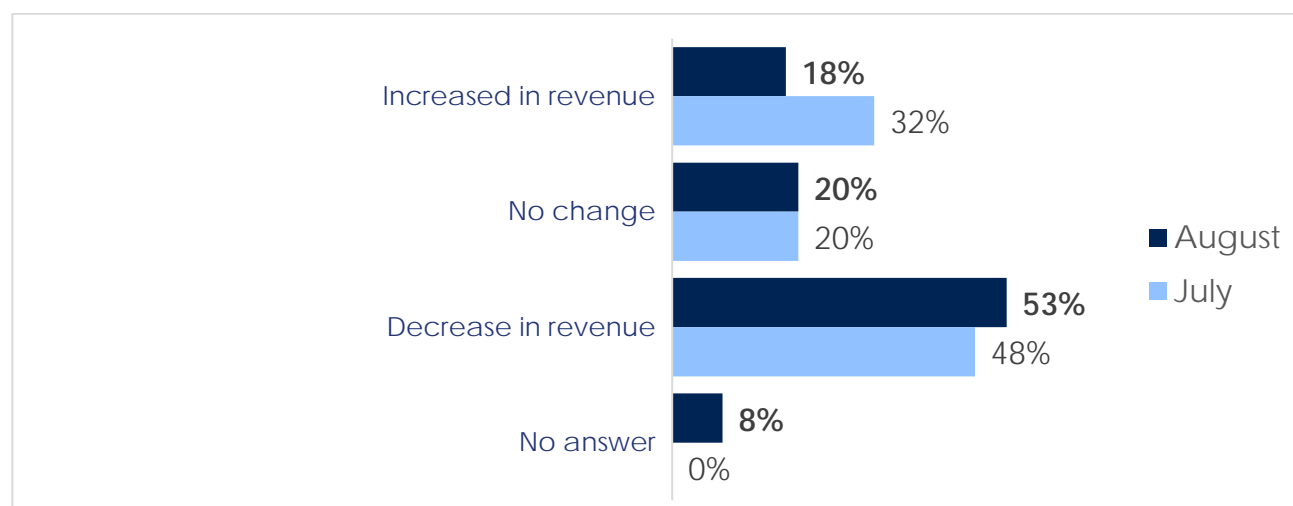
Percentage of Revenue Increase/Decrease

	July	August
Increase	41%	28%
Decrease	61%	41%

12.0 Business Revenue –2nd Quarter 2020 Compared to 1st Quarter 2020

- Just over half (53%) of the businesses surveyed experienced a decrease in business revenue in quarter 2 2020 compared to quarter 1 2020; while 18% saw an increase and 20% no change.
- On average, those who experienced a decrease, experienced a decrease of 70%.
- On average, those who experienced an increase, experienced an increase of 40%.

Business Revenue –2nd Quarter 2020 Compared to 1st Quarter 2020



18. Thinking about your business revenue in quarter 2 2020 compared to quarter 1 2020, did you experience...?Base: All respondents (n=49)

19. Approximately, by what percentage did your revenue increase? Base: Those who experienced an increase (n=9)

20. Approximately, by what percentage did your revenue decrease? Base: Those who experienced an increase (n=26)

	July	August
Increase	31%	40%
Decrease	58%	70%