City of Guelph Visitor Survey and Tourism Economic Impact Estimates

FINAL REPORT
NOVEMBER, 2016
Research Background

• One of the recommendations from DestinationNEXT under the goal Steward the Guelph Story is to measure and communicate the economic impact of tourism. To accomplish this initiative, RTO4 engaged Ipsos and PRISM Economics and Analysis to establish baseline economic impact data and key performance indicators (KPIs) that demonstrate the contribution of tourism to the City of Guelph and provide trackable measures that will allow ongoing monitoring of performance of the city’s tourism industry.

• The first step in the work was to consult with relevant stakeholders to identify the usefulness and availability of secondary data that can be used as well as to solicit input on the relevance, usefulness and feasibility of primary data to be collected among tourists/visitors to the City of Guelph via a visitors survey.

• A total of eight stakeholders were interviewed and provided input the availability of secondary data as well as input on design of the visitor survey.

<table>
<thead>
<tr>
<th>Name</th>
<th>Position/Title</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cathy Downer</td>
<td>Councillor Ward 5</td>
<td>City of Guelph</td>
</tr>
<tr>
<td>Ella Pauls</td>
<td>Manager</td>
<td>Cultural Affairs and Tourism, City of Guelph</td>
</tr>
<tr>
<td>Ian Panabaker</td>
<td>Corporate Manager</td>
<td>Downtown Renewal</td>
</tr>
<tr>
<td>Kevin Schmidt</td>
<td>General Manager</td>
<td>Delta Guelph Hotel &amp; Conference Centre</td>
</tr>
<tr>
<td>Kithio Mwanzia</td>
<td>President &amp; CEO</td>
<td>Guelph Chamber of Commerce</td>
</tr>
<tr>
<td>Marie Zimmerman</td>
<td>Executive Director</td>
<td>Hillside + Fab5 Festivals</td>
</tr>
<tr>
<td>Marty Williams</td>
<td>Executive Director</td>
<td>Downtown Guelph Business Association</td>
</tr>
<tr>
<td>Stacey Dungan</td>
<td>Supervisor</td>
<td>Tourism and Farmers' Market, City of Guelph</td>
</tr>
</tbody>
</table>
Visitor Survey Methodology

• The second step in the process was to design and execute a visitor survey in order to gather data on key indicators such as reason for visit, primary activities undertaken, and estimated spending during visit. For the purposes of the research, the scope of the visitor survey was limited to domestic, in-province visitors, which comprise over 80% of visitors to RTO4.

• The survey was conducted with a sample of n=551 Ontario residents 18 years of age and older who have visited the City of Guelph for a business, pleasure or personal trip within the past 12 months. For the purposes of the survey a visitor was defined those who reside at least 40 kms outside of Guelph. This reflects Ontario government’s standard definition of ‘tourist’. The outgoing sample was balanced by age, gender and region to reflect a representative sample of Ontario residents (excluding those residing within 40 kms of Guelph) according to most recent Census data.

• This survey was an average of 8 minutes in length. It was conducted online and sample was drawn from Ipsos’ Canadian online panel. The survey was fielded between June 9th and 15th, 2016.

• Throughout the report totals may not add to 100% due to rounding or because the question is a multi-select question, where respondents were permitted to choose more than one response.
Key Survey Findings

• Based on survey results, 15% of Ontarians visited Guelph in the past 12 months. There is a large amount of cross-over within the five main destinations in RTO4. Two-thirds (67%) of visitors to Guelph also visited at least one of Stratford, St. Jacobs, Elora/Fergus and Bayfield in the past 12 months.

• The largest proportion of visitors (49%) indicate that their most recent trip was between January and April 2016, while two in ten last visited between September and December 2015 and the same percentage last visited between June and August 2015.

• The vast majority (86%) of visits are for personal reasons (14% for business). Visiting friends or relatives, and visits to Downtown Guelph are the most frequent reasons for the trip.

• But even those who come to visit friends or relatives or come for business engage in tourism activities such as: visiting downtown Guelph, festivals or events, sporting events, historical or cultural museums or outdoor activities. About six in ten of both groups engage in these activities during their visit.

• Three in ten visitors stayed overnight. Among these, they stayed an average of 3.6 nights, and most stayed in a private home, while a third stayed in a hotel or motel.

• One-quarter of visitors visited Guelph on their own, while almost half visited with one other person. On average, visitors to Guelph spent $308 (including those who spent nothing).
Visitor Profile
City of Guelph Visitor Profile

- Mean age: 47.9
  - 18-34: 31%
  - 35-54: 27%
  - 55+: 42%

- Household Income
  - <$25K: 8%
  - $25K-$50K: 17%
  - $50K-$75K: 23%
  - $75K-$100K: 21%
  - $100K-$150K: 21%
  - $150K+: 10%

- Region
  - GTA: 50%
  - Southwestern Ontario: 37%
  - Central: 5%
  - East: 7%
  - North: 2%
Visitor Estimates

Number of Visitors

- Proportion of visitors to Guelph from each Ontario region is determined using provided postal codes through the survey. The number of visitors are then estimated by applying the share of visitors from each region in Ontario to the regions adult population.

<table>
<thead>
<tr>
<th>Region</th>
<th>Visitor Share of Total Population</th>
<th>Estimated Number of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Ontario</td>
<td>15%</td>
<td>1,611,448</td>
</tr>
<tr>
<td>Central</td>
<td>7%</td>
<td>57,897</td>
</tr>
<tr>
<td>East</td>
<td>8%</td>
<td>106,579</td>
</tr>
<tr>
<td>GTA</td>
<td>16%</td>
<td>788,619</td>
</tr>
<tr>
<td>North</td>
<td>8%</td>
<td>54,674</td>
</tr>
<tr>
<td>South West</td>
<td>21%</td>
<td>603,679</td>
</tr>
</tbody>
</table>
Visitors to Guelph

- An estimated over 2 million visitors travel to Guelph from different parts of Ontario in 2015.
  - Half were from the GTA
  - 1 in 5 residents in South West Ontario
Primary method of travel to Guelph

- The vast majority of visitors to Guelph (nine in ten) travelled to the City by car. Few travelled by train, rental car or plane.
Visitors staying overnight

- Three in ten visitors to Guelph stayed overnight on their most recent trip. Among these, they stayed, on average, 3.6 nights and half stayed in a private home, but a third stayed in a hotel or motel.

**Same-day or Overnight?**

- **Overnight**: 31%
- **Same-day**: 69%

**Number of Nights in City**

- Mean 3.6

**Type of Accommodation**

- **Private home**: 54%
- **Hotel or motel**: 35%
- **Bed and breakfast**: 4%
- **University dorm/campus facility**: 3%
- **Camping/campground**: 3%
- **Airbnb**: 1%
- **Other**: 5%

Q15. Was your most recent trip a same-day trip or did you stay overnight? Base: All Respondents (n=551)
Q16. In total, how many nights did you stay in Guelph? Base: Stayed Overnight In Guelph (n=170)
Q17. In what type of accommodation did you stay? Base: Stayed Overnight In Guelph (n=170)
Visitors staying overnight

- One third of all travellers to Guelph stay overnight.
- This share is highest among Friends and Family visitors (VFR) (39%), followed by Leisure visitors (34%).
- Only one quarter (24%) of Business travellers to Guelph stay overnight.
  - 72% of overnight Business visitors stay in hotels or motels; the remaining either stay with friends or relatives (17%), or at university dorm/campus facility (11%)

### Share of Overnight Visitors by Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR</td>
<td>39%</td>
</tr>
<tr>
<td>Leisure</td>
<td>34%</td>
</tr>
<tr>
<td>Business</td>
<td>24%</td>
</tr>
<tr>
<td>Other Personal</td>
<td>19%</td>
</tr>
</tbody>
</table>

### Type of Accommodation by Visitors Type

- **For holiday, leisure or recreation**
  - Hotel or motel: 67%
  - Airbnb: 10%
  - Private home (with friends or relatives): 7%
  - Other: 3%
  - Camping/campground: 13%

- **To visit friends or relatives**
  - Hotel or motel: 15%
  - Airbnb: 3%
  - Private home (with friends or relatives): 80%
  - Other: 3%

- **Other Personal**
  - Hotel or motel: 41%
  - Airbnb: 3%
  - Private home (with friends or relatives): 34%
  - Other: 3%
  - University dorm/campus facility: 17%

Q15. Was your most recent trip a same-day trip or did you stay overnight?
Q17. In what type of accommodation did you stay?
Purpose of most recent trip to Guelph

- Personal trips to Guelph outnumber business trips 6 to 1.
- Visiting friends and relatives is the most common reason to visit, followed by holiday, leisure or recreation, business, other personal reasons, to show and go to a conference, convention or trade show.

Q7. Was your most recent trip to Guelph primarily for business or personal reasons? Base: All Respondents (n=551)

Q8. What was the primary reason for the trip? Base: All Respondents (n=551)
Visitors Origin by Type of Visitors

- Half of Ontario visitors to Guelph are from the GTA.

### Personal Visitors Origin by Types of Visitors

- **For holiday, leisure, recreation**
  - Central: 1%
  - East: 5%
  - GTA: 32%
  - North: 2%
  - South West: 59%

- **To visit friends or relatives**
  - Central: 2%
  - East: 10%
  - GTA: 34%
  - North: 49%
  - South West: 2%

- **Other Personal reasons**
  - Central: 2%
  - East: 48%
  - GTA: 44%
  - North: 1%
  - South West: 1%
Four Distinct Guelph Visitor Categories

**Family and Friends Visitors**
Visiting friends or relatives who live in Guelph, many of which are students

**Leisure and Recreation Visitors**
Visit Guelph’s attractions, outdoor activities attend festivals and sporting events, etc.

**Other Personal Visitors**
Visit Guelph for downtown Guelph shopping, dining, site seeing, or attending conferences and other functions.

**Business Visitors**
Visit Guelph for business related activity such as regular sales or service, attending trade show, conventions etc.
Estimates of Spending

• Estimates of average per person spending are derived from the survey of n=551 Ontario residents. The survey asked respondents about spending during their stay in Guelph on each of the following categories:
  – accommodation
  – recreation and entertainment
  – transportation
  – food and beverage
  – Shopping

• Unique spending profiles were developed for different visitor types. Average per person spending estimates were applied to estimated number of visitors in each category.
Visitor Category Profiles

**Family and Friends Visitors**
- 700,000 visitors
- $114 = Average Spend/Visit

**Other Personal Visitors**
- 430,000 visitors
- $140 = Average Spend/Visit

**Leisure and Recreation Visitors**
- 255,000 visitors
- $182 = Average Spend/Visit

**Business Visitors**
- 220,000 visitors
- $271 = Average Spend/Visit
Visitors’ Spending
Total Spending by Category

- Visitors to Guelph collectively spend over $247.5 million a year on local accommodation, entertainment, restaurants and bars and other tourism related expenditures.
  - Close to 60% of travellers’ budget is spent on food and beverage and retail (shopping) combined
  - Transportation and accommodation expenses together consume one third (34%) of the budget
  - The remaining is expensed on recreation and entertainment

Source: Prism Economics
Visitor Spending Profiles

Family and Friends
- Recreation, $8
- Accommodation, $8
- Transportation, $15
- Shopping, $21
- Food and Beverage, $28
Spent $81 million in 2015

Other Personal Visitors
- Recreation, $3
- Transportation, $9
- Accommodation, $14
- Shopping, $17
- Food and Beverage, $17
Spent $60 million in 2015

Leisure and Recreation
- Recreation, $6
- Transportation, $9
- Accommodation, $9
- Shopping, $10
- Food and Beverage, $12
Spent $46 million in 2015

Business
- Recreation, $3
- Accommodation, $8
- Transportation, $12
- Shopping, $22
- Food and Beverage, $15
Spent $60 million in 2015
Guelph Tourism

ECONOMIC IMPACT AND KPI’S IN 2015
Economic Impact Summary
In 2015...

- An estimated over 1.6 million tourists traveled to Guelph.
- Travellers to Guelph collectively spent over $247.5 million on tourism related expenditure (local accommodation, restaurants and bars, transportation, entertainment, etc.)

Tourists’ spending:
- Stimulates close to $147 million in economic output in Guelph
- Supports the equivalent 2,320 fulltime local jobs
- Generates $390,000 additional municipal tax revenues
- Generates $96.8 million in wages and earnings
- Contributes $72.3 million in total government revenue
Economic Contributions by Visitors Category

Family and Friends Visitors
- 700,000 Visitors
- Spending $81M
- GDP $47M
- Jobs 770
- Income $31M
- Tax $121,000

Leisure and Recreation
- 255,000 Visitors
- Spending $46M
- GDP $29.6M
- Jobs 460
- Income $19.5M
- Tax $79,000

Other Personal Visitors
- 430,000 Visitors
- Spending $60M
- GDP $35.2M
- Jobs 530
- Income $23M
- Tax $95,000

Business Visitors
- 220,000 Visitors
- Spending $60M
- GDP $35.4M
- Jobs 550
- Income $23.4M
- Tax $94,000

*Reported taxes are estimates Municipal Taxes
Key Performance Indicators

- The following variables are identified as indicators of tourism activity in Guelph:

  - Attendance in Festivals
  - Attendance in Sport Events
  - Museum Attendance
  - Conference Attendance
  - Hotels Occupancy Rate
  - Other

- Change in these measures over time can be used as an indicator of change in the number of visitors to Guelph and consequently the level of tourism activity and its economic impact.

- Change in a specific variable could indicate change in one or more type of visitors. For example, an increase in hotels occupancy rate is more an indicator of potential increase in the number of business visitors than VFR visitors. These indicators are, therefore, weighted differently for different type of visitors (mainly based on the survey results) to help estimated the number of each type of visitors to Guelph.
### Translating Key Performance Indicators to Visitors

<table>
<thead>
<tr>
<th>Tourism Activity Drivers/Indicators</th>
<th>Visitor Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events and Festivals</td>
<td>Leisure and Recreation</td>
</tr>
<tr>
<td></td>
<td>Family and Friends</td>
</tr>
<tr>
<td></td>
<td>Other Pleasure</td>
</tr>
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<td></td>
<td>Business</td>
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<td>Museums Attendance</td>
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<td>Leisure and Recreation</td>
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<td>Other Pleasure</td>
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<td></td>
<td>Business</td>
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<tr>
<td>Conference Attendance</td>
<td>Business</td>
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<td></td>
<td>Other Pleasure</td>
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<tr>
<td>Hotels Occupancy Rate</td>
<td>Business</td>
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<td></td>
<td>Leisure and Recreation</td>
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<tr>
<td></td>
<td>Other Pleasure</td>
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<td>Guelph Enrolment</td>
<td>Family and Friends</td>
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<td>Leisure and Recreation</td>
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<tr>
<td>Guelph Population</td>
<td>Leisure and Recreation</td>
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<td>Family and Friends</td>
</tr>
<tr>
<td></td>
<td>Other Pleasure</td>
</tr>
<tr>
<td></td>
<td>Business</td>
</tr>
</tbody>
</table>
Data Sources and Tracked Measures

To gather data on tracked measures (listed in the next page), several event and festival organizers as well as other local establishments were contacted to obtain data and information for 2015 and 2016.

Missing information:

• While attendance in most major festivals and sport events in 2015 was obtained, there are several items that are not yet available or only partially available for 2016
• The hotel occupancy rate does not include the rate in downtown hotels
• No measure on retail sales in downtown restaurants and bars were available

The missing information can be obtained and the list expanded over time to track other indicators of tourism activity such as:

• count of cars parked outside the malls or in selected parking spaces across the city in selected specific days every year
• Count of downtown passengers in specific days per year using the downtown Wi-Fi system
• Nonlocals’ spending on retails (shopping, restaurants/bars) once the master card program is in place (expected date: January 2017)
# Data Sources and Tracked Measures

<table>
<thead>
<tr>
<th>Category</th>
<th>2015</th>
<th>2016</th>
</tr>
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<tbody>
<tr>
<td><strong>Hotels Occupancy Rate (excluding downtown hotels)</strong></td>
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<td>missing</td>
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<tr>
<td><strong>Retail Sales (Restaurants and Bars)</strong></td>
<td>✓</td>
<td>✓</td>
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<tr>
<td><strong>Tracked Festivals</strong></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Hillside Festival</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Summer (July 22-24)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Winter (January 29-31)</td>
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<td>missing</td>
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<tr>
<td>Jazz Festival</td>
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<tr>
<td>Dance Festival</td>
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<tr>
<td>Ribfest</td>
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<td>Film Festival</td>
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</tr>
<tr>
<td>Local Food Festival</td>
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<td>✓</td>
</tr>
<tr>
<td>Kazoo! Festival</td>
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<tr>
<td><strong>Tracked Sport Events</strong></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>University of Guelph Attendance in Events with Parents &amp; Spectators</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Sleeman Centre Attendance in Sport Events</td>
<td>✓</td>
<td>Partial</td>
</tr>
<tr>
<td><em>Storm Hockey</em></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><em>Special Olympics - opening &amp; closing ceremonies</em></td>
<td>✓</td>
<td>✓</td>
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<tr>
<td><em>Jr B Hockey</em></td>
<td>✓</td>
<td>✓</td>
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<tr>
<td><em>Cheerleading</em></td>
<td>✓</td>
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<td><em>UoG Homecoming</em></td>
<td>✓</td>
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<td><em>Remembrance Day</em></td>
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<td>✓</td>
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<tr>
<td><em>Alumni Game</em></td>
<td>✓</td>
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</tr>
<tr>
<td><em>Monster Trucks</em></td>
<td>✓</td>
<td>✓</td>
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<tr>
<td><em>GOGHL</em></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Museums</strong></td>
<td>✓</td>
<td>Partial</td>
</tr>
<tr>
<td><em>Guelph Civic Museums</em></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><em>McCrae House</em></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Tracked Conferences</strong></td>
<td>✓</td>
<td>Partial</td>
</tr>
<tr>
<td>University of Guelph Attendance in Conferences</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Key Performance Indicators

In 2015...

- Number of visitors: 1.6 Million
- Total Spending: $247.5M
- Attendance in Festivals: 50,300
- Attendance in Sport Events: 230,000
- Museum Attendance: 29,500
- Conference Attendance: 27,300
- Hotels Occupancy Rate: 58%

- **Next Step:**
  
  2016 KPIs are currently only partially available. Once they are available in whole, change in tourism activity since last year can be measured and 2016 tourism economic impact estimated.
# Visitors and $Average Spend

1. Leisure and Recreation  
2. Family and Friends  
3. Other Pleasure  
4. Business  

Tracked Activity  
- Attendance in Festivals  
- Attendance in Sport Events  
- Museum Attendance  
- Conference Attendance  
- Hotels Occupancy Rate  

Economic Impacts  
- GDP  
- Jobs
Additional Survey Results
Visitors’ Spending – Per Person

- Visitors seem to show different spending patterns based on their primary purpose for the trip
- On average, visitors to Guelph spend between just over $100 to close to $300 per person
  - Business visitors spend $271 on average while Personal visitors spend between $114 to $180
  - Spending over $180 on average, visitors who go to Guelph for holiday, leisure or recreation spend 30% more compared to other types of Personal visitors while those visiting friends or relatives spend the least
  - Spending on retail (shopping) comprises the largest spending category among business travellers and other personal visitors while spending on food and beverage makes up a significant share of VFR and Leisure visitors’ travel budget.

### Average Per Person Spending by Segment

<table>
<thead>
<tr>
<th>Spending Categories</th>
<th>Business</th>
<th>For holiday, leisure or recreation</th>
<th>To visit friends or relatives</th>
<th>Other Personal Visitors</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation (including overnight park fees)</td>
<td>$38</td>
<td>$36</td>
<td>$12</td>
<td>$32</td>
<td>$24</td>
</tr>
<tr>
<td>Recreation and Entertainment (including entrance/ user fees)</td>
<td>$12</td>
<td>$23</td>
<td>$11</td>
<td>$8</td>
<td>$12</td>
</tr>
<tr>
<td>Transportation</td>
<td>$53</td>
<td>$35</td>
<td>$21</td>
<td>$22</td>
<td>$28</td>
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<tr>
<td>Transportation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automobile Costs (gas/ parking)</td>
<td>$34</td>
<td>$21</td>
<td>$17</td>
<td>$19</td>
<td>$21</td>
</tr>
<tr>
<td>Travel Services (public/ private (i.e., bus/ taxi)</td>
<td>$12</td>
<td>$7</td>
<td>$2</td>
<td>$1</td>
<td>$4</td>
</tr>
<tr>
<td>Automobile Rental</td>
<td>$7</td>
<td>$7</td>
<td>$2</td>
<td>$2</td>
<td>$4</td>
</tr>
<tr>
<td>Food and Beverage</td>
<td>$67</td>
<td>$49</td>
<td>$40</td>
<td>$38</td>
<td>$45</td>
</tr>
<tr>
<td>Food and Beverage:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grocery/ Concession</td>
<td>$14</td>
<td>$16</td>
<td>$10</td>
<td>$20</td>
<td>$14</td>
</tr>
<tr>
<td>Restaurants/ Bars</td>
<td>$54</td>
<td>$32</td>
<td>$30</td>
<td>$19</td>
<td>$31</td>
</tr>
<tr>
<td>Shopping</td>
<td>$99</td>
<td>$40</td>
<td>$30</td>
<td>$40</td>
<td>$44</td>
</tr>
<tr>
<td>Total (MEAN)</td>
<td>$271</td>
<td>$182</td>
<td>$114</td>
<td>$140</td>
<td>$153</td>
</tr>
</tbody>
</table>

Q19. How many people, including yourself, went on this trip?
Q20. In total, how much did you and the people you were travelling with spend during entire your entire stay in Guelph on each of the following? Base: Personal n=475, Business n=76
The majority of visitors to Guelph also visited one of the four other key destinations in RTO4 in the past 12 months (67%); only one-third (33%) report visiting only Guelph. In fact, 35% report visiting Guelph and at least two of the other destinations in the same 12 month period.

Visited Guelph and other locations in P12M

- City of Guelph: 100%
- Stratford: 40%
- St. Jacobs: 35%
- Elora/ Fergus: 29%
- Bayfield: 13%

Overall incidence of at least one visit to Guelph in population is xx %

4. Within the past 12 months, have you visited any of the following locations for a business or pleasure trip?

Base: All Respondents (n=551)
Number of trips taken in P12M

- Most visitors to Guelph take multiple trips within a year. On average, visitors to Guelph have taken about 4.4 trips to Guelph in the past 12 months. On average, they have taken 3 trips to Elora/Fergus, 2.6 to Stratford, 2.4 to St. Jacobs and 2.2 to Bayfield.

5. How many trips did you take in total over the past 12 months?

Base: Have Visited In P12M (n=Varies)
Timing of most recent trip to Guelph

- Half of visitors to Guelph most recently visited the City between January and April 2016, while about two in ten each visited between September and December 2015 or between June and August of 2015. When it comes to the time of week of the visit, similar proportions of about half of those who stayed five days or less visited during the week or over a weekend.
Primary attraction

- Aside from those visiting relatives or friends, the most common primary “tourist” attraction was to visit a downtown Guelph establishment (primarily for shopping, dining, visiting the University of Guelph). Forty percent of personal visits (aside from VRF) are to visit downtown (this represents 18% of all visits).
- As many visitors come for a sporting event (including hockey, golf, baseball, soccer) as those that come for a specific festival or event (Hillside and dance competitions being most popular), or outdoor recreation.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To visit a downtown Guelph establishment</td>
<td>43%</td>
</tr>
<tr>
<td>To visit a specific festival or event</td>
<td>9%</td>
</tr>
<tr>
<td>For a sporting event</td>
<td>9%</td>
</tr>
<tr>
<td>For outdoor recreation</td>
<td>7%</td>
</tr>
<tr>
<td>House/ apartment/ condo hunting</td>
<td>6%</td>
</tr>
<tr>
<td>For a historical, or cultural museum or site</td>
<td>4%</td>
</tr>
<tr>
<td>Day trip/ leisure drive</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>18%</td>
</tr>
<tr>
<td>None</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q9. More specifically, was the primary reason for the trip....
Base: Main reason for their most recent trip to Guelph was personal and something other than visiting friends or relatives (n=233)
Incidence of engaging in tourism activities while visiting friends or relatives or visiting on business

- At least six in ten of those who visit Guelph for these purposes also engage in tourism activities while they are visiting (e.g. visit downtown, a festival or event, sporting event or outdoor recreation).

**Personal Trip**

- 66% Visited Family and Friends only
- 34% Visited Family and Friends, but also did tourism activities

**Business Trip**

- 62% Conducted business activities only
- 38% Also participated in tourism activities

Q11. Regardless of the primary reason, did you also do any of the following as part of your trip? Visit downtown Guelph, visit a festival or event, a sporting event, historical or cultural museums or outdoor recreation.

Base: Main reason for their most recent trip to Guelph was to visit family or friends (n=242)

Q11. Regardless of the primary reason, did you also do any of the following as part of your trip? Visit downtown Guelph, visit a festival or event, a sporting event, historical or cultural museums or outdoor recreation.

Base: Main reason for their most recent trip to Guelph was business (n=76)
Primary vs. Multiple activities in Guelph

- Two in ten of those whose primary reason to visit Guelph is for personal reasons (excluding those whose primary reason was to visit friends or relatives) engaged in multiple tourism activities (e.g., at least TWO of the following: visit downtown, visit a festival or event, sporting event, historical or cultural museum or outdoor recreation).

Q11. Regardless of the primary reason, did you also do any of the following as part of your trip?.. Visit downtown Guelph, visit a festival or event, a sporting event or outdoor recreation.
Base: Main reason for their most recent trip to Guelph was personal, but not to visit family or friends (n=233).
Breakdown of multiple activities

- In a follow-up question, visitors who visited for personal reasons other than visiting family or friends, were asked other than their primary reason, if they engaged in any of the other of five main tourism activities on their most recent trip. Most also report visiting Downtown Guelph.

<table>
<thead>
<tr>
<th>Other activities undertaken during visit</th>
<th>Total</th>
<th>Primary attraction to Guelph</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Downtown Guelph</td>
</tr>
<tr>
<td>Go to Downtown Guelph</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Go to a specific festival or event</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Go to a sporting event</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Go to a historical, or cultural museum</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>For outdoor recreation</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

Q11. Regardless of the primary reason, did you also do any of the following as part of your trip? Base: Main reason for their most recent trip to Guelph was personal? (n=475)
Likelihood to recommend Guelph

- One-quarter of visitors are promoters of Guelph (rating of 9 or 10 on likelihood to recommend the City to family, friends or colleagues), while one-third of visitors are detractors (rating of 0 to 6 on likelihood to recommend). The Net Promoter score is -8%. The Net Promoter score is much higher among those who visited Guelph for personal reasons than for business reasons. It is slightly higher among those who visited Guelph to visit family and friends than for leisure reasons.

Net promoter score is calculated by Subtracting the percentage of Detractors from the percentage of Promoters yields the Net Promoter Score, which can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter).

Q21. How likely is it that you would recommend Guelph to family, a friend or colleague?
Base: All Respondents (n=551)
Attended activities and direction of return visit

- Roughly one in ten report attending at least one of the most popular events and activities in Guelph (during the past 12 months).
- Visitors were asked to choose between three sets of options what they would do if they visited Guelph again. More than half say they will visit popular places rather than those off the beaten path. Six in ten say they will eat at places unique to Guelph rather than familiar chain restaurants. Seven in ten will stay at familiar chain hotels rather than those unique to Guelph.

### Attended in the Past 12 Months

<table>
<thead>
<tr>
<th>Event</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Food Fest</td>
<td>19%</td>
</tr>
<tr>
<td>Art on the Street</td>
<td>17%</td>
</tr>
<tr>
<td>Guelph Ribfest</td>
<td>15%</td>
</tr>
<tr>
<td>Hillside Festival (summer)</td>
<td>13%</td>
</tr>
<tr>
<td>College Royal</td>
<td>12%</td>
</tr>
<tr>
<td>Guelph Dance Festival</td>
<td>12%</td>
</tr>
<tr>
<td>Guelph Jazz Festival</td>
<td>12%</td>
</tr>
<tr>
<td>Hillside Inside (winter)</td>
<td>8%</td>
</tr>
<tr>
<td>Doors Open Guelph</td>
<td>8%</td>
</tr>
<tr>
<td>Guelph Film Festival</td>
<td>7%</td>
</tr>
</tbody>
</table>

### Likely to do if you Visit Guelph Again

<table>
<thead>
<tr>
<th>Activity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit places that are…</td>
<td></td>
</tr>
<tr>
<td>Popular</td>
<td>54%</td>
</tr>
<tr>
<td>Off the beaten path</td>
<td>46%</td>
</tr>
<tr>
<td>Eat at places that are…</td>
<td></td>
</tr>
<tr>
<td>Familiar (e.g., chain restaurants)</td>
<td>38%</td>
</tr>
<tr>
<td>Unique to Guelph (e.g., local eateries)</td>
<td>62%</td>
</tr>
<tr>
<td>Stay at places that are…</td>
<td></td>
</tr>
<tr>
<td>Familiar (e.g., chain hotels)</td>
<td>68%</td>
</tr>
<tr>
<td>Unique to Guelph (e.g., B&amp;B, Airbnb)</td>
<td>32%</td>
</tr>
</tbody>
</table>

Q26. Below is a list of some popular events and activities in Guelph. In the past 12 months have you attended any of the following? Base: All Respondents (n=551)

Q24. If you visit Guelph again which are you more likely to do? Base: All Respondents (n=551)
Aspects of recent visit

- Two in ten visitors to Guelph indicate that they posted comments or pictures about or from their trip on social media that identified they were in or at an event in Guelph. This figure is significantly higher among those aged 18 to 34 (35%), particularly compared to those aged 55 and older (6%).

- When asked if they used a list of sources to plan their trip to Guelph, the most commonly used sources were word-of-mouth, followed by Google or City of Guelph website. When asked to choose from a list of areas, the one they are most likely to associate with Guelph, just over half most associate the City with the University of Guelph.

**Posted comments/ pictures from trip on social media**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes %</th>
<th>No %</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>35</td>
<td>65</td>
</tr>
<tr>
<td>35-54</td>
<td>16</td>
<td>84</td>
</tr>
<tr>
<td>55+</td>
<td>6</td>
<td>94</td>
</tr>
</tbody>
</table>

**Strongest Association with Guelph**

- University of Guelph: 53%
- Nature/outdoors: 15%
- Great places to eat and drink: 12%
- Sports: 7%
- Historic sites: 7%
- Arts and cultural events: 5%

**Used Specific Sources in Planning trip to Guelph**

- Word of mouth/family and friend recommendations: 24%
- Google: 18%
- City of Guelph website: 13%
- Accommodation websites: 8%
- Visit Guelph website: 8%
- General travel websites (e.g., Expedia, trip advisor, etc.): 5%
- None of the above: 52%

Q22. During your visit, did you post any comments or pictures about or from your trip on social media (e.g., Facebook, Twitter, Instagram, Pinterest, etc.) that identified you were in Guelph or at an event held in Guelph? Q23. Did you use any of the following in planning your trip to Guelph?

Q25. Which of the following do you most associate with Guelph? Base: All Respondents (n=551)
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