



Tourism Economic Impact

October Report – Key Findings

Re-contacted businesses (businesses contacted in June and July 2020)

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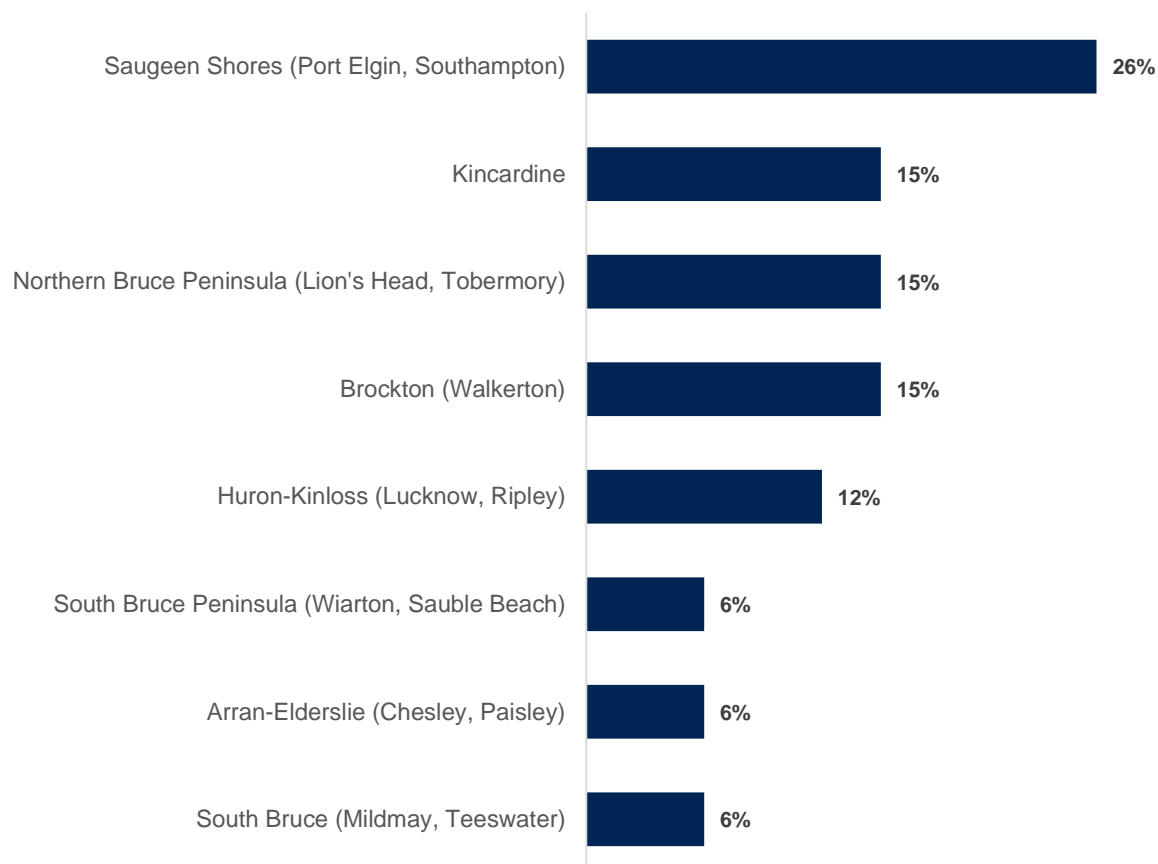
GAME CHANGERS



1.0 Location of Businesses Surveyed

- The largest proportion of re-contacted businesses surveyed are located in Saugeen Shores.
- The lowest representation is from South Bruce Peninsula, Arran-Elderslie and South Bruce.

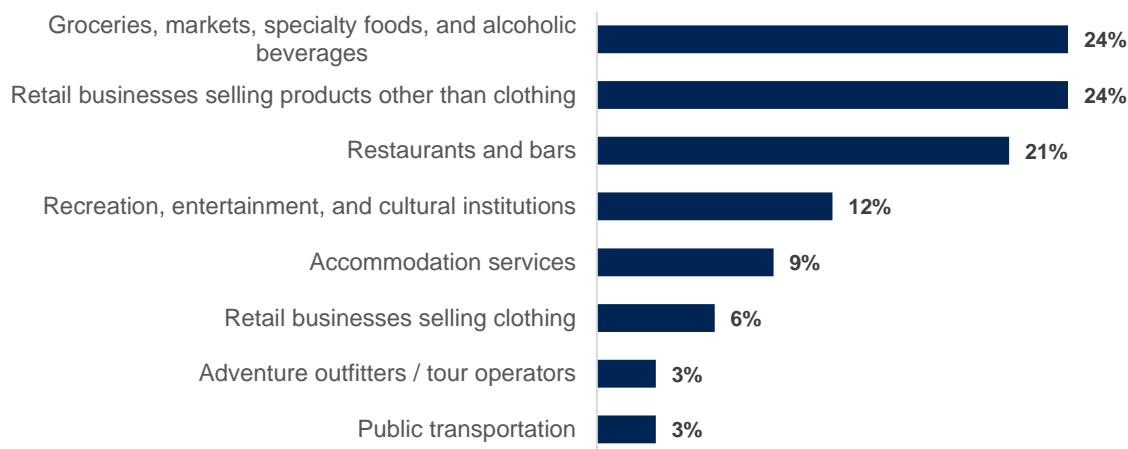
Location of Businesses Surveyed



2.0 Types of Businesses Surveyed

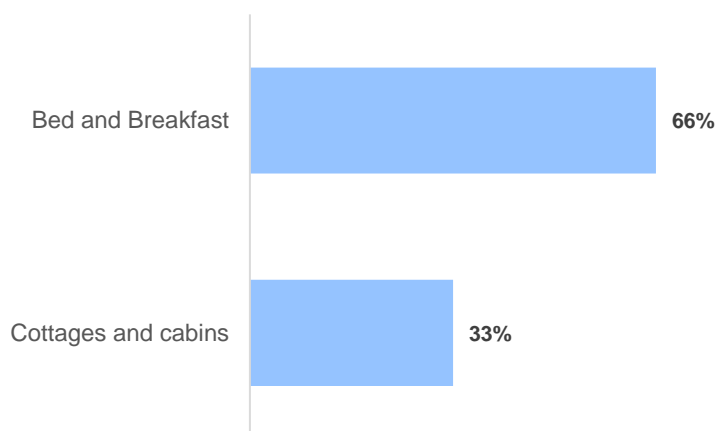
- The largest proportions of re-contacted business respondents are from groceries, markets, specialty foods and alcoholic beverages, retail businesses selling products other than clothing or restaurants and bars.
- It should be noted that the sample of businesses that were re-contacted in October were much less representative of the accommodation sector and more likely to include groceries, markets, specialty foods, and alcoholic beverages 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=50)

Type of Accommodation

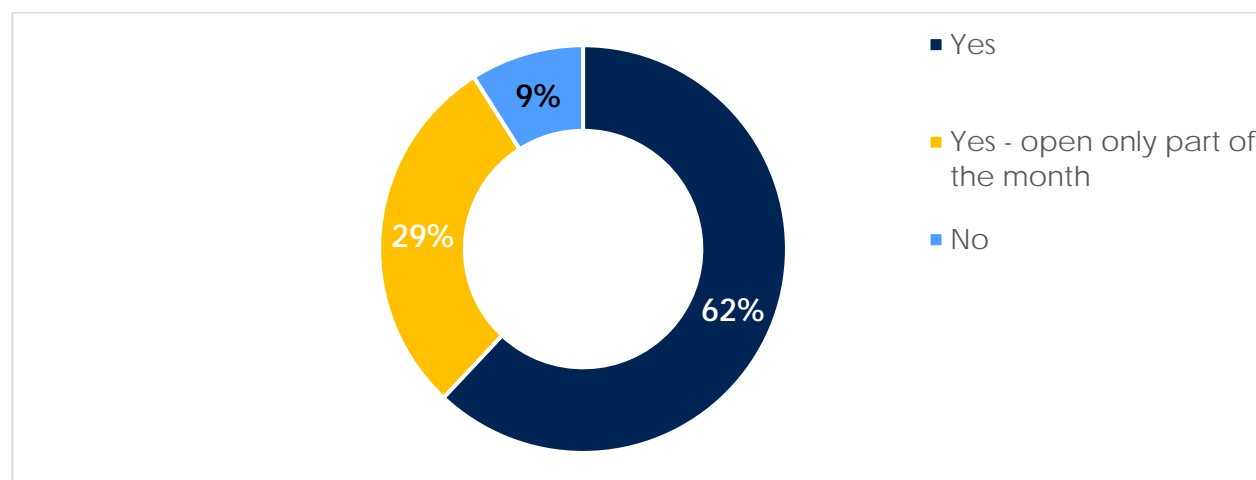


3. What type of accommodation services do you provide? If there is more than one applicable classification, please choose the primary one. Base: Those in accommodation services (n=9)

3.0 Business Open in March

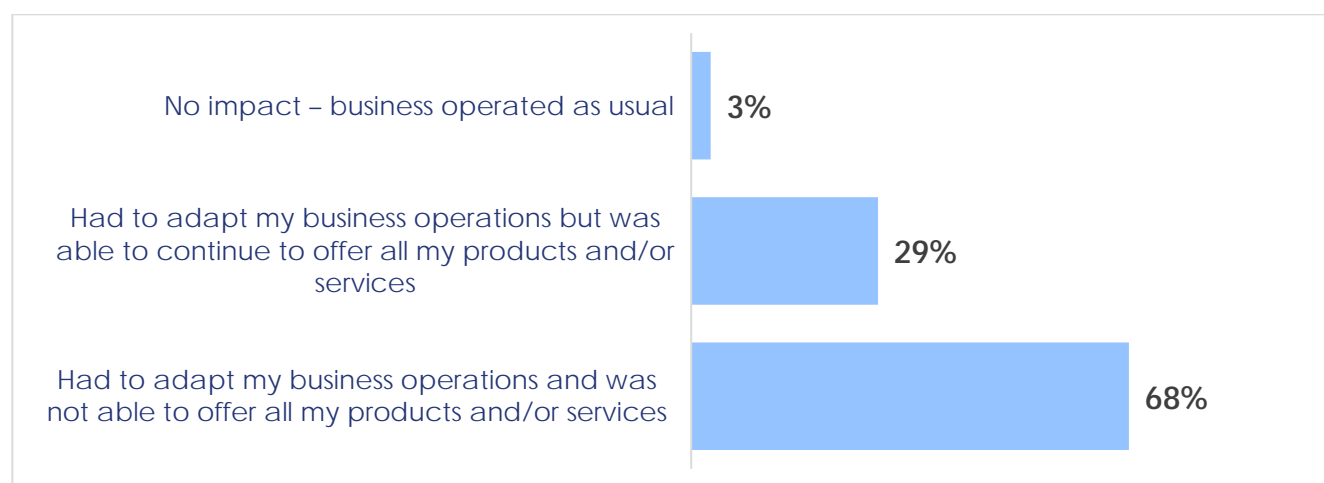
- Six in ten (62%) of re-contacted businesses were open in March, while 29% were open for part of March but closed down due to COVID-19 measures; 9% were not open in March.
- Among those businesses that were open in March, more than two-thirds (68%) say that measures adopted by the provincial government resulted in them having to adapt their business operations but they were not able to continue to offer all their products and/or services; while only 29% say they had to adapt their business operations and were able to offer all their products and/or services.

Was business open in March?



4. Was your business open in March? Base: All respondents (n=50)

Impact of COVID-19 measures on operation of business



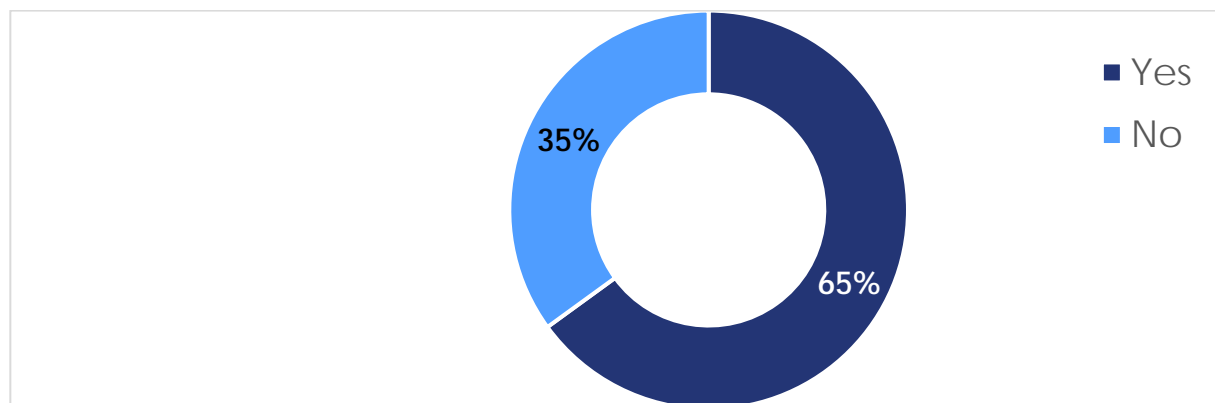
5. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

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

4.0 Business Open in April

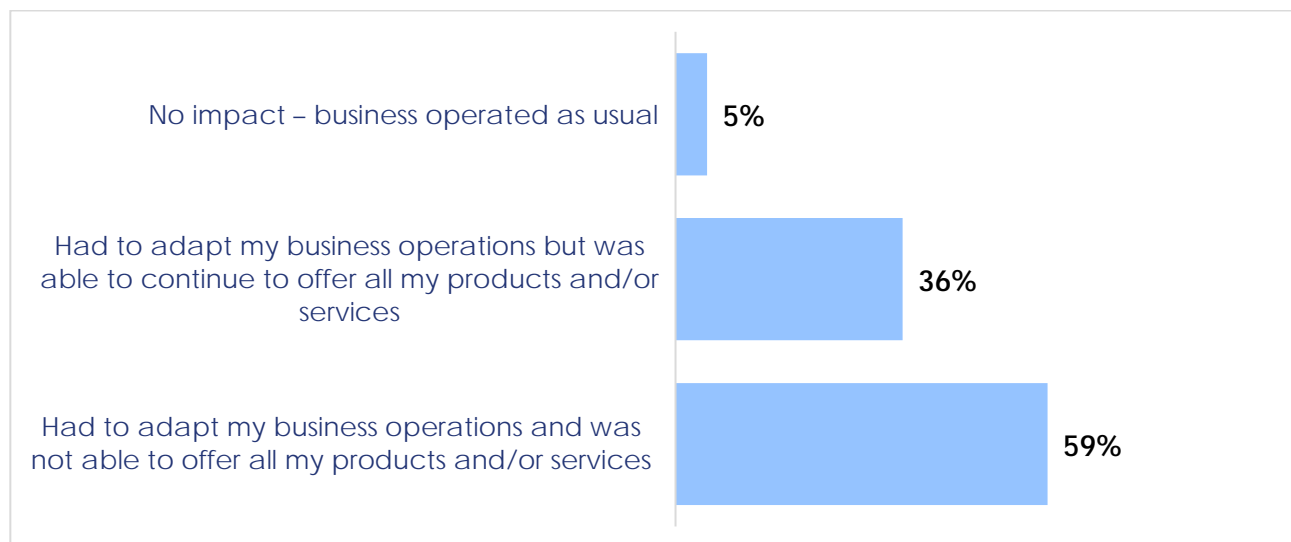
- Two-thirds (65%) of re-contacted businesses were open in April, while 35% were not. The number who were not open in April was up from 9% in March.
- Of those that were open in April, six in ten (59%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services; this figure is down directionally from March. More than one-third (36%) had to adapt and were able to continue offering all their products and services; this figure is up directionally.

Was business operating in April?



6. Was your business operating in April? Base: All respondents (n=34)

Impact of COVID-19 measures on operation of business

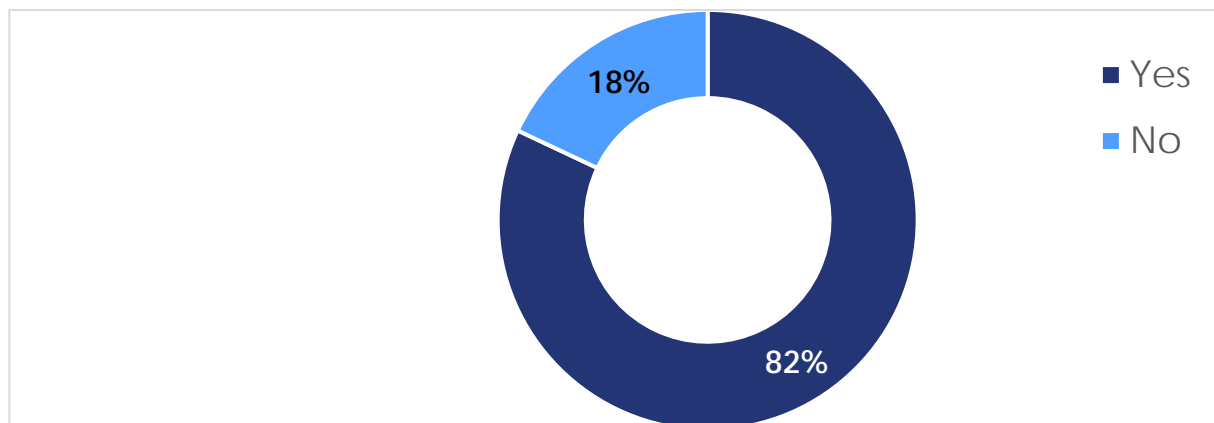


7. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?
Base: Those whose businesses were open in April (n=22)

5.0 Business Open in May

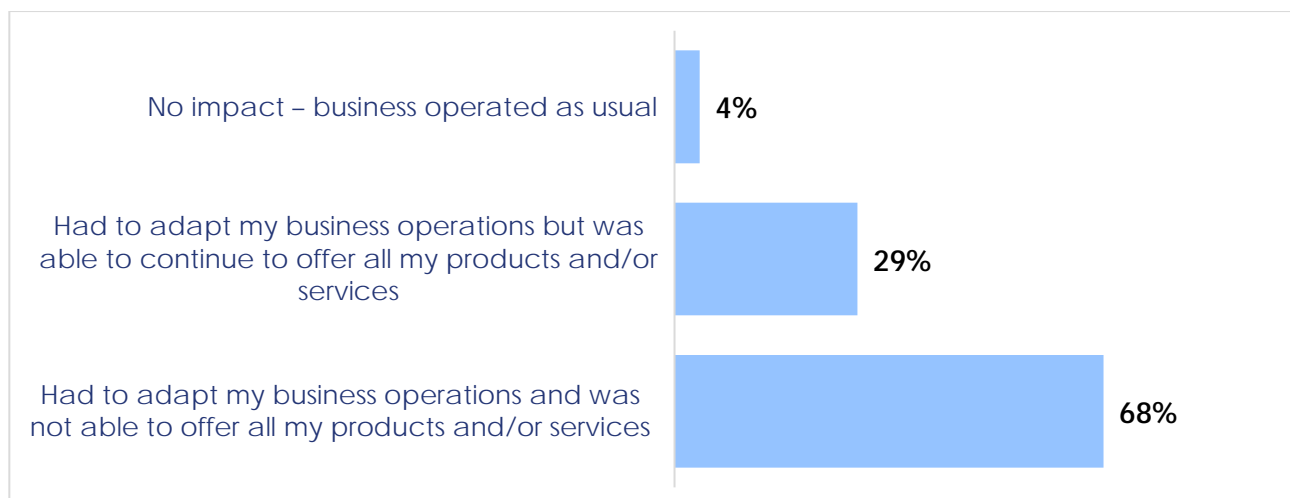
- Eight in ten (82%) re-contacted businesses were open in May; this figure is up directionally from April. Two in ten (18%) were not open; this figure is down directionally.
- Of those that were open in May, a large majority (68%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services; this figure is up directionally from April. Three in ten (29%) had to adapt and were able to continue offering all their products and services; this figure is down directionally.

Was business operating in May?



8. Was your business operating in May? Base: All respondents (n=34)

Impact of COVID-19 measures on operation of business

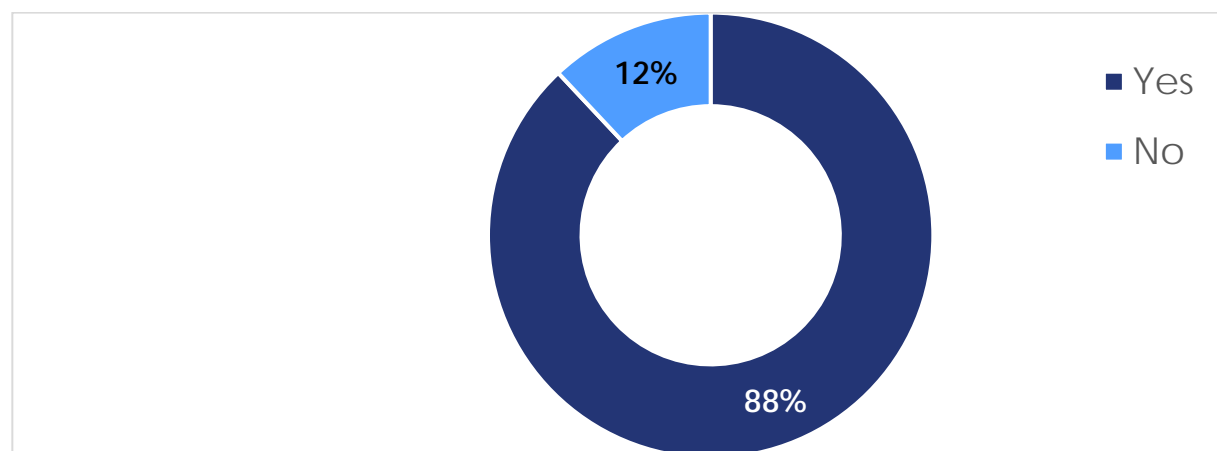


9. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?
Base: Those whose businesses were open in May (n=28)

6.0 Business Open in June

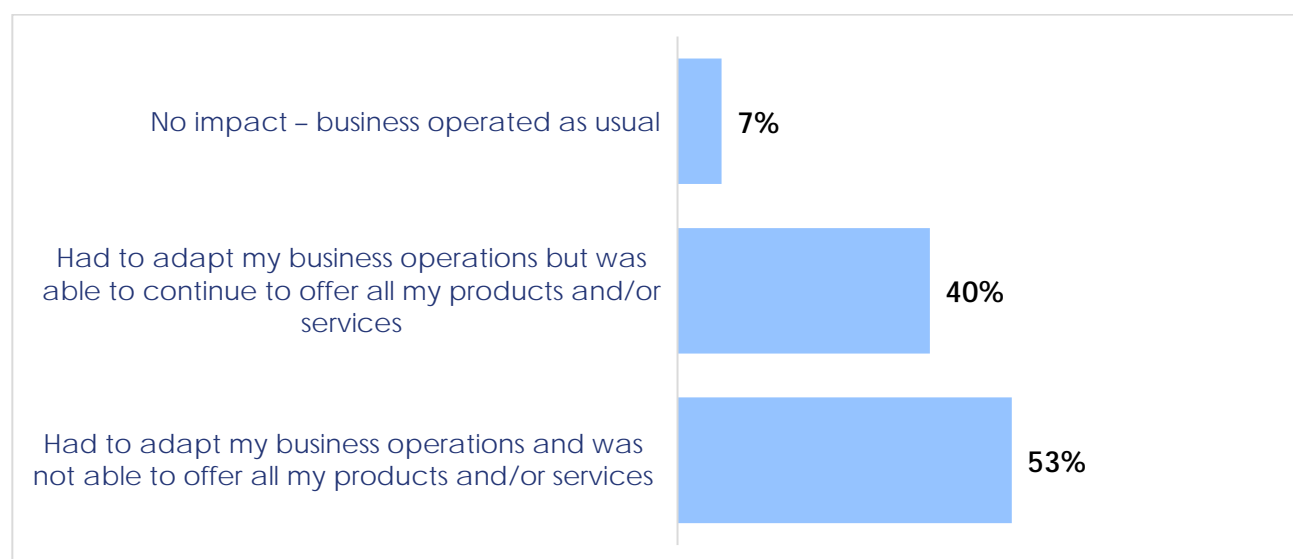
- Nine in ten (88%) of re-contacted businesses surveyed were open in June, while 12% were not. The proportion who were open was up directionally from 82% in May.
- Of those that were open in June, a majority (53%) had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services; this figure is down directionally from May. Four in ten (40%) had to adapt and were able to continue offering all their products and services; this figure is up directionally from May. Seven percent say there was no impact on their business.

Was business operating in June?



10. Was your business open in June? Base: All respondents (n=34)

Impact of COVID-19 measures on operation of business



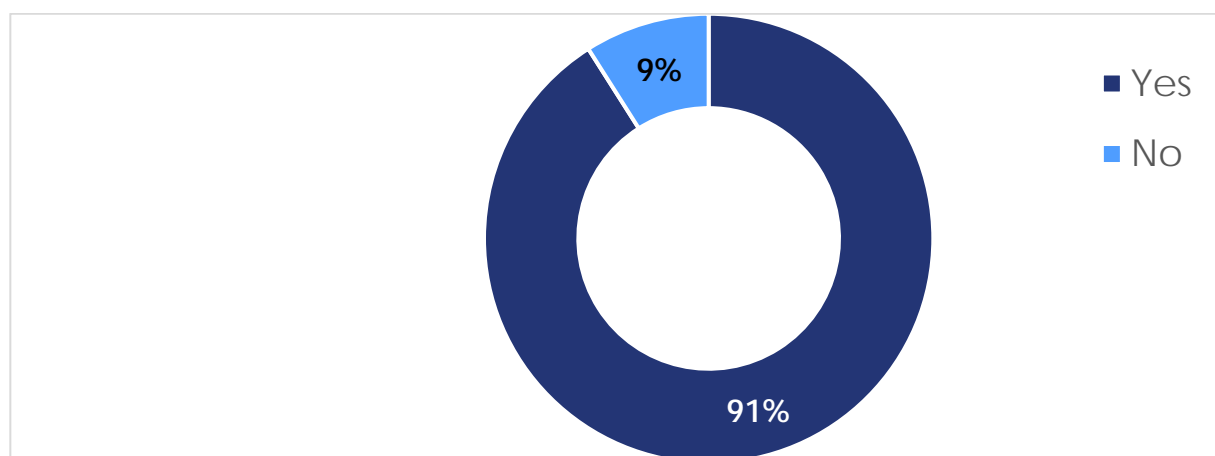
11. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

Base: Those whose businesses were open in June (n=30)

7.0 Business Open in July

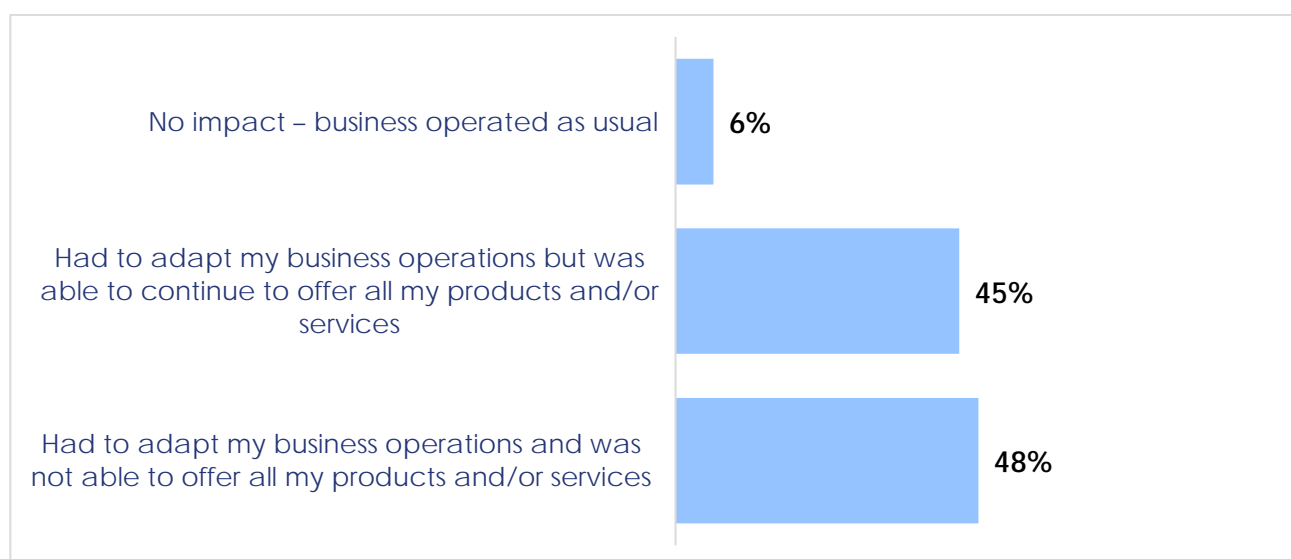
- Nine in ten (91%) of re-contacted businesses surveyed were open in July, while 9% were not. These margins were steady since June.
- Of those that were open in July, half (48%), down directionally from June had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services. About half (45%) had to adapt and were able to continue offering all their products and services; this figure is up directionally from June. Six percent say there was no impact on their business.

Was business operating in July?



12. Was your business open in June? Base: All respondents (n=34)

Impact of COVID-19 measures on operation of business



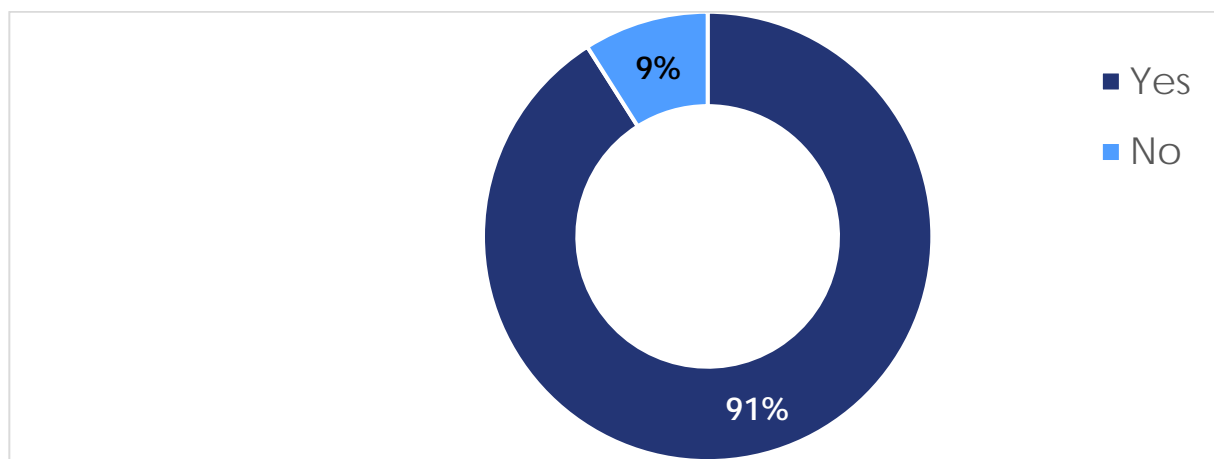
13. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

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

8.0 Business Open in August

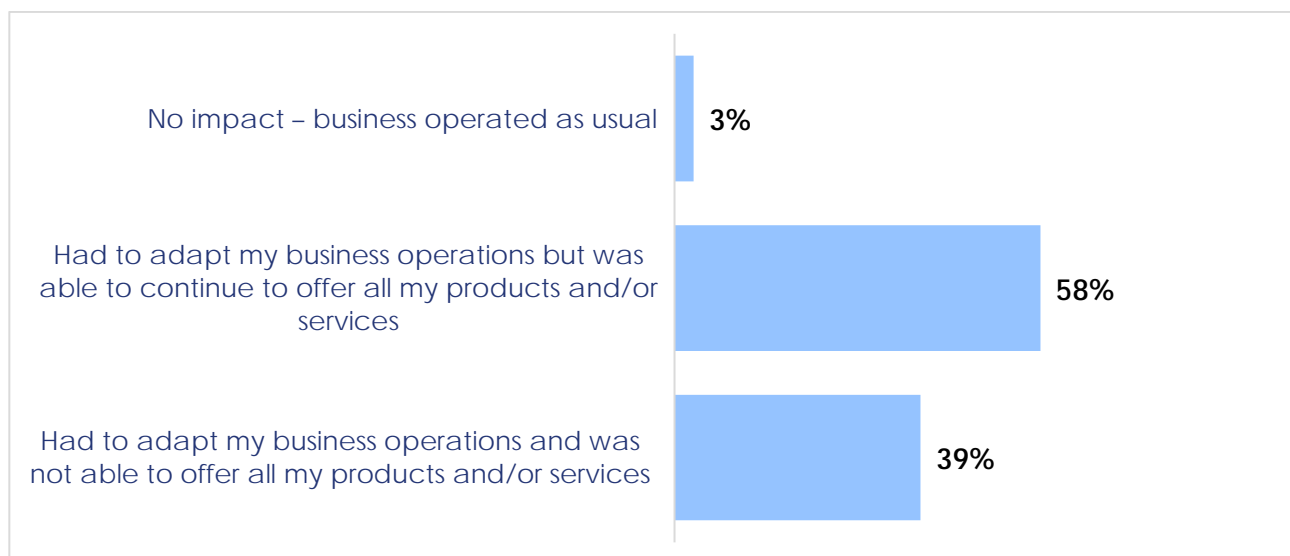
- As in July, nine in ten (91%) of re-contacted businesses surveyed were open in August, while 9% were not.
- Of those that were open in August, four in ten (39%), down directionally from both June and July, had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services. A majority of six in ten (58%) had to adapt and were able to continue offering all their products and services; this figure is up directionally from both June and July. Three percent say there was no impact on their business.

Was business operating in August?



14. Was your business open in June? Base: All respondents (n=34)

Impact of COVID-19 measures on operation of business



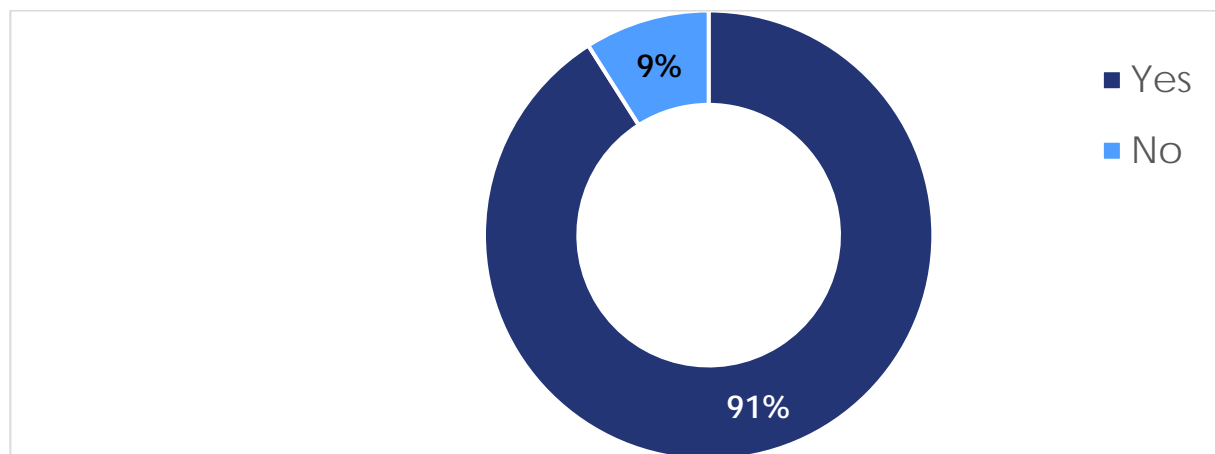
15. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

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

9.0 Business Open in September

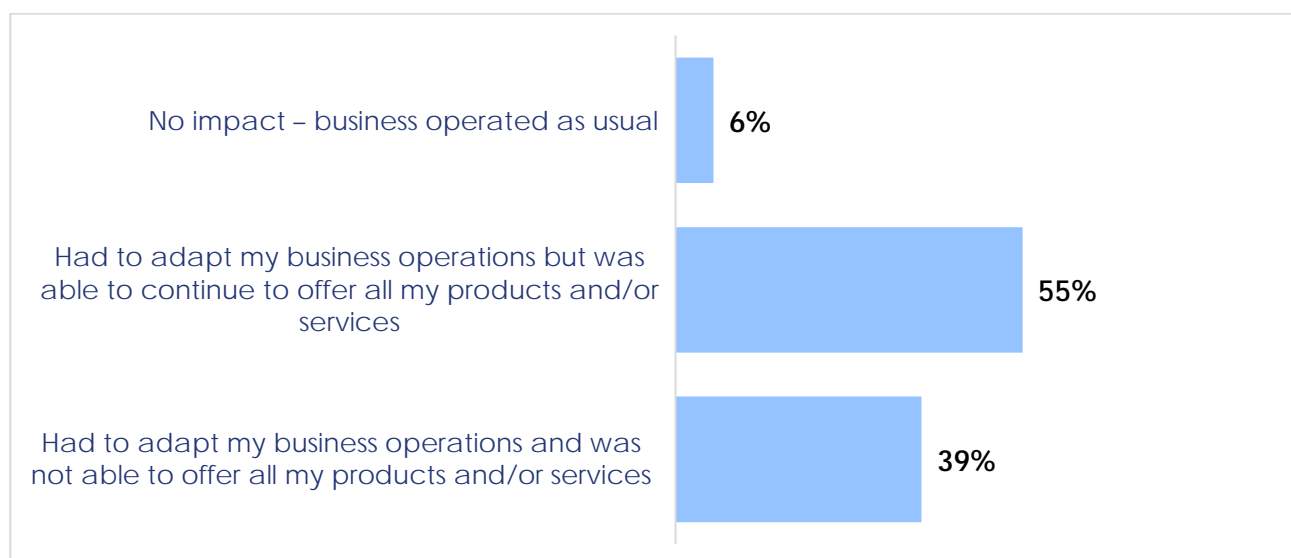
- As in July and August, nine in ten (91%) of re-contacted businesses surveyed were open in September, while 9% were not.
- Of those that were open in September, four in ten (39%), unchanged, had to adapt their business operations due to COVID-19 measures and were not able to offer all of their products and/or services. More than half (55%) had to adapt and were able to continue offering all their products and services. Six percent say there was no impact on their business.

Was business operating in September?



16. Was your business open in September? Base: All respondents (n=34)

Impact of COVID-19 measures on operation of business



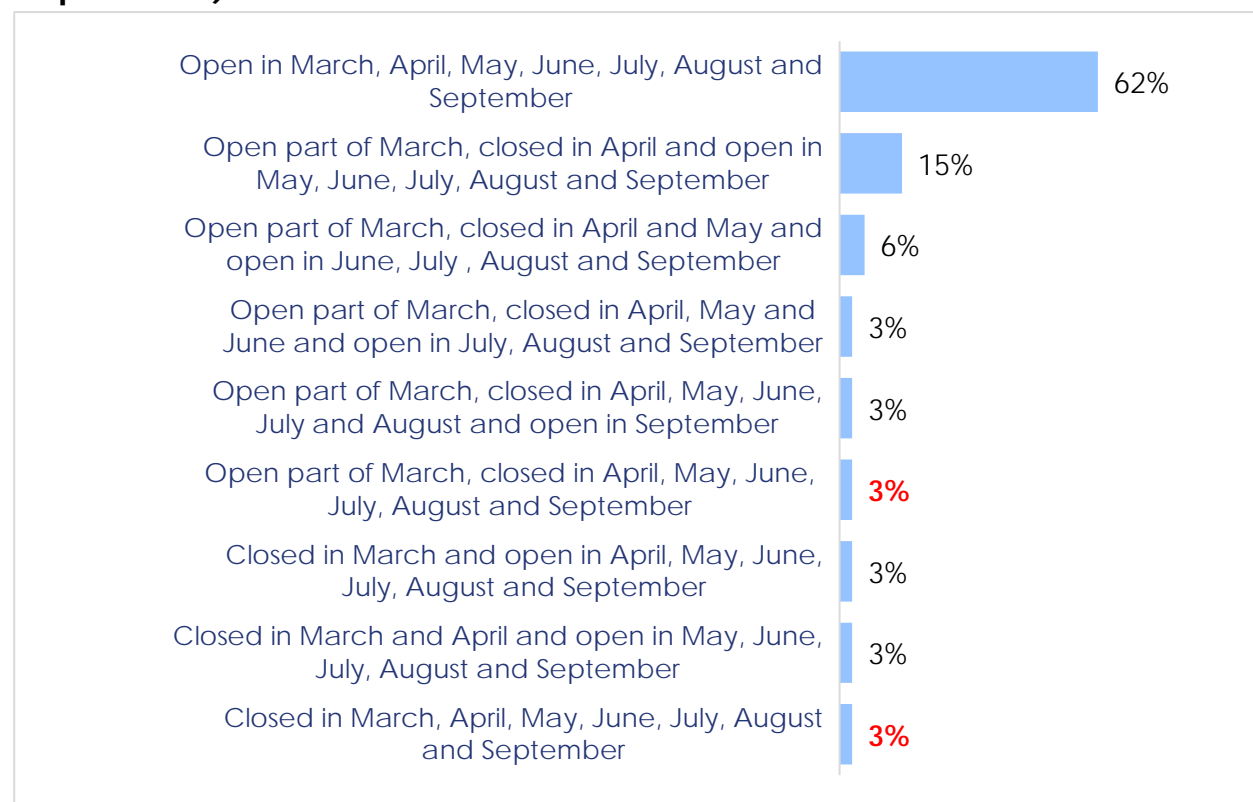
17. Which of the following most closely describes the impact of the COVID-19 measures adopted by the provincial government on the operation of your business?

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

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

- Six in ten (62%) re-contacted businesses surveyed were open in March, April, May, June, July, August and September, while 15% were open part of March, closed in April and open in May, June, July and August, and 6% were open part of March, closed in April and May and open in June, July, August and September.
- Six percent of re-contacted businesses surveyed were affected by COVID-19 and do not seem to have recovered including: 3% who were open part of March but were closed in April, May, June, July, August and September, and 3% who were not open for all seven months.
- In general, restaurants and bars, retail businesses (both those selling clothing and those selling products other than clothing), and stores selling groceries, markets, specialty foods, and alcoholic beverages were more likely to have remained open through all seven months or closed in March and/or April but open the rest of the months.

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



4. Was your business open in March? Base: All respondents (n=34)

6. Was your business operating in April? Base: All respondents (n=34)

8. Was your business open in May? Base: All respondents (n=34)

10. Was your business open in June? Base: All respondents (n=34)

12. Was your business open in July? Base: All respondents (n=34)

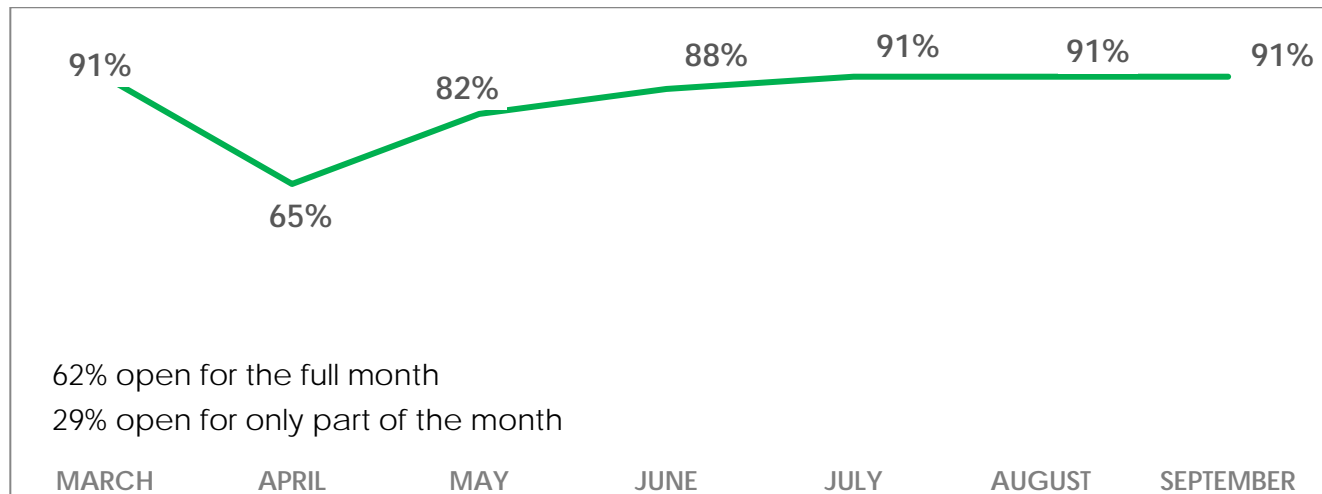
14. Was your business open in August? All respondents (n=34)

16. Was your business open in September? All respondents (n=34)

11.0 Business Open –Yes (Change over time)

- The COVID-19 measures had a big impact on the re-contacted businesses. There was a large drop in the number of businesses open in April, but this figure bounced back in May and by June, this number rebounded back to the level recorded in March.

Business Open –Yes (Change over time)



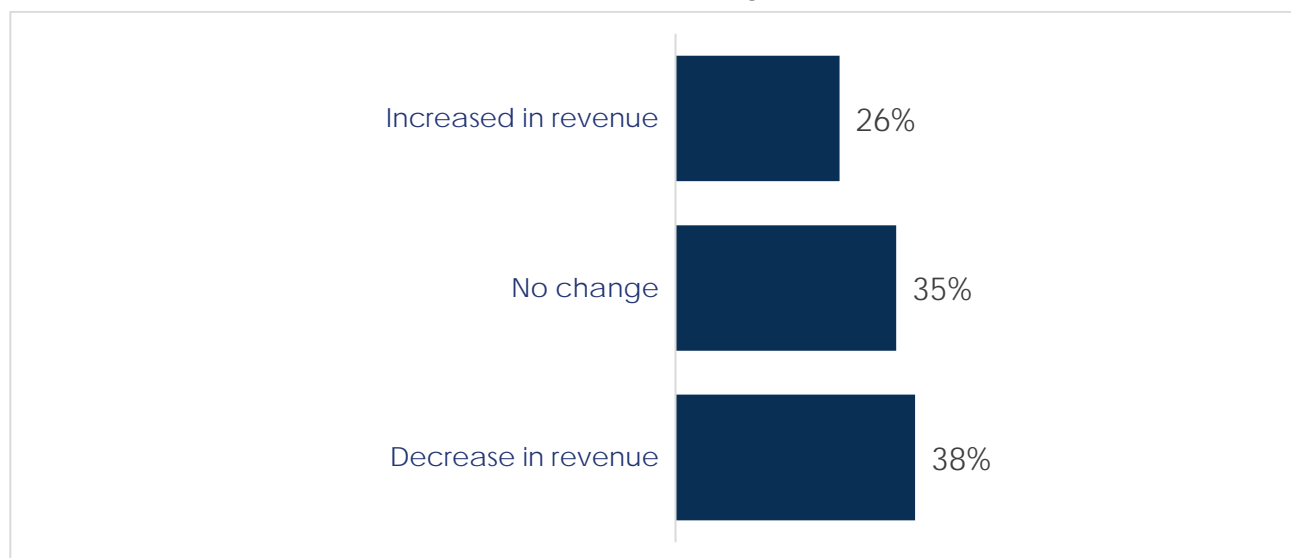
*The March figure is a combination of businesses who were open or partially open in March.

4. Was your business open in March? Base: All respondents (n=34)
 6. Was your business operating in April? Base: All respondents (n=34)
 8. Was your business open in May? Base: All respondents (n=34)
 10. Was your business open in June? Base: All respondents (n=34)
 12. Was your business open in July? Base: All respondents (n=34)
 14. Was your business open in August? All respondents (n=34)

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

- Four in ten (38%) re-contacted businesses surveyed experienced a decrease in business revenue in quarter 1 2020 compared to quarter 1 2019; while 26% saw an increase and 35% no change.
- On average, those who experienced a decrease, experienced a decrease of 28%; this figure is driven by restaurants and bars.
- On average, those who experienced an increase, experienced an increase of 24%.

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



Percentage of Revenue Increase/Decrease

	October
Increase	24%
Decrease	28%

18. Thinking about your business revenue in quarter 1 2020 compared to quarter 1 2019, did you experience...? Base: All respondents (n=34)

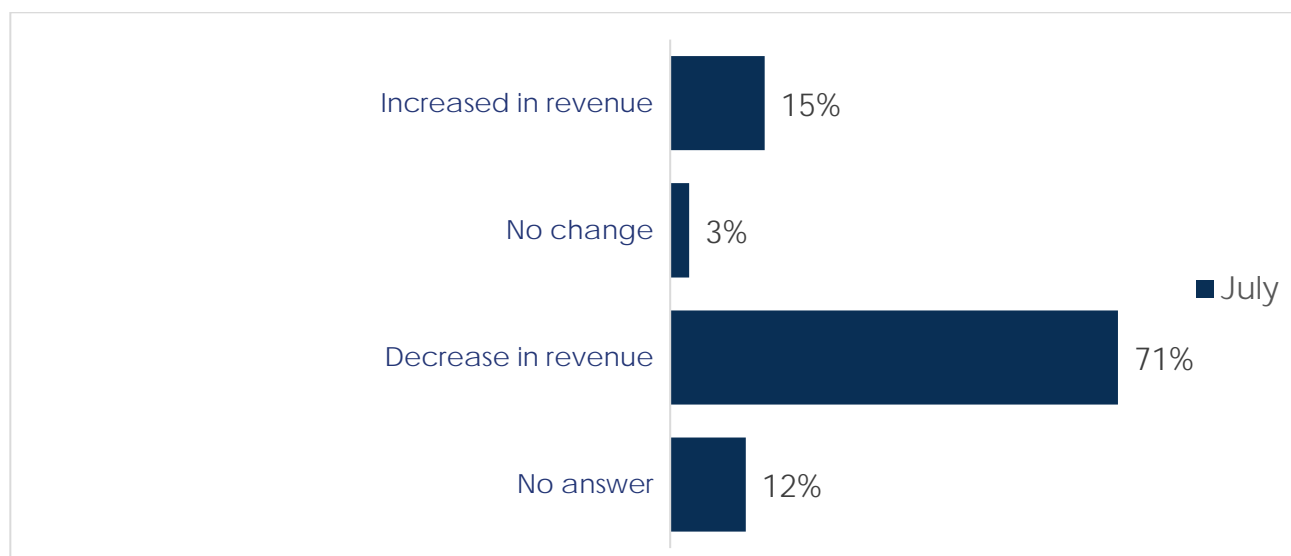
19. Approximately, by what percentage did your revenue increase? Base: Those who experienced an increase (n=9)

20. Approximately, by what percentage did your revenue decrease? Base: Those who experienced a decrease (n=13)

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

- Not surprisingly, the Covid-19 measures took the greatest toll on revenue in the second quarter of 2020 with revenues down considerably from the second quarter of 2019.
- Seven in ten (71%) of the re-contacted businesses surveyed experienced a decrease in business revenue in quarter 2 2020 compared to quarter 2 2019; while 15% saw an increase, 3% no change and 12% offered no answer.
- On average, those who experienced a decrease, experienced a decrease of 49%; this is driven by restaurants and bars and retail businesses selling products other than clothing.
- On average, those who experienced an increase, experienced an increase of 40%.

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



Percentage of Revenue Increase/Decrease

	October
Increase	40%
Decrease	49%

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

Base: All respondents (n=34)

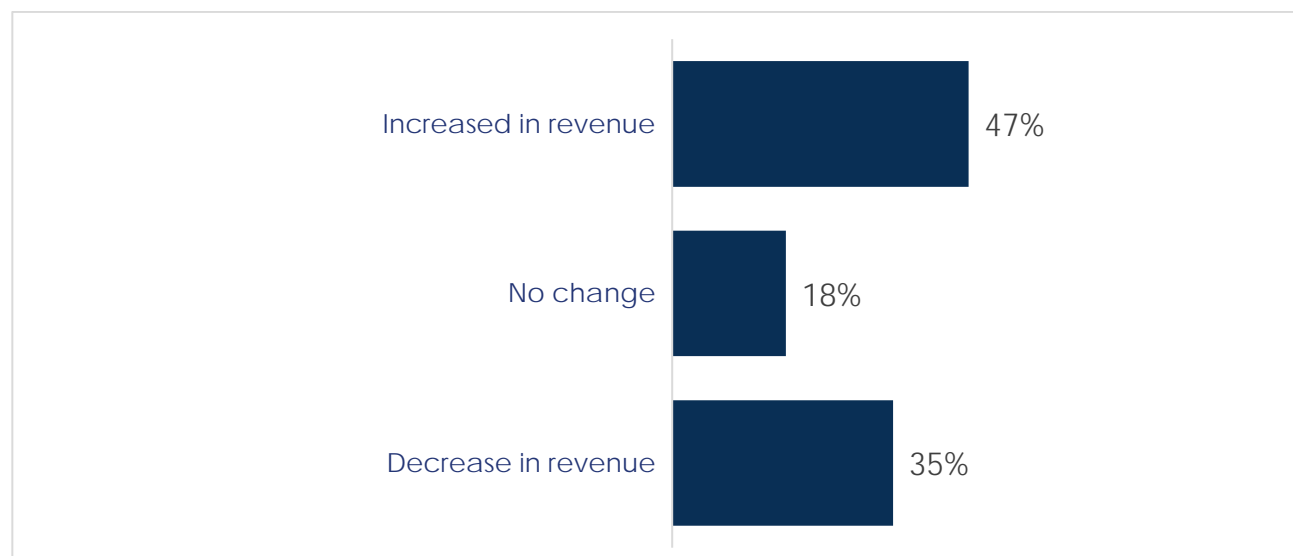
22. Approximately, by what percentage did your revenue increase? Base: Those who experienced an increase (n=5)

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

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

- One-third (25%) of the businesses surveyed experienced a decrease in business revenue in quarter 2 2020 compared to quarter 1 2020; while 47% saw an increase, and 18% no change.
- On average, those who experienced a decrease, experienced a decrease of 49%; this figure is driven by retail businesses selling products other than clothing and recreation, entertainment and cultural institutions.
- On average, those who experienced an increase, experienced an increase of 44%.

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



Percentage of Revenue Increase/Decrease

	October
Increase	44%
Decrease	49%

24. Thinking about your business revenue in quarter 2 2020 compared to quarter 1 2020, did you experience...?Base: All respondents (n=34)

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

26. Approximately, by what percentage did your revenue decrease? Base: Those who experienced a decrease (n=12)