

RT012

Resident Sentiment Study WAVE 1

December 2022



Research Objectives

- A key pillar of RTO12's Regenerative Strategy is the development of a Regional Tourism Data Hub, which will collect ongoing and timely intelligence regarding the overall health of the tourism industry. This data is particularly important as the RTO12 launches programs to help the tourism industry and communities recover and rebuild with long-term sustainability front and centre
- An online dashboard has been conceived to track business confidence, labour gaps & shortages, employee sentiment, resident sentiment, visitor sentiment and, eventually, environmental impact. A series of surveys will be launched to gather the benchmark intelligence to create the dashboard, which will be hosted on the RTO12 administrative site
- This report presents the outcome of **the first phase of a survey of residents of RTO 12** about their feelings toward the local tourism industry. The objective of this survey is to gauge the level of local support for the industry and to identify potential areas of concern on the part of a key stakeholder audience
- We recommend repeating this survey on an annual basis to track changes in sentiment over time, especially as key planks in RTO 12's BOP are executed





Highlights - Resident Sentiment Study

- A telephone survey consisting of 19 tourism sentiment measures (15 “positive” sentiment measures and 4 “negative” sentiment measures) was deployed in the fall of 2022. There were 455 respondents from RTO 12
- RTO 12 scores exceptionally well on tourism sentiment measures that indicate general acceptance of the industry and its impact on the community. For example, 92% of respondents said that overall tourism is good for their town while 91% say local tourism promotion benefits their community economically. An overwhelming majority, 80%, say the good outweighs the bad when it comes to tourism in the region
- Only one “negative” sentiment measure scored high: 82% of respondents say tourism contributes to traffic and parking problems. This is a universal complaint that is not unique to the region
- Sentiment measures relating to the hyperlocal impact of tourism (overcrowding and noise) show the most pronounced polarity. While 54% of respondents say the region has become overcrowded thanks to tourism, a large percentage, 43% strongly disagree. Similarly, while 40% of respondents say tourists cause too much noise, 55% strongly disagree
- There was little variation in sentiment across the four major towns in the region with one exception: Parry Sound respondents are scored higher on 5 of the “positive” sentiment measures, and they were more likely to score lower on the “negative” sentiment measures
- Female respondents, while still positive, were generally less enthusiastic than males. They gave lower scores on 13 of the 15 “positive” sentiment measures and higher scores on 3 of the 4 “negative” sentiment measures
- While all ages groups are generally very positive about tourism in the region, the youngest respondents (18-34) gave tourism its highest sentiment ratings



Detailed Findings

Research Methodology and Sample Size

- An telephone survey consisting of a battery of 19 tourism sentiment measures was deployed in the fall of 2022 with the assistance of Environics. The survey took an average of 10 minutes to complete
- There 15 “positive” sentiment measures and 4 “negative” sentiment measures
- The survey targeted cell and landlines located in the RTO 12 geographic area
- **455 respondents** completed the resident sentiment survey. This is a very robust sample size
- Summary tables of the survey responses were prepared by Environics. This analysis was prepared by Kuration



Respondent Profile (n=455)

REGION

Bracebridge	28%
Gravenhurst	15%
Huntsville	36%
Parry Sound	16%
Other	5%

AGE

18-34	15%
35-49	21%
50+	64%
Total	100%

EDUCATION

High School or less	28%
College	31%
University	23%
Post Grad	17%

RELATIONSHIP

Single	20%
Married	62%
Separated / Divorced	8%
Widow / Widower	10%

SEX

Male	49%
Female	51%

HOUSEHOLD INCOME

\$25K < \$50K	18%
\$50K < \$75K	16%
\$75K < \$100K	15%
\$100K < \$150K	11%
\$150K < \$200K	8%
\$200K+	4%



Sentiment Measures



Sentiment Measures with Top 2 Box > 80%

Sentiment Measure	Top 2 Box	Bottom 2 Box
Overall, tourism is good for my town or area where I live	92%	7%
Local tourism promotion benefits my community economically	91%	7%
Tourism attracts new businesses to our area	87%	11%
Tourist spending helps support the tax base in this region	85%	9%
Tourists add to traffic congestion and parking problems around here	82%	16%
The return of local tourism will help my area recover economically from COVID-19 disruptions	81%	15%
The overall benefits of tourism outweigh the negative impacts	80%	15%

- RTO 12 scores exceptionally well on the tourism sentiment measures that indicate general acceptance of the industry and its impact on the community
- Almost all respondents say the industry is good for their town and that it benefits their town. An overwhelming majority say the good outweighs the bad when it comes to tourism in the region
- Only one "negative" sentiment measure is found in this group: 82% of respondents say tourism contributes to traffic and parking problems (a universal complaint that is not unique to the region)

Sentiment Measures with Top 2 Box - 60% to 80%

Sentiment Measure	Top 2 Box	Bottom 2 Box
I support building new tourism facilities that will attract visitors to this area	73%	23%
I have more recreational opportunities, places to go and things to do, because of tourism in this area	72%	25%
Tourists cause increased pollution in my area	70%	26%
We should develop/host more major events to attract tourists to our area each year	70%	27%
Increased tourism improves the quality of life for residents in my area	69%	28%
I support local governments increasing the budget for advertising to encourage tourists to visit our area	67%	30%
I like to participate in local tourism activities in my area	65%	32%
Accommodation-sharing services like Airbnb provide economic opportunities for residents	63%	30%
There are opportunities for career advancement in the tourism industry	62%	23%

- With this group of sentiment measures, while the region still scores well, we start to see a little more polarity in responses
- Sentiment measures that relate to expansion of the industry, not surprisingly, are found in this group

Sentiment Measures with Top 2 Box - less than 60%

Sentiment Measure

The region has become overcrowded because of more tourists

There are job opportunities in the tourism industry with desirable pay and benefits

Tourists cause too many noise disturbances/loud gatherings

Top 2 Box

54%

50%

40%

Bottom 2 Box

43%

35%

55%

- Of the 19 sentiment measures, only 3 have top box less than 60%. Two of these sentiment measures are negative, so the lower top box scores is good
- The hyperlocal impact of tourism (overcrowding and noise) shows up in this group, and shows the most pronounced polarity. While 54% of respondents say the region has become overcrowded thanks to tourism, a large percentage, 43% strongly disagree. Similarly while 40% of respondents say tourists cause too much noise, 55% strongly disagree
- Only 50% of respondents say there are job opportunities in the industry with desirable pay and benefits, no doubt reflecting reality



Sentiment Measures by Location (Top 2 Box)

Sentiment Measure	RTO12	Bracebridge	Gravenhurst	Huntsville	Parry Sound
Overall, tourism is good for my town or area where live	92%	92%	90%	93%	93%
Local tourism promotion benefits my community economically	91%	94%	90%	93%	89%
Tourism attracts new businesses to our area	87%	87%	83%	88%	91%
Tourist spending helps support the tax base in this region	85%	89%	86%	84%	81%
Tourists add to traffic congestion and parking problems around here	82%	82%	80%	85%	85%
The return of local tourism will help my area recover economically from COVID-19 disruptions	81%	79%	74%	84%	89%
The overall benefits of tourism outweigh the negative impacts	80%	78%	78%	81%	88%
I support building new tourism facilities that will attract visitors to this area	73%	75%	65%	70%	82%
I have more recreational opportunities, places to go and things to do, because of tourism in this area	72%	74%	72%	70%	76%
Tourists cause increased pollution in my area	70%	66%	68%	76%	65%
We should develop/host more major events to attract tourists to our area each year	70%	73%	64%	65%	80%
Increased tourism improves the quality of life for residents in my area	69%	67%	62%	71%	77%
I support local governments increasing the budget for advertising to encourage tourists to visit our area	67%	67%	65%	61%	82%
I like to participate in local tourism activities in my area	65%	71%	62%	62%	68%
Accommodation-sharing services like Airbnb provide economic opportunities for residents	63%	68%	51%	62%	68%
There are opportunities for career advancement in the tourism industry	62%	68%	67%	60%	53%
The region has become overcrowded because of more tourists	54%	55%	52%	62%	41%
There are job opportunities in the tourism industry with desirable pay and benefits	50%	52%	46%	52%	45%
Tourists cause too many noise disturbances/loud gatherings	40%	37%	48%	43%	24%

- There was little variation in sentiment across the four major towns in the region with one exception: Parry Sound respondents are scored higher on 5 of the “positive” sentiment measures, and they were more likely to score lower on the “negative” sentiment measures

Sentiment Measures by Gender (Top 2 Box)

Sentiment Measure	All	Male	Female
Overall, tourism is good for my town or area where live	92%	94%	90%
Local tourism promotion benefits my community economically	91%	92%	90%
Tourism attracts new businesses to our area	87%	88%	85%
Tourist spending helps support the tax base in this region	85%	87%	83%
Tourists add to traffic congestion and parking problems around here	82%	79%	86%
The return of local tourism will help my area recover economically from COVID-19 disruptions	81%	82%	80%
The overall benefits of tourism outweigh the negative impacts	80%	83%	78%
I support building new tourism facilities that will attract visitors to this area	73%	80%	67%
I have more recreational opportunities, places to go and things to do, because of tourism in this area	72%	76%	67%
Tourists cause increased pollution in my area	70%	68%	72%
we should develop/host more major events to attract tourists to our area each year	70%	74%	65%
Increased tourism improves the quality of life for residents in my area	69%	73%	66%
I support local governments increasing the budget for advertising to encourage tourists to visit our area	67%	72%	61%
I like to participate in local tourism activities in my area	65%	65%	65%
Accommodation-sharing services like Airbnb provide economic opportunities for residents	63%	63%	63%
There are opportunities for career advancement in the tourism industry	62%	65%	58%
The region has become overcrowded because of more tourists	54%	51%	58%
There are job opportunities in the tourism industry with desirable pay and benefits	50%	54%	46%
Tourists cause too many noise disturbances/loud gatherings	40%	41%	39%

- It is interesting to note that female respondents, while still positive, were generally less enthusiastic than males. They gave lower scores on 13 of the 15 “positive” sentiment measures and higher scores on 3 of the four “negative” sentiment measures
- When it comes to job opportunities with desirable pay and benefits, there was 8 point gap between men and women

Sentiment Measures by Age (Top 2 Box)

Sentiment Measure	All	18-34	35-49	50+
Overall, tourism is good for my town or area where I live	92%	93%	96%	90%
Local tourism promotion benefits my community economically	91%	97%	95%	89%
Tourism attracts new businesses to our area	87%	90%	89%	85%
Tourist spending helps support the tax base in this region	85%	88%	83%	84%
Tourists add to traffic congestion and parking problems around here	82%	86%	84%	81%
The return of local tourism will help my area recover economically from COVID-19 disruptions	81%	83%	85%	79%
The overall benefits of tourism outweigh the negative impacts	80%	88%	82%	78%
I support building new tourism facilities that will attract visitors to this area	73%	86%	78%	69%
I have more recreational opportunities, places to go and things to do, because of tourism in this area	72%	86%	71%	69%
Tourists cause increased pollution in my area	70%	75%	77%	66%
We should develop/host more major events to attract tourists to our area each year	70%	81%	74%	66%
Increased tourism improves the quality of life for residents in my area	69%	70%	76%	67%
I support local governments increasing the budget for advertising to encourage tourists to visit our area	67%	67%	67%	67%
I like to participate in local tourism activities in my area	65%	75%	73%	60%
Accommodation-sharing services like Airbnb provide economic opportunities for residents	63%	71%	76%	56%
There are opportunities for career advancement in the tourism industry	62%	74%	65%	57%
The region has become overcrowded because of more tourists	54%	54%	58%	53%
There are job opportunities in the tourism industry with desirable pay and benefits	50%	59%	46%	49%
Tourists cause too many noise disturbances/loud gatherings	40%	29%	44%	41%

- While all ages groups are generally very positive about tourism in the region, the youngest respondents (18-34) gave tourism its highest sentiment ratings. This group rated tourism higher on all 15 of the “positive” sentiment measures
- Interesting to note that younger respondents are more concerned about the impact of tourism on the environment with 75% saying it causes increased pollution versus only 66% of 50+