CONTEXT IS EVERYTHING

KINCARDINE TOURISM STRATEGY – RESIDENT SENTIMENT SURVEY

Final Report

Prepared for: Municipality of Kincardine & RTO7

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CONTEXT IS EVERYTHING

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KEY OBJECTIVES

Overview:
CRG worked collaboratively with the Municipality of Kincardine and Regional Tourism Organization 7 (RTO7) to conduct a three-survey research program (residents, visitors and businesses) supporting the development of Kincardine's Tourism Strategy. This report presents the Resident Sentiment Survey, which measures how residents experience and perceive tourism in their community. Findings are designed to give the Municipality a credible, community-grounded evidence base to grow tourism responsibly, extend it across the seasons and protect the community values that define the destination.

Objectives:
The objectives of this survey are to evaluate:

- Overall resident sentiment toward tourism, alignment with community values and pride in the destination
- Tourism's impact on daily life and quality of life, including traffic, parking, crowding and access to amenities in peak and off-peak seasons
- Perceptions of tourism's economic contribution and how broadly its benefits are shared
- Perceived pressure on infrastructure, municipal services and natural areas
- Appetite for tourism growth by season and type, and resident tolerance thresholds
- Resident–visitor relations and Kincardine's identity as a welcoming community
- Implications for the Tourism Strategy, including resident involvement in tourism planning and measures to track resident sentiment over time



METHODOLOGY

Methodology:
- Self-administered survey available online (CAWI, open-link) and in paper format

Qualifying Criteria:
- Aged 16 or older
- Lives in, seasonally occupies a property in, or temporarily works in the Municipality of Kincardine

Distribution:
- Survey distributed and promoted by the Municipality of Kincardine through its communications and outreach channels

Total Sample:
- Residents: n=713

Fieldwork Date:
- June 22nd – September 7th, 2026

Median Length of Interview:
- 15.6 minutes



METHODOLOGY

Rounding:
Due to rounding, the numbers may not add up to the totals. For example, the sum of all values may add up to 99% or 101%.

Significance Testing:
- Each segment is compared with the rest of residents at the 95% confidence level, adjusted for the effect of weighting.
- Proportions are compared using two-tailed tests.

Weighting:
The results were weighted age and gender to reflect the composition of the Municipality's resident population.

Small Sample Sizes:
Segment bases are weighted counts. Segments with a weighted base under 30 are marked with an asterisk and not tested; results should be interpreted with caution.



DEFINITIONS

Resident: Lives in, seasonally occupies a property in, or temporarily works in the Municipality of Kincardine (Q1). Temporary workers (2.6%) are included in Overall but not shown separately because of small sample size.

Resident type: Year-round residents vs. seasonal residents (second home or cottage owners).

Age: 16–34, 35–54 and 55+.

Years in Kincardine: Under 6 years, 6–20 years and more than 20 years (Q2).

Community: The town of Kincardine vs. the rest of the municipality (Tiverton, Underwood, Armow, Inverhuron, rural and other areas) (Q3).

Tourism sector: Works in or owns a business in the tourism sector vs. does not (Q6). Unsure, not employed and retired residents are included in Overall only.

Tourism sentiment: Feels very or somewhat positive about tourism in Kincardine vs. neutral or negative (Q12).

Ethnicity: BIPOC (Black, Indigenous and People of Colour) vs. Caucasian (D1).

Gender: Women vs. men (Q5).

TOP2: The combined percentage selecting the two most positive responses on a five-point scale (e.g., somewhat and very satisfied).

BTM2: The combined percentage selecting the two most negative responses on a five-point scale.

▲ / ▼: Significantly higher or lower than the rest of residents, at the 95% confidence level.

ALIGNMENT WITH DESTINATION CANADA'S WEALTH & WELLBEING INDEX

Methodology | Resident sentiment scorecard

The resident scorecard is built to connect with Destination Canada's Wealth & Wellbeing Index.

The Index tracks tourism's impact across six areas: Economy, Employment, Enablement, Environment, Engagement and Experience.

It is reported nationally and provincially, so the scorecard uses local equivalents rather than Index scores.

Each indicator was matched to the closest Index category. Most fall under Engagement (community openness) and Enablement (quality of life), with support for growth under Economy.

Scorecard rows (slide 12) follow the order of this table.

Index sub-index	Index category	Kincardine scorecard indicator
Engagement	Community Openness	Tourism important to the local economy
	Community Openness	Positive about tourism
	Community Openness	Growth and quality of life can coexist
	Community Openness	Tourism benefits shared broadly
	Community Openness	Level of tourism about right
	Community Openness	Peak season same or better than rest of year
	Cultural Representation	Strong sense of belonging
Enablement	Quality of Life	Quality of life good / excellent
	Quality of Life	Infrastructure keeps pace with peak
Economy	Tourism Growth / Yield	Support tourism growth in the fall
	Tourism Growth / Yield	Support tourism growth in summer

Source: Destination Canada, Tourism's Wealth & Wellbeing Index. Indicator mapping by CRG.



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – RESIDENT SENTIMENT

ALL RESIDENTS

Residents are broadly content with life in Kincardine and lean positive on tourism. Nearly eight in ten (78%) rate their quality of life as good or excellent, and 78% say tourism is important to the local economy. Just over half (52%) feel positive about tourism, with 22% neutral and 25% negative. Seasonal residents are the most positive (72%), and residents aged 16–34 are more measured (43%). (See slides 14, 20, 21)

Residents recognize tourism's benefits most clearly for local events and business, with room to build its community value. More than eight in ten agree tourism supports local events (83%) and local businesses (82%), and around half agree it brings people together (55%) and that its economic benefits are shared broadly across the community (50%). Among those with closing comments, the cost of tourism to taxpayers is the most common theme (14%), suggesting residents want to see the net benefit made visible. (See slides 22, 51)

Most longer-term residents feel quality of life has held steady or improved. Two-thirds (67%) of residents of four or more years say quality of life has stayed about the same (43%) or improved (24%) over the past three years, while 33% say it has worsened. Those who see improvement most often point to more events and things to do (50%); those who see change for the worse most often mention council and municipal decisions (34%), crowding (33%) and local shopping options (28%). (See slides 17, 18)

Views on tourism and on daily life move together. Residents who feel positive about tourism rate their quality of life higher than those who are neutral or negative (90% vs. 65%), and they are more supportive of growth in every season. Year-round residents, residents of 20+ years and those aged 35–54 tend to be more measured, and are the groups where improvements to the day-to-day experience would do most to broaden support. (See slides 14, 31)



EXECUTIVE SUMMARY – PEAK SEASON, INFRASTRUCTURE AND WELCOME

ALL RESIDENTS

Most residents feel the summer peak is working, and are watching the level of visitation closely. Half of residents (49%) say the current level of tourism is about right and 35% say it is too high, with seasonal residents the most comfortable with current levels (66% about right). Six in ten (59%) describe life during July and August as the same as or better than the rest of the year, and 44% support growing summer tourism. (See slides 29, 30, 41)

Peak-season infrastructure is residents' clearest priority. More than eight in ten agree tourism places demands on beaches and waterfront access (86%), parking (84%), roads and traffic (81%) and waste management (81%). Views on whether infrastructure currently keeps pace with the peak are balanced (37% agree, 44% disagree). Parking and traffic (59%), waste management and cleanliness (58%) and public washrooms (55%) are residents' top priorities for managing tourism. (See slides 25, 27, 34)

Kincardine's welcoming identity is strong. Most residents agree they play an important role in welcoming visitors (83%) and that Kincardine has a reputation as a welcoming community (77%), and 59% describe their interactions with visitors as positive, rising to 68% among residents aged 55+. Residents aged 16–34 (45% positive interactions) and residents of fewer than six years (63% strong sense of belonging) are groups where engagement can be built further. (See slides 37, 38, 39)



EXECUTIVE SUMMARY – GROWTH, SEASONALITY AND RESIDENT VOICE

ALL RESIDENTS

Residents support growth across the year, especially in the shoulder seasons. Around six in ten support growing tourism in the fall (65%), spring (61%) and winter (59%), and 44% support summer growth. Two-thirds (66%) believe growth and a good quality of life can coexist, and around four in ten residents who are neutral or negative toward tourism support growth outside summer. (See slides 30, 31, 35)

Off-season growth can enhance life for residents as well as visitors. Residents rate their quality of life highest in the fall (85% good or excellent) and spring (78%), and winter (48%) offers the most room to grow. Family-friendly activities (64%), holiday-themed programming (61%) and winter recreation (59%) lead the off-season offerings residents would like to see. Over half (54%) are already aware of current off-season offerings, a base to build on, particularly among residents aged 16–34 (38%). (See slides 33, 42, 44)

Residents want a voice in tourism planning and an active role for the Municipality. Eighty-three percent say resident input into tourism planning is important, and one in three (33%) feel the Municipality currently considers residents' needs well. Large majorities support the Municipality actively managing tourism to protect quality of life (83%) and investing in infrastructure for responsible growth (73%), and 38% agree it currently balances growth and residents' needs well. (See slides 47, 48, 49)

RESIDENT SENTIMENT SCORECARD

All residents | Segments are defined on slide 6

Eleven indicators set a baseline for tracking resident sentiment as the Tourism Strategy is implemented.

The scorecard brings together quality of life, sentiment, growth support and the peak-season experience, supporting the alignment with Destination Canada's Wealth and Wellbeing Index set out at project kick-off.

Quality of life (78%), recognition of tourism's economic role (78%) and sense of belonging (72%) are clear strengths.

Infrastructure keeping pace with the peak season (37%) has the most room to grow, making it a key measure to move.

Seasonal residents score higher than year-round residents on almost every indicator.

		AGE			RESIDENT TYPE		COMMUNITY	
Indicator	Overall (n=709)	16–34 (n=160)	35–54 (n=201)	55+ (n=347)	Year-round (n=587)	Seasonal (n=103)	Town (n=577)	Rest of munic. (n=131)
Tourism important to the economy	78%	78%	77%	78%	76% ▼	90% ▲	77%	81%
Positive about tourism	52%	43% ▼	56%	55%	49% ▼	72% ▲	53%	50%
Growth and quality of life can coexist	66%	61%	68%	68%	65%	78% ▲	65%	73%
Tourism benefits shared broadly	50%	54%	49%	50%	48% ▼	71% ▲	51%	48%
Level of tourism about right	49%	44%	47%	53%	47% ▼	66% ▲	50%	47%
Peak season same or better than rest of year	59%	56%	60%	60%	55% ▼	79% ▲	60%	56%
Strong sense of belonging	72%	67%	70%	76% ▲	73%	80%	75% ▲	62% ▼
Quality of life good / excellent	78%	74%	70% ▼	85% ▲	77%	92% ▲	78%	76%
Infrastructure keeps pace with peak	37%	42%	31%	38%	33% ▼	61% ▲	36%	42%
Support growth in the fall	65%	63%	71%	63%	64%	78% ▲	65%	68%
Support growth in summer	44%	38%	47%	45%	42%	55% ▲	42%	52%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=655–712). Q8, Q11, Q12, Q13, Q14, Q17, Q19, Q20, Q23, Q26. Segment bases shown for Q8.



QUALITY OF LIFE

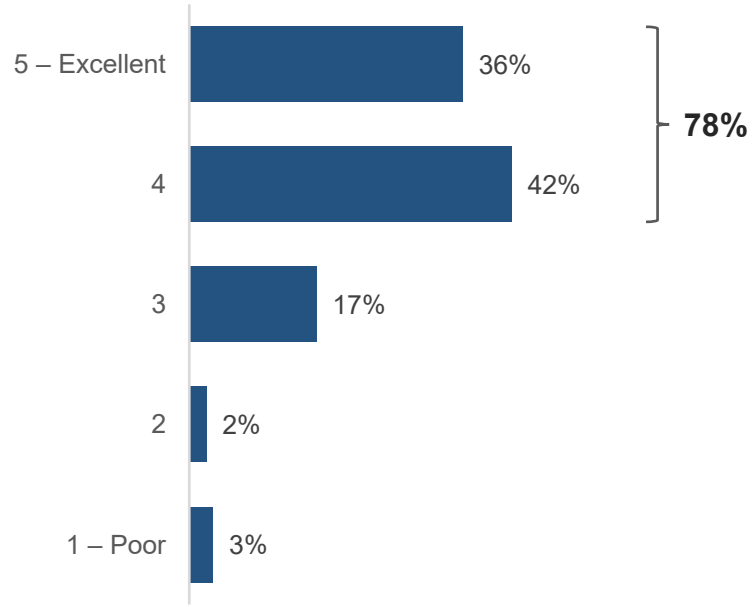
OVERALL QUALITY OF LIFE

All residents | Segments are defined on slide 6

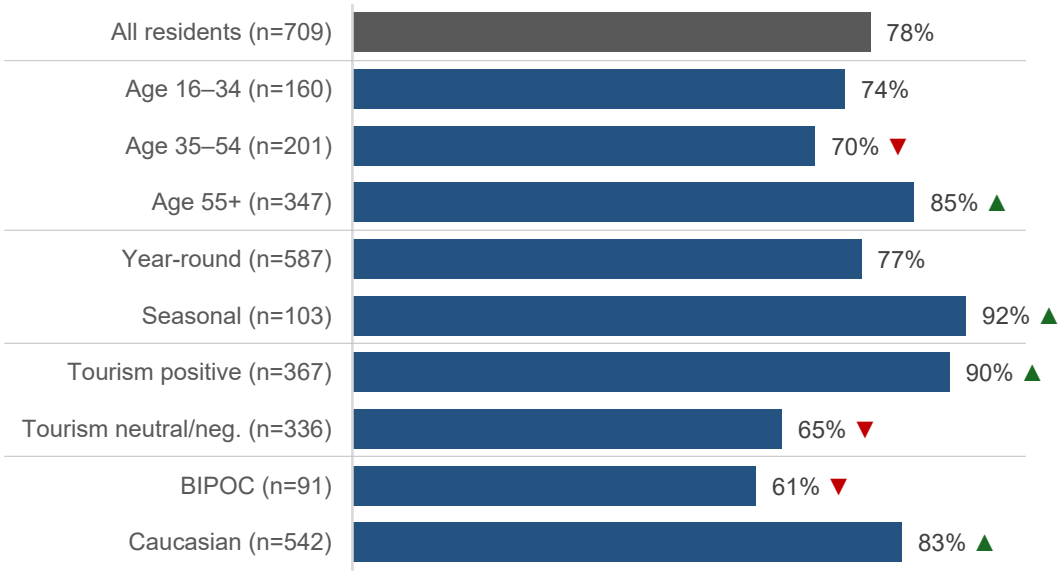
Most residents rate their quality of life highly, and it is closely tied to how they feel about tourism.

Nearly eight in ten (78%) rate their quality of life a 4 or 5 out of 5, including 36% who rate it excellent. Ratings are highest among seasonal residents (92%) and those aged 55+ (85%), and somewhat lower among residents aged 35–54 (70%) and BIPOC residents (61%). Residents who feel positive about tourism rate their quality of life higher than those who are neutral or negative (90% vs. 65%).

ALL RESIDENTS



GOOD / EXCELLENT (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

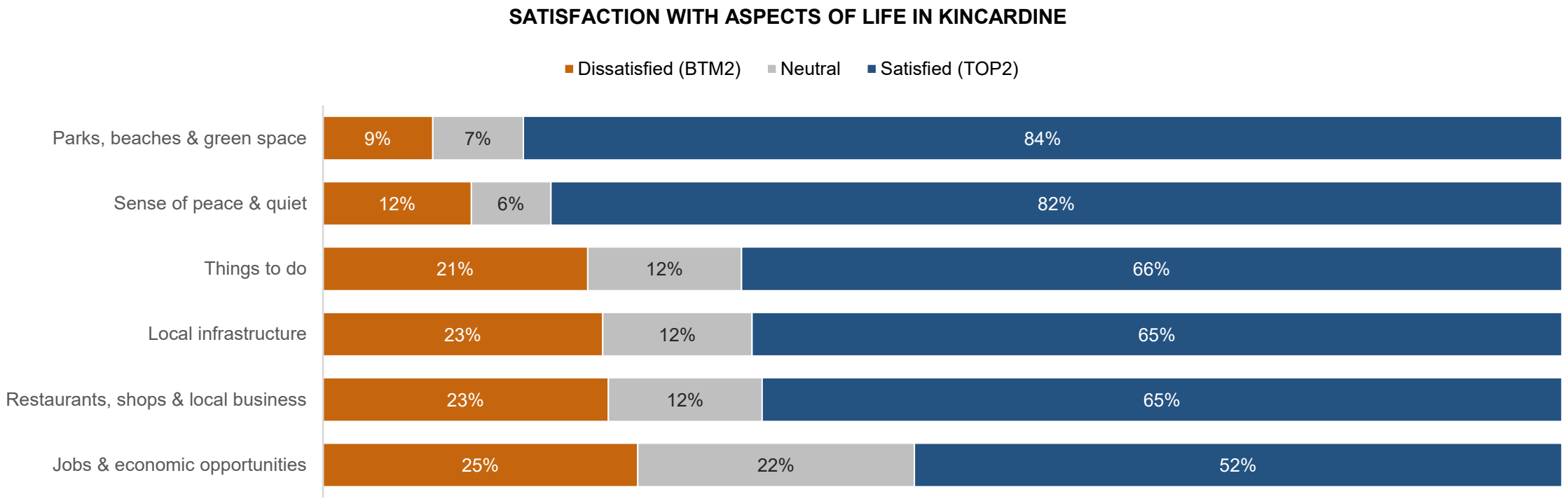
Base: all residents, excluding don't know (n=709). Q8 Overall, how would you rate your quality of life in the Municipality of Kincardine?

SATISFACTION WITH LIFE IN KINCARDINE

All residents | Segments are defined on slide 6

Residents are most satisfied with Kincardine's natural setting and its sense of peace and quiet.

More than eight in ten are satisfied with access to parks, beaches and green space (84%) and the sense of peace and quiet (82%). Around two-thirds are satisfied with things to do (66%), local infrastructure (65%) and access to restaurants and shops (65%), and half (52%) with jobs and economic opportunities, the area with the most room to grow.



Base: all residents, excluding don't know (n=592–712). Q9 Thinking about life in the Municipality of Kincardine, how satisfied are you with each of the following?

SATISFACTION WITH LIFE – BY SEGMENT

All residents | Segments are defined on slide 6

Seasonal residents are more satisfied on almost every measure, and younger residents are more satisfied with local infrastructure.

Seasonal residents are more satisfied than year-round residents with things to do (89% vs. 63%), local infrastructure (87% vs. 61%) and access to restaurants and shops (85% vs. 62%).

Residents aged 16–34 are more satisfied with local infrastructure (76%), while satisfaction among those aged 35–54 is somewhat lower for parks and beaches (78%) and infrastructure (57%).

Satisfaction with jobs and economic opportunities is lower among residents aged 55+ (44%). Views in the town and the rest of the municipality are closely aligned.

		AGE			RESIDENT TYPE		COMMUNITY	
Satisfied (TOP2)	Overall	16–34 (n=160)	35–54 (n=202)	55+ (n=351)	Year-round (n=592)	Seasonal (n=102)	Town (n=581)	Rest of munic. (n=132)
Parks, beaches & green space	84%	93% ▲	78% ▼	83%	82% ▼	92% ▲	84%	84%
Sense of peace & quiet	82%	81%	79%	83%	80% ▼	91% ▲	82%	79%
Things to do	66%	60%	61%	72% ▲	63% ▼	89% ▲	66%	68%
Local infrastructure	65%	76% ▲	57% ▼	66%	61% ▼	87% ▲	65%	66%
Restaurants, shops & local business	65%	69%	60%	66%	62% ▼	85% ▲	65%	64%
Jobs & economic opportunities	52%	59%	59%	44% ▼	54%	47%	53%	50%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=592–712). Q9 Thinking about life in the Municipality of Kincardine, how satisfied are you with each of the following? TOP2 = somewhat or very satisfied.

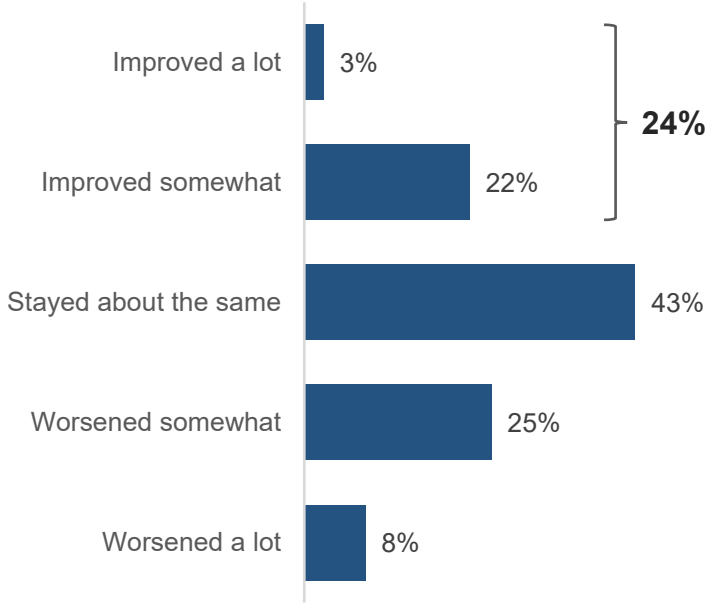
CHANGE IN QUALITY OF LIFE

Residents of four or more years | Segments are defined on slide 6

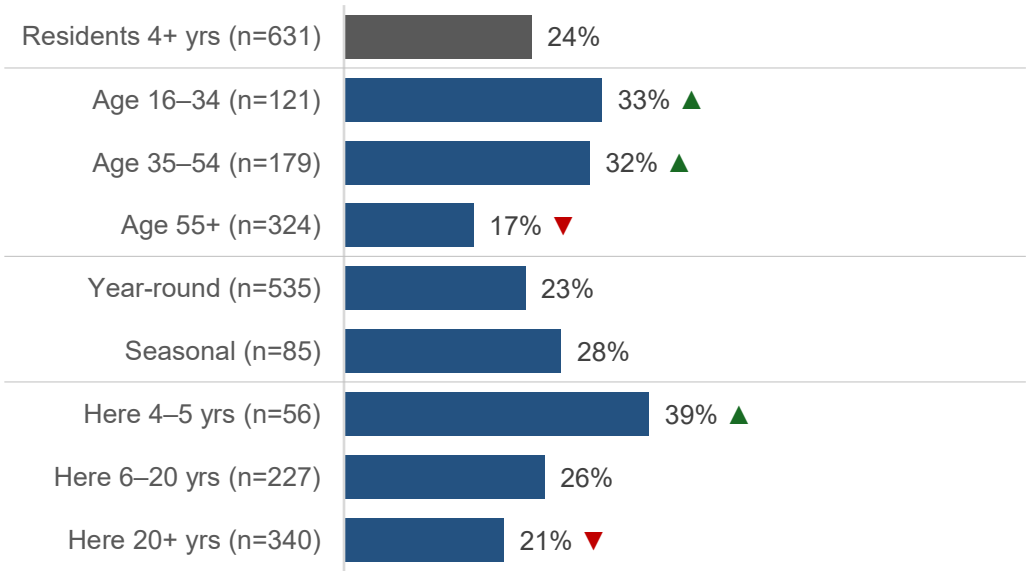
Two-thirds of longer-term residents feel quality of life has held steady or improved over the past three years.

Among residents of four or more years, 43% say quality of life has stayed about the same and 24% say it has improved, while 33% say it has worsened. Improvement is most often reported by residents of four to five years (39%) and those aged 16–34 (33%) and 35–54 (32%), compared with 17% of residents aged 55+ and 21% of residents of 20+ years.

RESIDENTS OF 4+ YEARS



IMPROVED (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: residents of four or more years, excluding don't know (n=631). Q10 Compared to three years ago, how would you say the quality of life in the Municipality of Kincardine has changed?

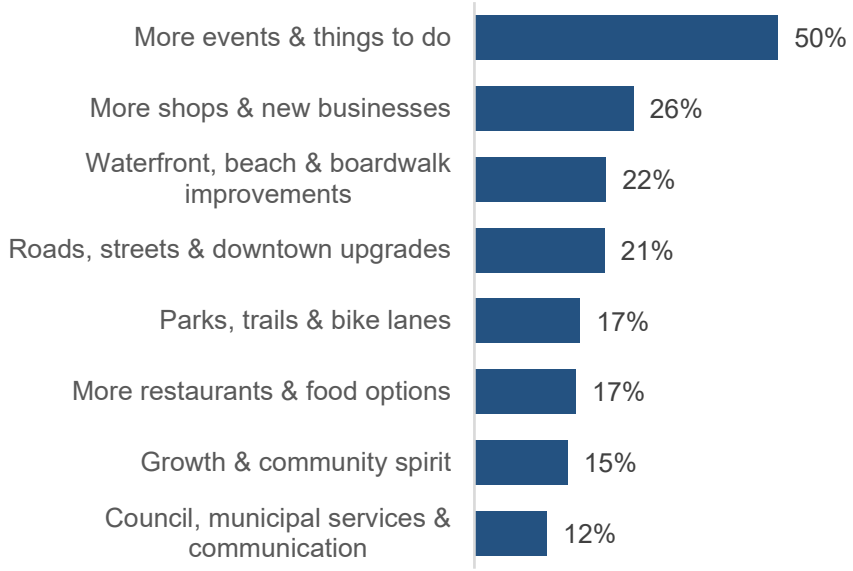
WHY QUALITY OF LIFE HAS CHANGED

Residents of four or more years who say quality of life has improved or worsened

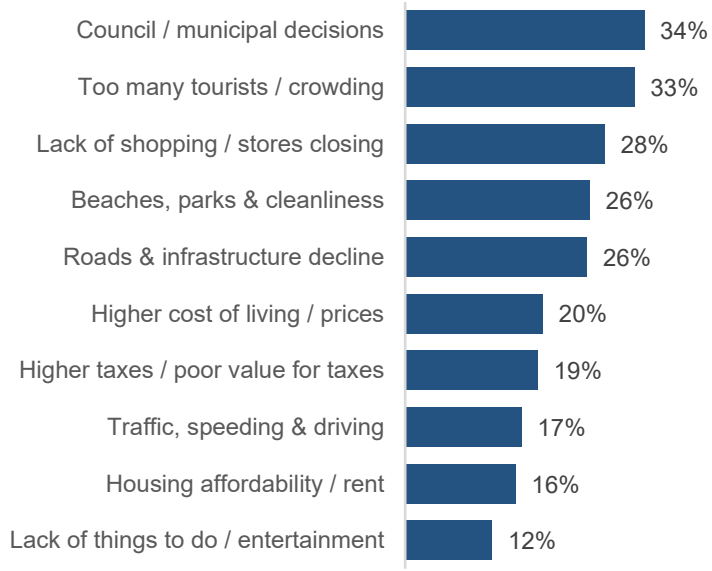
More events and amenities drive perceptions of improvement, while municipal decisions, crowding and local shopping are the main themes among those who see change for the worse.

Half (50%) of those who see improvement point to more events, festivals and things to do. Among those who feel quality of life has worsened, the most common themes are council and municipal decisions (34%), crowding (33%), local shopping options (28%), and beaches, parks and cleanliness (26%).

WAYS QUALITY OF LIFE HAS IMPROVED



WAYS QUALITY OF LIFE HAS WORSENED



Base: residents of 4+ years who say quality of life improved (n=124) / worsened (n=185). Q10A In what ways has the quality of life improved? Q10B In what ways has the quality of life worsened? Coded open-ended responses; multiple mentions allowed. Top codes shown.



TOURISM SENTIMENT & ECONOMIC VALUE

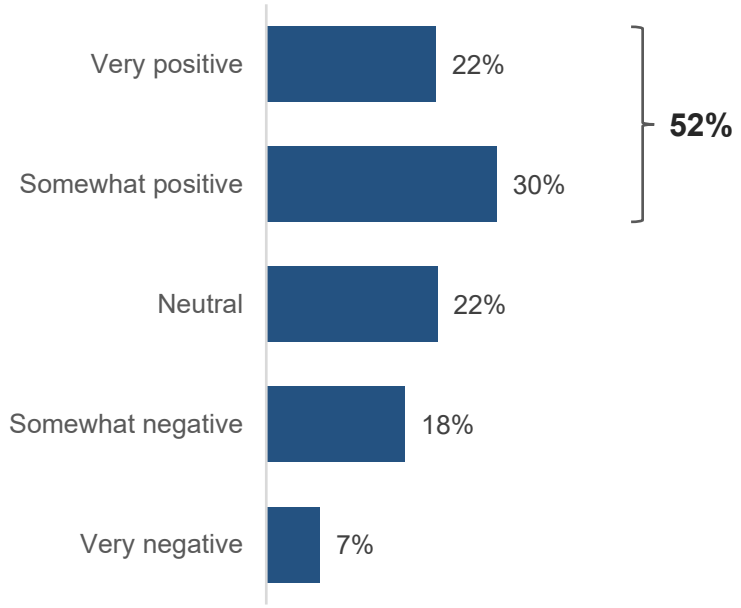
OVERALL FEELINGS ABOUT TOURISM

All residents | Segments are defined on slide 6

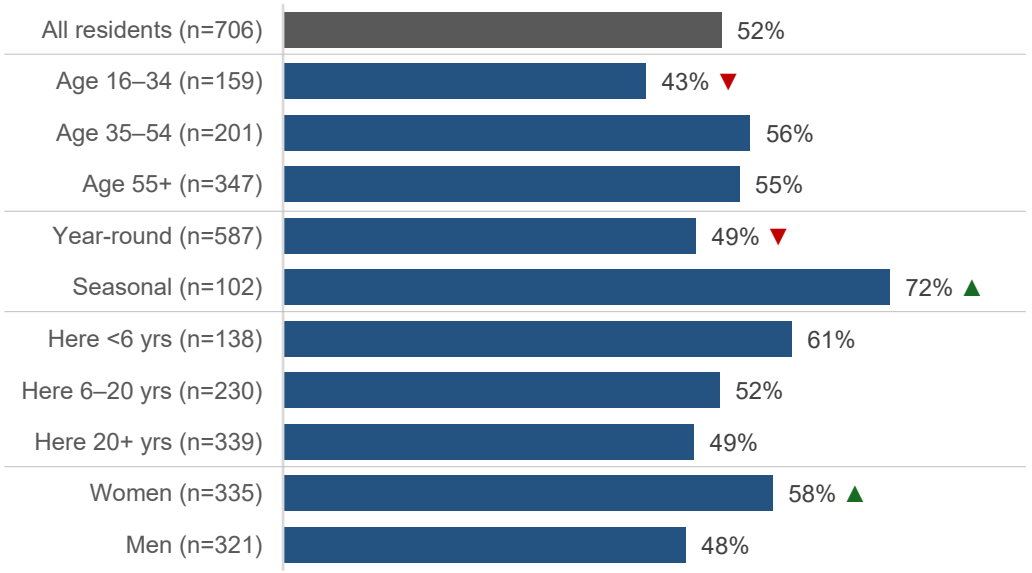
Residents lean positive on tourism, with half feeling positive about it.

Just over half (52%) feel positive about tourism in Kincardine, including 22% who feel very positive, while 22% are neutral and 25% feel negative. Seasonal residents are the most positive (72% vs. 49% of year-round residents), as are women (58% vs. 48% of men), while residents aged 16–34 are more measured (43%).

ALL RESIDENTS



POSITIVE (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=706). Q12 Overall, how do you feel about tourism in the Municipality of Kincardine?

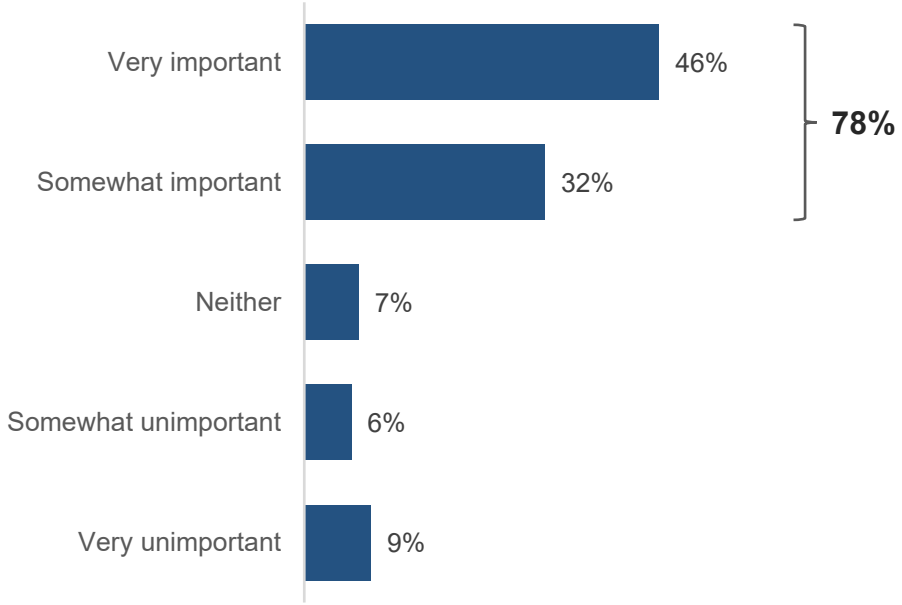
IMPORTANCE OF TOURISM TO THE LOCAL ECONOMY

All residents | Segments are defined on slide 6

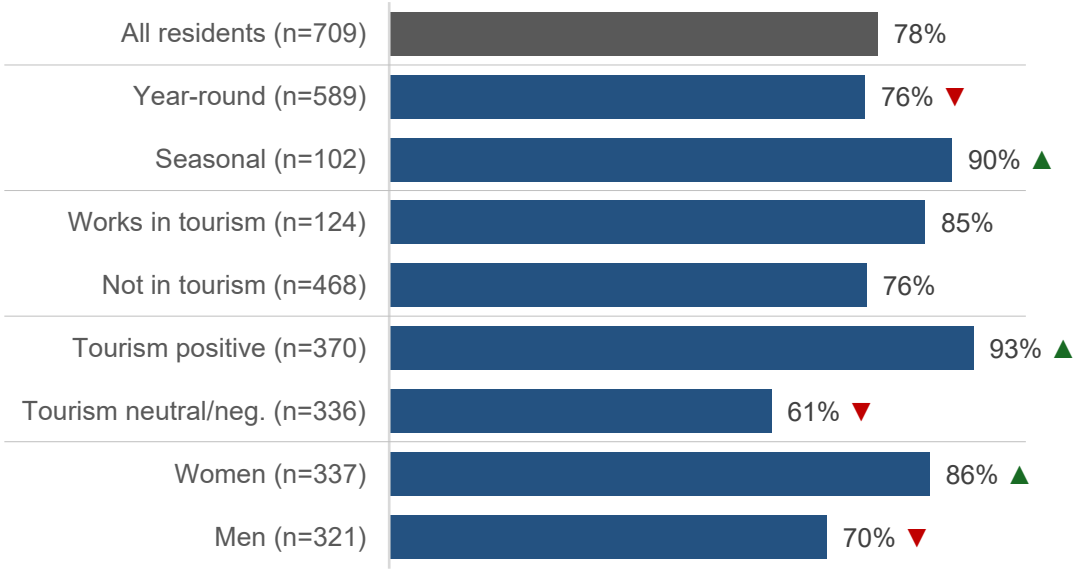
Tourism's economic role is widely recognized, including among residents who are less positive about tourism overall.

More than three-quarters (78%) say tourism is important to the local economy, including 46% who say very important. Recognition reaches 93% among residents who feel positive about tourism and 61% among those who are neutral or negative, suggesting views on tourism relate more to how it is managed than to whether it matters.

ALL RESIDENTS



IMPORTANT (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

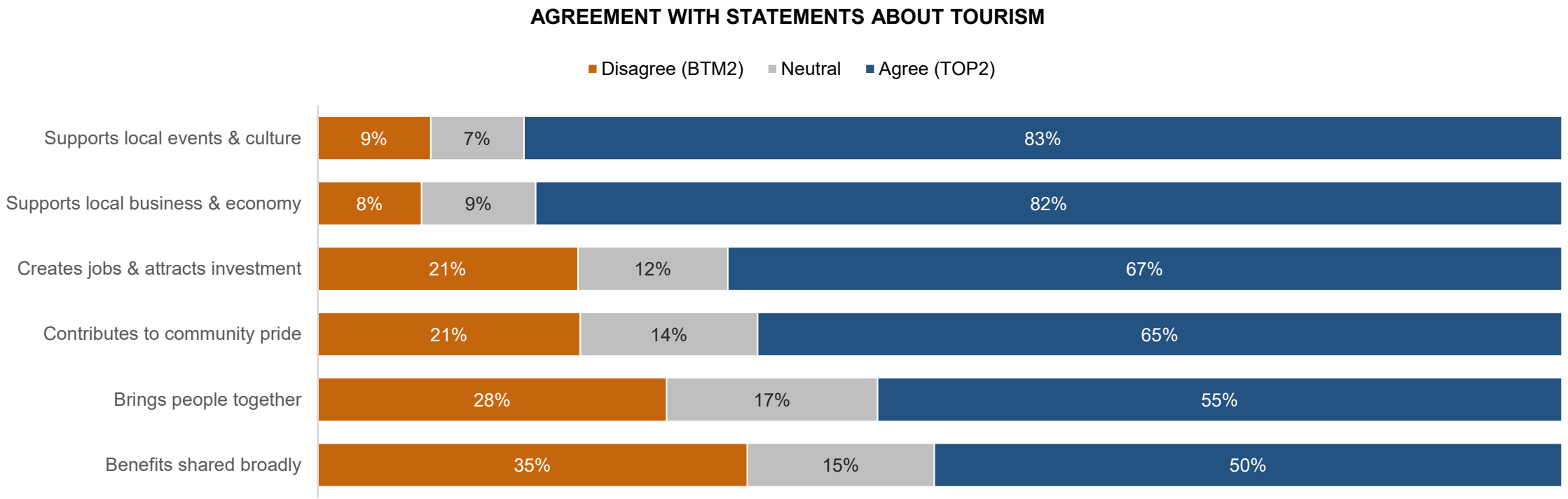
Base: all residents, excluding don't know (n=709). Q13 How important do you believe tourism is to the Municipality of Kincardine's local economy?

PERCEIVED BENEFITS OF TOURISM

All residents | Segments are defined on slide 6

Residents see tourism's benefits most clearly for local events and local business.

More than eight in ten agree tourism supports local events and cultural activities (83%) and local businesses (82%). Around two-thirds agree it creates jobs (67%) and contributes to community pride (65%), and around half agree it brings people together (55%) and that its benefits are shared broadly (50%).



Base: all residents, excluding don't know (n=655–707). Q14 To what extent do you agree or disagree with the following statements about tourism in the Municipality of Kincardine?

PERCEIVED BENEFITS OF TOURISM – BY SEGMENT

All residents | Segments are defined on slide 6

Views on tourism's community benefits vary with overall sentiment, while its economic role is broadly accepted.

Residents who feel positive about tourism agree with every statement at high levels (73%–98%). Among neutral or negative residents, around one in four agree that benefits are shared broadly (26%) and that tourism brings people together (26%).

Residents who work in tourism are more likely to agree tourism supports local events (93%) and local businesses (90%).

Views are consistent across age groups.

		TOURISM SECTOR (Q6)		TOURISM SENTIMENT (Q12)		AGE		
Agree (TOP2)	Overall	Works in tourism (n=124)	Not in tourism (n=467)	Positive (n=369)	Neutral/ negative (n=334)	16–34 (n=160)	35–54 (n=202)	55+ (n=346)
Supports local events & culture	83%	93% ▲	81%	98% ▲	67% ▼	86%	81%	83%
Supports local business & economy	82%	90% ▲	80%	97% ▲	67% ▼	85%	82%	81%
Creates jobs & attracts investment	67%	72%	66%	88% ▲	44% ▼	66%	70%	66%
Contributes to community pride	65%	71%	64%	91% ▲	36% ▼	58%	65%	68%
Brings people together	55%	60%	54%	81% ▲	26% ▼	50%	56%	57%
Benefits shared broadly	50%	55%	50%	73% ▲	26% ▼	54%	49%	50%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=655–707). Q14 To what extent do you agree or disagree with the following statements about tourism in the Municipality of Kincardine? TOP2 = somewhat or strongly agree.



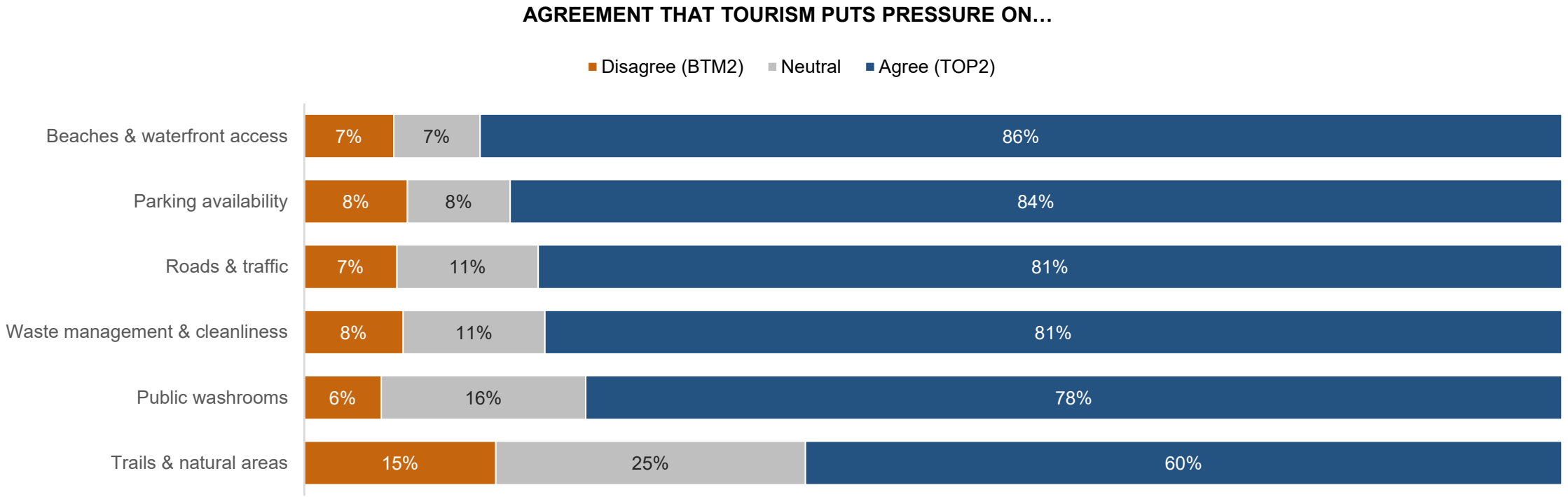
INFRASTRUCTURE & ENVIRONMENT

PRESSURE FROM TOURISM ON INFRASTRUCTURE AND NATURAL AREAS

All residents | Segments are defined on slide 6

Residents identify the waterfront, parking, roads and waste management as where tourism's demands are felt most.

More than eight in ten agree tourism puts pressure on beaches and waterfront access (86%), parking (84%), roads and traffic (81%) and waste management and cleanliness (81%), and 78% say the same of public washrooms. Fewer see pressure on trails and natural areas (60%).



Base: all residents, excluding don't know (n=662–702). Q16 To what extent do you agree or disagree that tourism in the Municipality of Kincardine puts pressure on each of the following?

PRESSURE FROM TOURISM – BY SEGMENT

All residents | Segments are defined on slide 6

Views are consistent across the municipality, with year-round and longer-term residents most attuned to peak-season demands.

Year-round residents are more likely than seasonal residents to see pressure on beaches (89% vs. 76%), parking (87% vs. 69%), roads (85% vs. 70%) and waste management (84% vs. 69%).

Residents of 20+ years are more likely to see pressure on beaches (89%) and parking (87%), while newer residents see less pressure on beaches (77%) and roads (74%).

Views in the town and the rest of the municipality are closely aligned.

		COMMUNITY		RESIDENT TYPE		YEARS IN KINCARDINE		
Agree (TOP2)	Overall	Town (n=570)	Rest of munic. (n=131)	Year-round (n=581)	Seasonal (n=101)	Under 6 yrs (n=132)	6–20 yrs (n=230)	20+ yrs (n=339)
Beaches & waterfront access	86%	86%	87%	89% ▲	76% ▼	77% ▼	86%	89% ▲
Parking availability	84%	83%	86%	87% ▲	69% ▼	82%	79% ▼	87% ▲
Roads & traffic	81%	82%	80%	85% ▲	70% ▼	74% ▼	82%	84%
Waste management & cleanliness	81%	80%	83%	84% ▲	69% ▼	77%	83%	81%
Public washrooms	78%	78%	74%	79%	74%	68% ▼	82%	79%
Trails & natural areas	60%	59%	64%	62% ▲	53%	61%	63%	58%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=662–702). Q16 To what extent do you agree or disagree that tourism in the Municipality of Kincardine puts pressure on each of the following? TOP2 = somewhat or strongly agree.

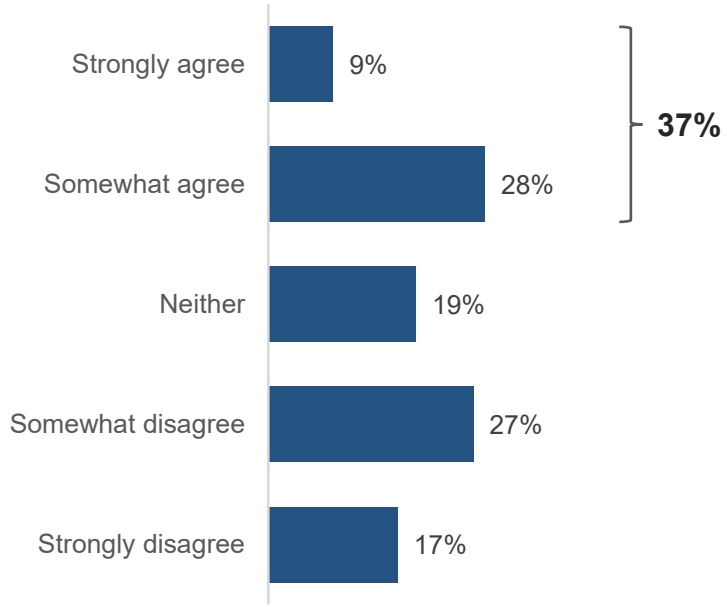
INFRASTRUCTURE KEEPING PACE WITH THE PEAK SEASON

All residents | Segments are defined on slide 6

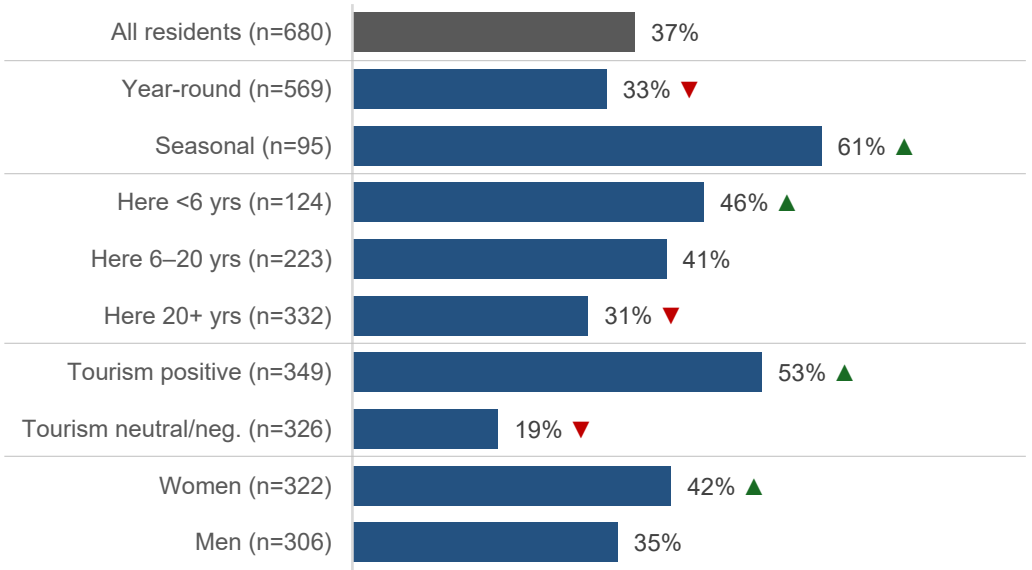
Over one-third of residents agree infrastructure keeps pace with peak-season demand, highlighting a clear area for investment.

Thirty-seven percent agree the Municipality's public infrastructure keeps pace with the peak visitor season, 19% are neutral and 44% disagree. Agreement is highest among seasonal residents (61%), residents who feel positive about tourism (53%) and residents of fewer than six years (46%), compared with 33% of year-round residents and 31% of residents of 20+ years.

ALL RESIDENTS

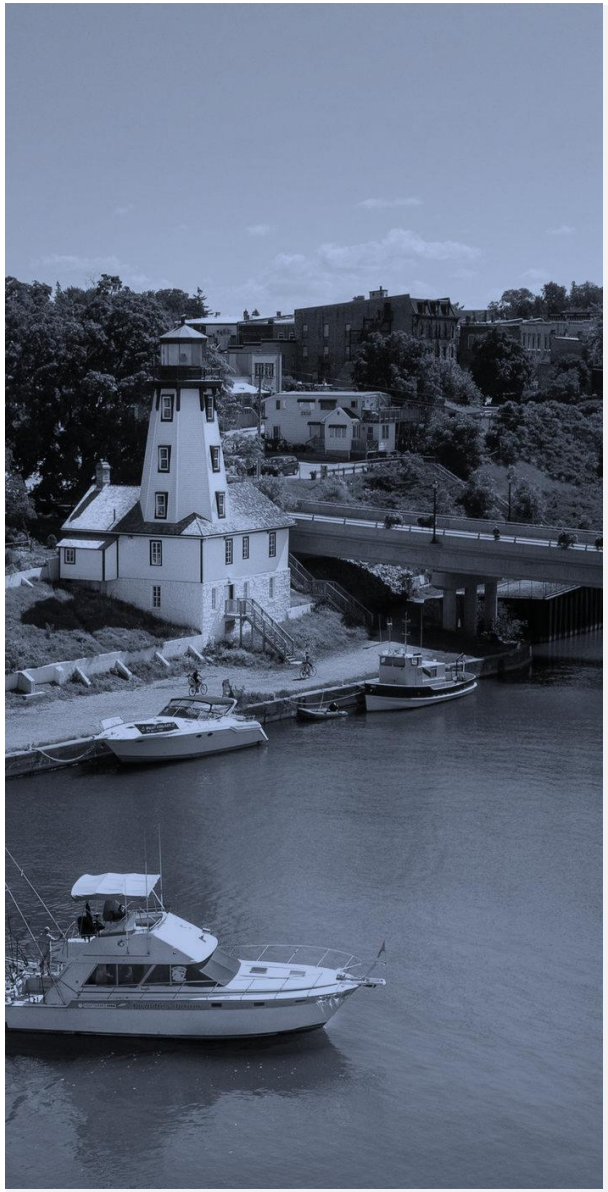


AGREE (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=680). Q17 How much do you agree or disagree with the following statement? "The Municipality's public infrastructure keeps pace with the demands of the peak visitor season."



APPETITE FOR GROWTH

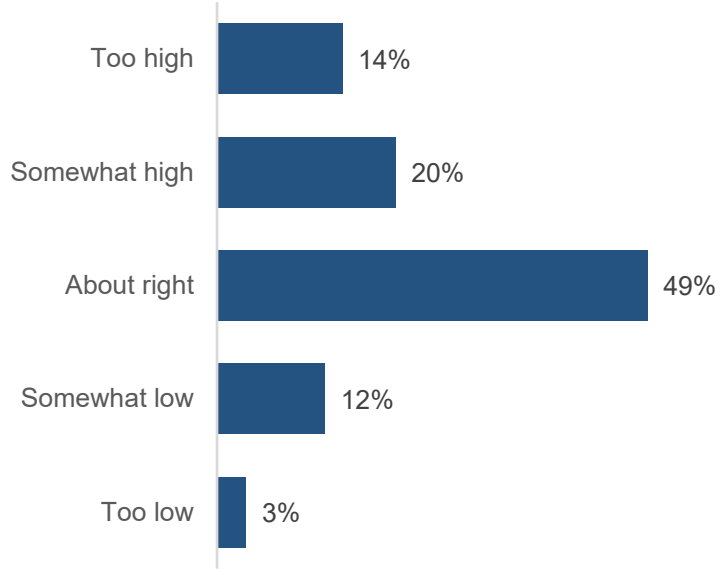
CURRENT LEVEL OF TOURISM

All residents | Segments are defined on slide 6

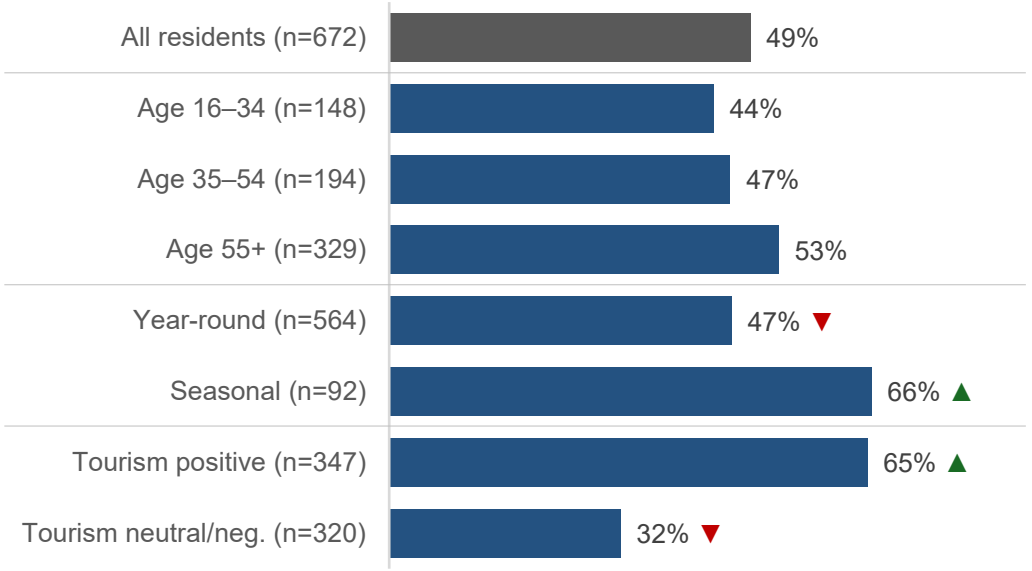
Half of residents feel the current level of tourism is about right.

Forty-nine percent say the level of tourism is about right, while 35% say it is too high and 16% say it is too low. Seasonal residents (66%) and residents who feel positive about tourism (65%) are the most likely to say it is about right, and residents aged 55+ (53%) are above the overall level.

ALL RESIDENTS



ABOUT RIGHT BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

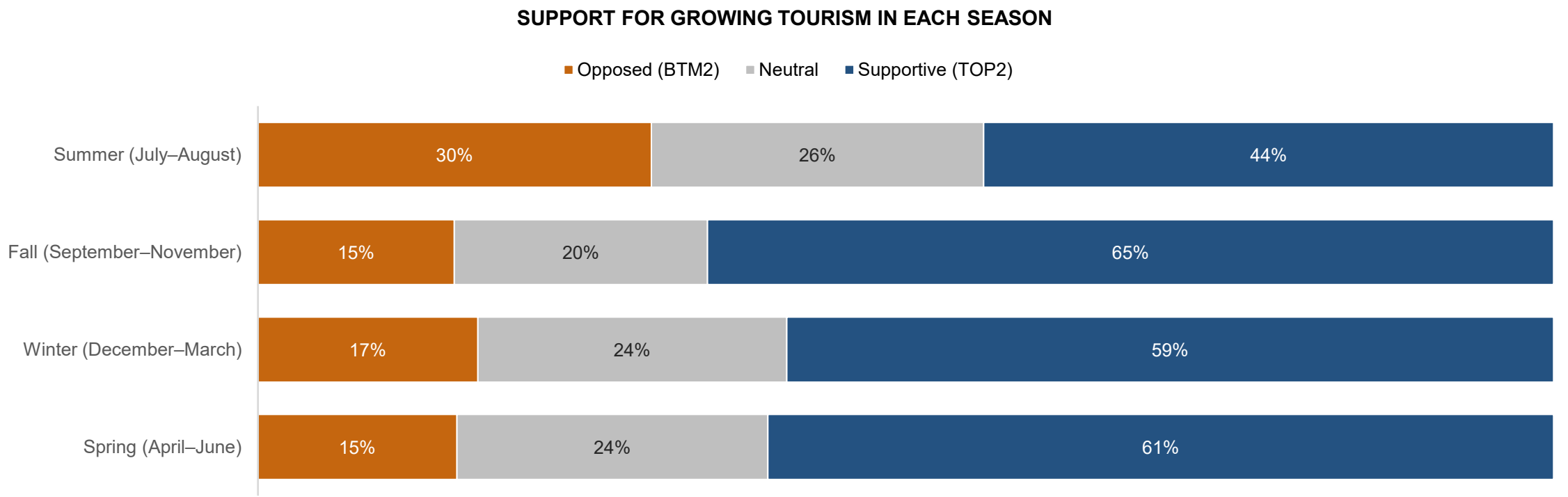
Base: all residents, excluding don't know (n=672). Q19 In your opinion, is the current level of tourism in the Municipality of Kincardine…?

SUPPORT FOR TOURISM GROWTH BY SEASON

All residents | Segments are defined on slide 6

Support for growth is strongest in the shoulder seasons.

Around six in ten support growing tourism in the fall (65%), spring (61%) and winter (59%), and 44% support growth in summer. This pattern supports a four-season approach that adds visitation when the community has the most capacity.



Base: all residents, excluding don't know (n=699–709). Q20 How supportive are you of growing tourism in Kincardine during each of the following seasons?

SUPPORT FOR GROWTH BY SEASON – BY SEGMENT

All residents | Segments are defined on slide 6

Seasonal and tourism-positive residents are the strongest supporters of growth in every season.

Seasonal residents are more supportive than year-round residents of summer growth (55% vs. 42%) and fall growth (78% vs. 64%).

Around four in ten residents who are neutral or negative toward tourism support growth in the fall (43%) and winter (41%), compared with 23% for summer.

Support for spring growth is somewhat lower among residents aged 16–34 (50%).

		AGE			RESIDENT TYPE		TOURISM SENTIMENT (Q12)	
Supportive (TOP2)	Overall	16–34 (n=160)	35–54 (n=201)	55+ (n=348)	Year-round (n=589)	Seasonal (n=101)	Positive (n=367)	Neutral/ negative (n=335)
Summer (July–August)	44%	38%	47%	45%	42%	55% ▲	64% ▲	23% ▼
Fall (September–November)	65%	63%	71%	63%	64%	78% ▲	86% ▲	43% ▼
Winter (December–March)	59%	55%	63%	59%	59%	66%	76% ▲	41% ▼
Spring (April–June)	61%	50% ▼	65%	63%	59%	75% ▲	82% ▲	38% ▼

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=699–709). Q20 How supportive are you of growing tourism in Kincardine during each of the following seasons? TOP2 = somewhat or very supportive.

PREFERRED TYPES OF SUMMER TOURISM GROWTH

Residents who support summer growth | Segments are defined on slide 6

Among residents who support summer growth, festivals and family-friendly attractions are the preferred direction.

Festivals and cultural events (71%) and family-friendly activities (70%) lead, followed by outdoor and nature-based experiences (61%) and beach and waterfront programming (58%).

Scottish cultural traditions (45%) and sports tournaments (42%) are each supported by more than four in ten.

Residents of fewer than six years are more likely to favour outdoor and nature-based experiences (73%).

		AGE			YEARS IN KINCARDINE		
Type of tourism	Overall (n=332)	16–34 (n=61)	35–54 (n=94)	55+ (n=157)	Under 6 yrs (n=66)	6–20 yrs (n=104)	20+ yrs (n=142)
Festivals & cultural events	71%	72%	73%	70%	78%	69%	70%
Family-friendly activities	70%	75%	71%	67%	71%	65%	72%
Outdoor & nature-based experiences	61%	61%	57%	63%	73% ▲	55%	59%
Beach & waterfront programming	58%	64%	60%	55%	67%	56%	56%
Arts & cultural heritage	55%	43%	56%	59%	63%	46% ▼	58%
Agricultural & culinary tourism	55%	58%	54%	53%	63%	46%	57%
Scottish cultural traditions	45%	41%	46%	47%	52%	38%	48%
Sports tournaments & events	42%	29%	41%	47%	41%	43%	41%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: residents who support growing tourism in summer (n=332). Q21A What types of tourism would you most like to see grow in the Municipality of Kincardine during the peak summer season (July–August)? Multiple responses allowed; Other (15%) and Not sure (3%) not shown.

PREFERRED TYPES OF OFF-SEASON TOURISM GROWTH

Residents who support growth in at least one off-season | Segments are defined on slide 6

Family-friendly, holiday and winter recreation offerings lead residents' preferences for off-season growth.

Family-friendly activities (64%), holiday-themed programming (61%) and winter recreation (59%) lead, followed by festivals (57%) and outdoor experiences (56%).

Residents aged 16–34 are more likely to favour holiday programming (75%) and winter recreation (69%), and those aged 35–54 to favour wellness and spa experiences (57%).

Residents of fewer than six years show broader interest, including outdoor experiences (76%) and surfing (39%).

		AGE			YEARS IN KINCARDINE			GENDER	
Type of tourism	Overall (n=533)	16–34 (n=112)	35–54 (n=151)	55+ (n=254)	Under 6 yrs (n=104)	6–20 yrs (n=172)	20+ yrs (n=242)	Women (n=267)	Men (n=219)
Family-friendly activities	64%	71%	70%	57% ▼	60%	62%	67%	66%	60%
Holiday-themed programming	61%	75% ▲	60%	55% ▼	71% ▲	63%	55% ▼	68% ▲	56%
Winter recreation	59%	69% ▲	65%	52% ▼	71% ▲	58%	56%	64% ▲	55%
Festivals & cultural events	57%	61%	60%	53%	68% ▲	55%	53%	59%	57%
Outdoor & nature-based experiences	56%	65%	57%	52%	76% ▲	53%	50% ▼	59%	55%
Arts & cultural heritage	50%	41%	49%	54%	60% ▲	47%	47%	50%	48%
Wellness, retreat & spa	46%	52%	57% ▲	37% ▼	58% ▲	51%	37% ▼	54% ▲	39% ▼
Agricultural & culinary tourism	44%	47%	44%	43%	59% ▲	43%	39%	48%	42%
Sports tournaments & events	39%	36%	41%	39%	39%	38%	40%	37%	44%
Scottish cultural traditions	32%	38%	31%	30%	45% ▲	33%	26% ▼	31%	35%
Surfing	24%	30%	26%	19% ▼	39% ▲	20%	20%	24%	24%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: residents who support growing tourism in the fall, winter or spring (n=533). Q21B What types of tourism would you most like to see grow in the Municipality of Kincardine during the spring, fall and winter seasons (September–June)? Multiple responses allowed; Other (10%) and Not sure (4%) not shown.

TOURISM MANAGEMENT PRIORITIES

All residents | Segments are defined on slide 6

Parking, cleanliness and washrooms are residents' top priorities for managing tourism.

Parking and traffic management (59%), waste management and cleanliness (58%) and public washrooms (55%) are each selected by more than half of residents, well ahead of roads (43%), environmental protection (42%) and managing peak-season crowds (42%).

Year-round residents place more weight on parking (63% vs. 35% of seasonal residents) and roads (47% vs. 15%), while seasonal residents more often prioritize trails, parks and public spaces (53%).

Waste management is a higher priority for residents aged 55+ (63%) and those of 20+ years (65%).

		AGE			RESIDENT TYPE		YEARS IN KINCARDINE		
Priority area	Overall (n=713)	16–34 (n=160)	35–54 (n=202)	55+ (n=351)	Year-round (n=592)	Seasonal (n=103)	Under 6 yrs (n=138)	6–20 yrs (n=233)	20+ yrs (n=343)
Parking & traffic management	59%	64%	57%	57%	63% ▲	35% ▼	63%	55%	59%
Waste management & cleanliness	58%	47% ▼	57%	63% ▲	60% ▲	45% ▼	50%	51% ▼	65% ▲
Public washrooms	55%	43% ▼	58%	59%	56%	49%	48%	51%	60% ▲
Roads & transportation	43%	46%	49%	37% ▼	47% ▲	15% ▼	41%	40%	45%
Environmental protection	42%	34%	43%	44%	42%	41%	42%	39%	43%
Managing peak-season crowds	42%	42%	44%	40%	43%	33%	40%	47%	39%
Trails, parks & public spaces	40%	32% ▼	40%	43%	38% ▼	53% ▲	52% ▲	34% ▼	39%
Community events & programming	34%	35%	38%	31%	34%	35%	42%	36%	29% ▼
Visitor information	29%	25%	22% ▼	34% ▲	28%	34%	30%	24%	31%
Housing for tourism/seasonal workers	26%	29%	33% ▲	21% ▼	27%	20%	35% ▲	27%	22% ▼
Wayfinding signage	13%	7% ▼	16%	14%	12%	18%	14%	15%	12%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents (n=713). Q22 What areas should be prioritized to better manage tourism in the Municipality of Kincardine? Multiple responses allowed; Other (12%) and Not sure (3%) not shown.

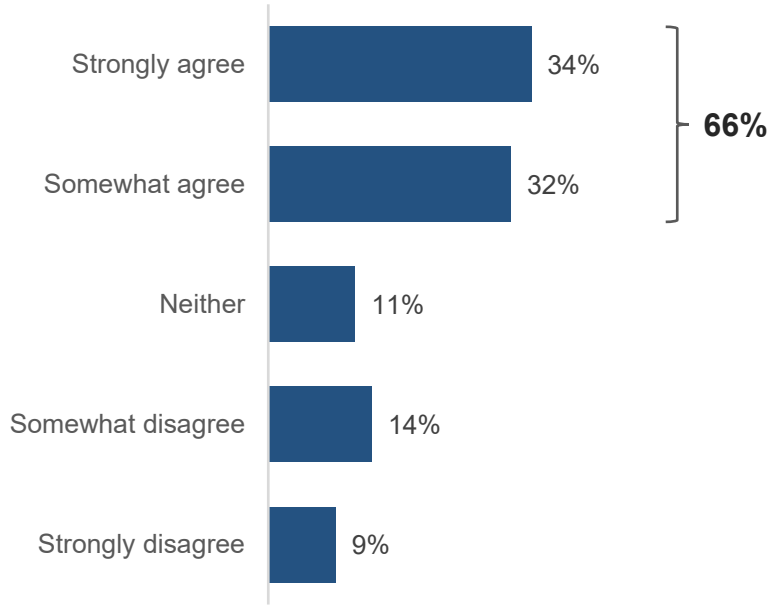
CAN TOURISM GROWTH AND QUALITY OF LIFE COEXIST?

All residents | Segments are defined on slide 6

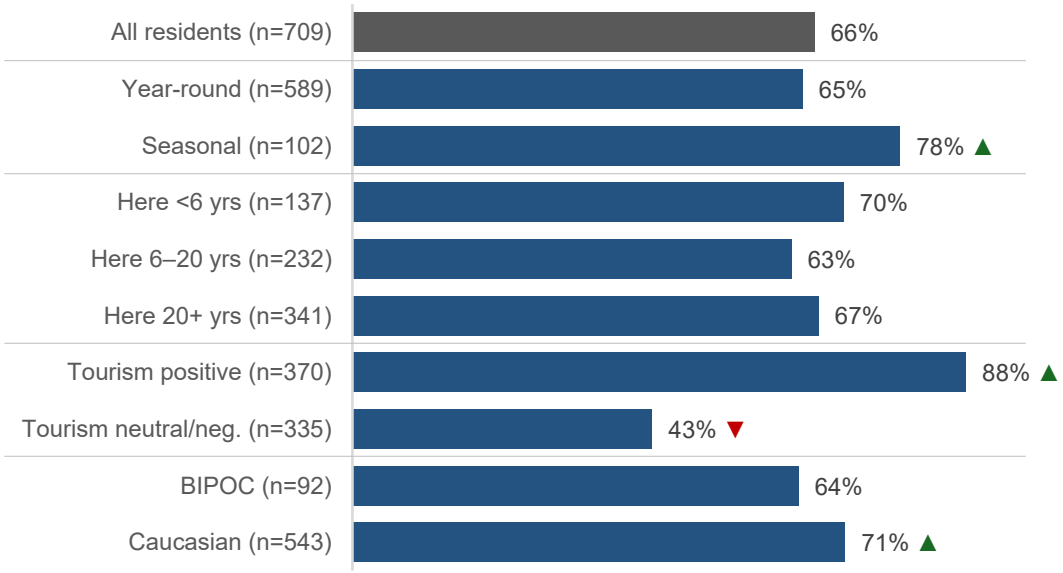
Two-thirds of residents believe tourism growth and a good quality of life can coexist.

Sixty-six percent agree growth and quality of life can coexist, including 34% who strongly agree, while 22% disagree. Agreement reaches 78% among seasonal residents, and 43% of residents who are neutral or negative toward tourism also agree, suggesting a well-managed growth path can retain broad community support.

ALL RESIDENTS

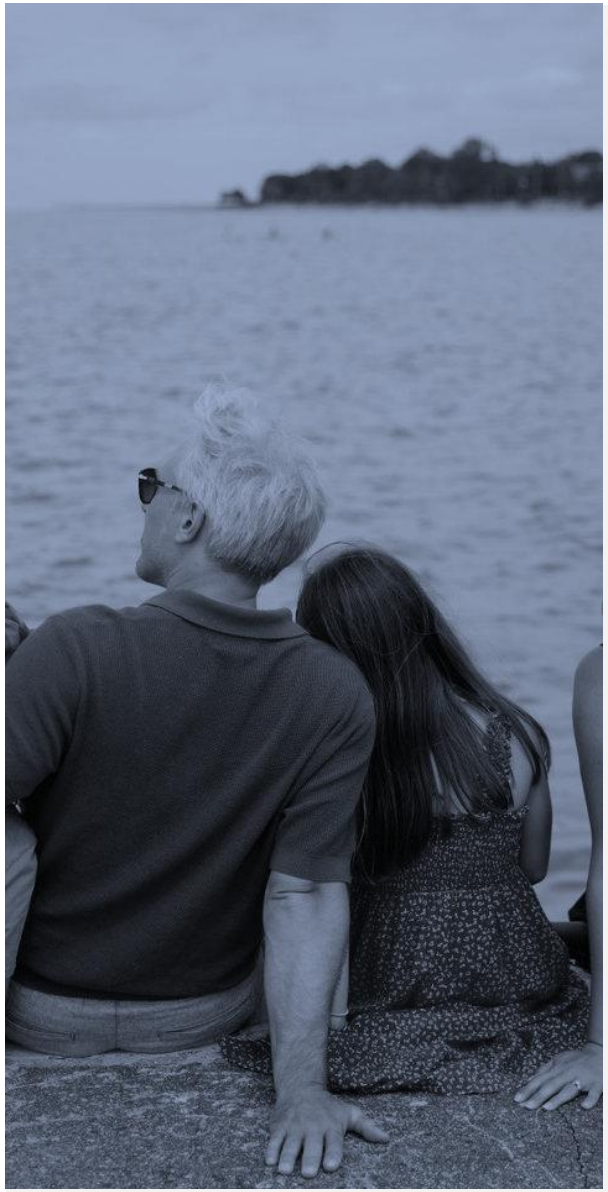


AGREE (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=709). Q23 How much do you agree or disagree with the following statement? "Tourism growth and a good quality of life for residents can coexist in the Municipality of Kincardine."



WELCOMING COMMUNITY

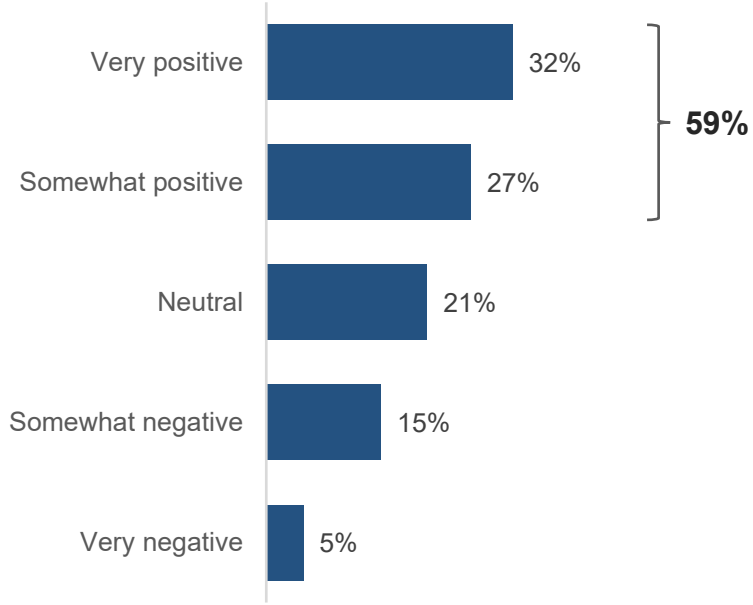
INTERACTIONS WITH VISITORS

Residents who interact with visitors | Segments are defined on slide 6

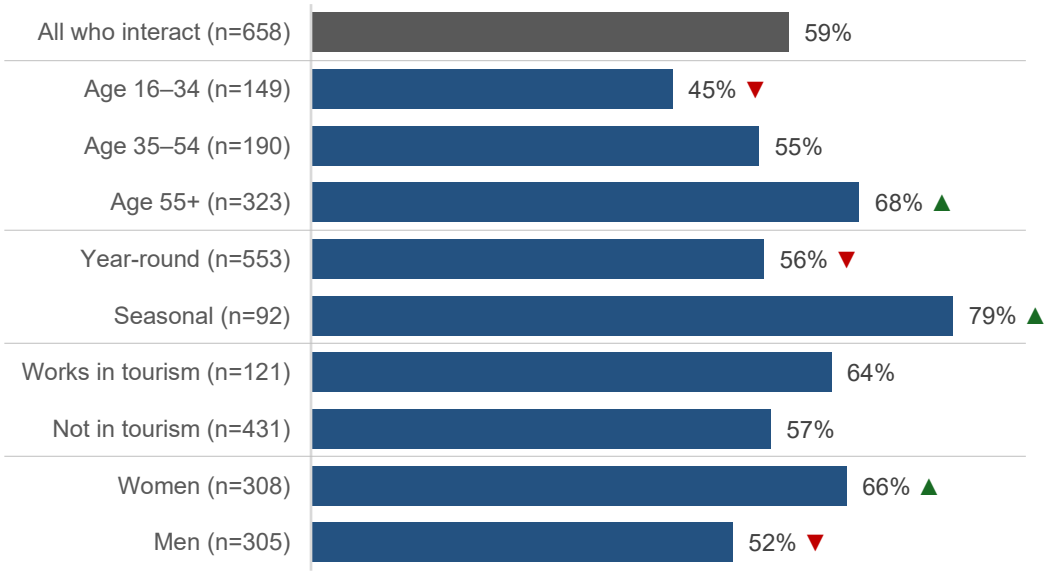
Most residents describe their interactions with visitors as positive.

Fifty-nine percent describe their interactions with visitors as positive, 21% as neutral and 20% as negative. Positive interactions rise to 68% among residents aged 55+ and 79% among seasonal residents, and are 45% among residents aged 16–34.

RESIDENTS WHO INTERACT WITH VISITORS



POSITIVE (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: residents who typically interact with visitors, excluding don't know (n=658). Q25 Thinking about your personal interactions with visitors to the Municipality of Kincardine, how would you describe those interactions overall?

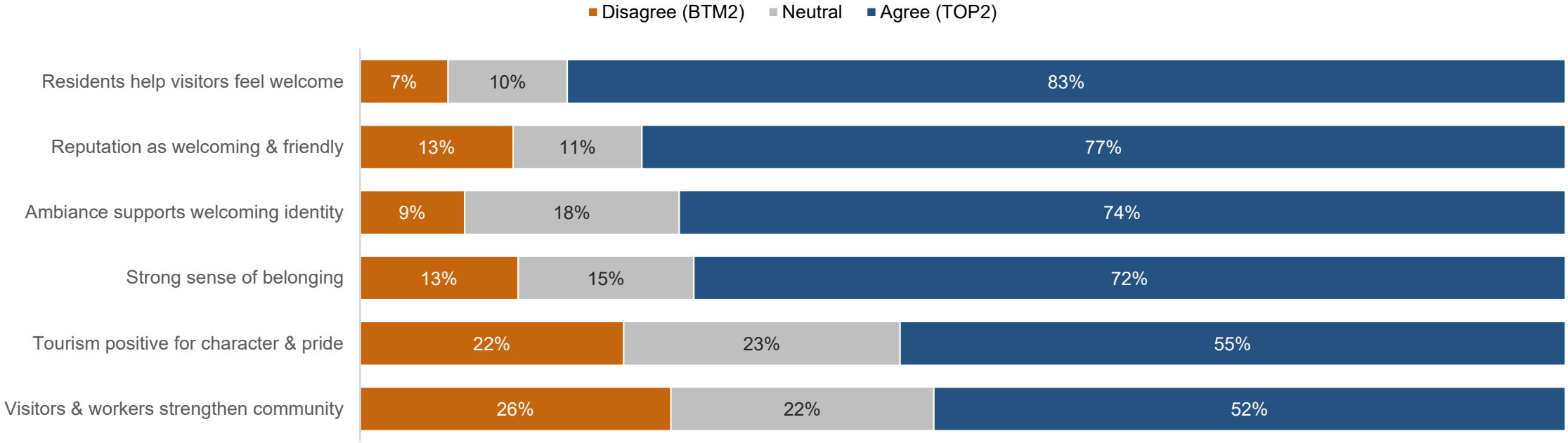
KINCARDINE AS A WELCOMING COMMUNITY

All residents | Segments are defined on slide 6

Kincardine's welcoming identity is strong, and more than half credit tourism with strengthening the community.

Eight in ten agree residents play an important role in welcoming visitors (83%) and that Kincardine has a reputation as a welcoming community (77%), and 72% feel a strong sense of belonging. More than half agree tourism has had a positive effect on community character (55%) and that visitors and temporary workers have strengthened the community (52%).

AGREEMENT WITH STATEMENTS ABOUT KINCARDINE AS A WELCOMING COMMUNITY



Base: all residents, excluding don't know (n=684–707). Q26 To what extent do you agree or disagree with the following statements about Kincardine as a welcoming community?

WELCOMING COMMUNITY – BY SEGMENT

All residents | Segments are defined on slide 6

Seasonal residents are the most positive about tourism's community effects, and newer residents are building their sense of belonging.

Most residents of fewer than six years feel a strong sense of belonging (63%), compared with 72% of residents overall.

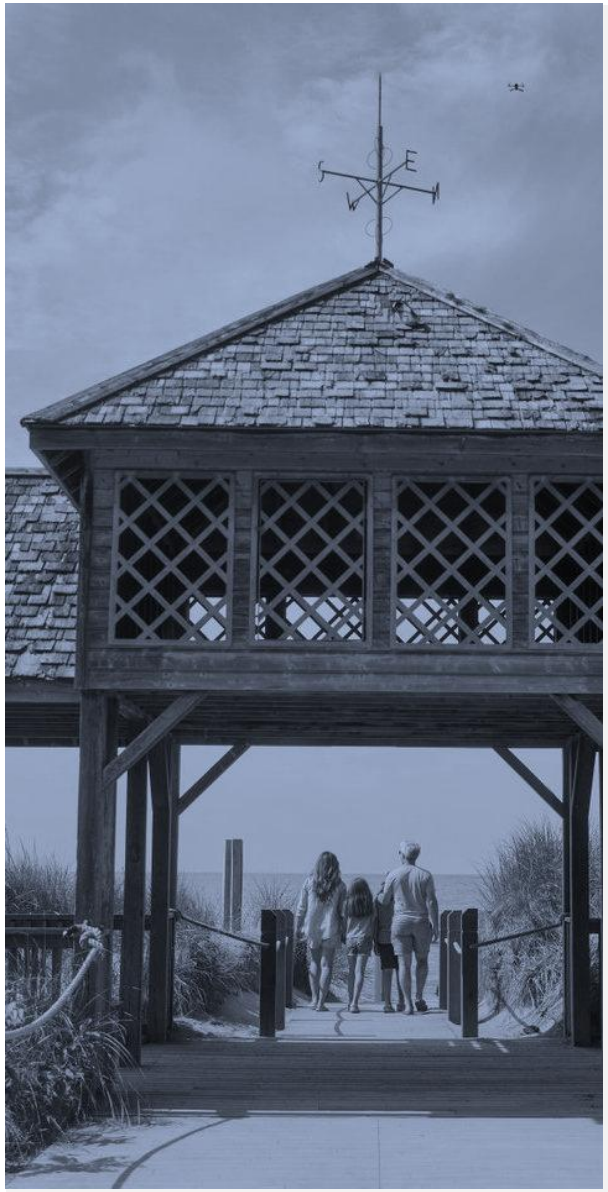
Seasonal residents are more likely than year-round residents to agree tourism has had a positive effect on community character (74% vs. 53%) and that visitors and temporary workers have strengthened the community (73% vs. 49%).

Belonging is similar among BIPOC and Caucasian residents (77% vs. 74%).

		YEARS IN KINCARDINE			RESIDENT TYPE		ETHNICITY	
Agree (TOP2)	Overall	Under 6 yrs (n=138)	6–20 yrs (n=226)	20+ yrs (n=340)	Year-round (n=587)	Seasonal (n=98)	BIPOC (n=87)	Caucasian (n=540)
Residents help visitors feel welcome	83%	86%	80%	83%	82%	93% ▲	76%	85% ▲
Reputation as welcoming & friendly	77%	71%	78%	78%	77%	83%	77%	79% ▲
Ambiance supports welcoming identity	74%	75%	75%	72%	73%	85% ▲	72%	78% ▲
Strong sense of belonging	72%	63% ▼	73%	76%	73%	80%	77%	74%
Tourism positive for character & pride	55%	59%	58%	52%	53% ▼	74% ▲	54%	60% ▲
Visitors & workers strengthen community	52%	57%	52%	51%	49% ▼	73% ▲	52%	56% ▲

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=684–707). Q26 To what extent do you agree or disagree with the following statements about Kincardine as a welcoming community? TOP2 = somewhat or strongly agree.



SEASONALITY

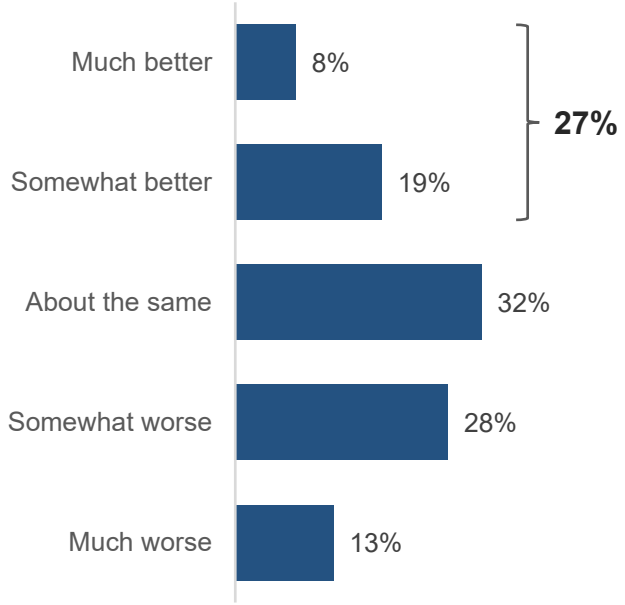
PEAK SEASON VS. THE REST OF THE YEAR

All residents | Segments are defined on slide 6

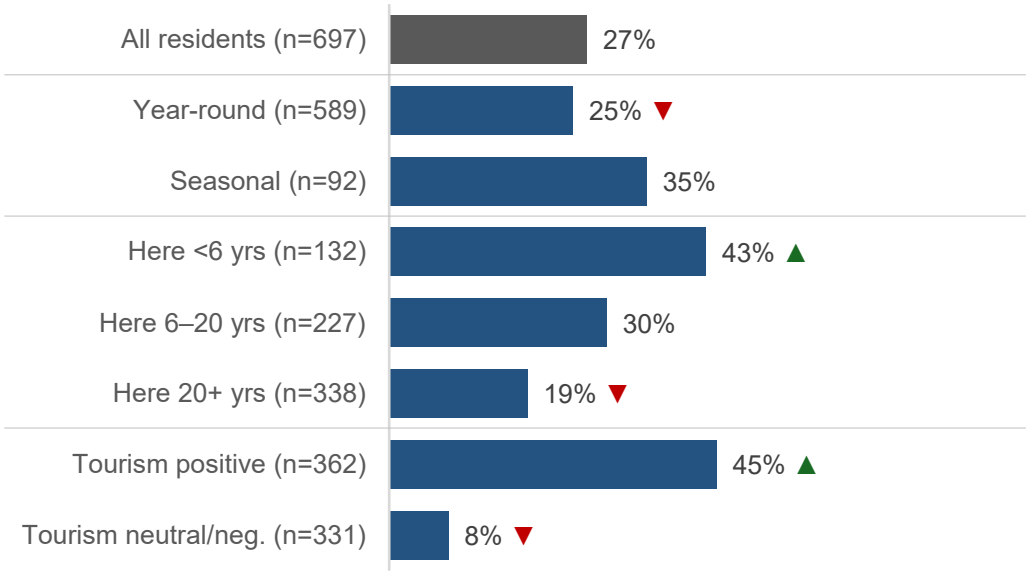
Six in ten residents describe life during the July–August peak as the same as or better than the rest of the year.

Fifty-nine percent say peak-season life is about the same (32%) or better (27%) than the rest of the year, while 41% say it is worse. Residents who feel positive about tourism (45%) and residents of fewer than six years (43%) are the most likely to say summer is better, compared with 25% of year-round residents and 19% of residents of 20+ years.

ALL RESIDENTS



BETTER (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

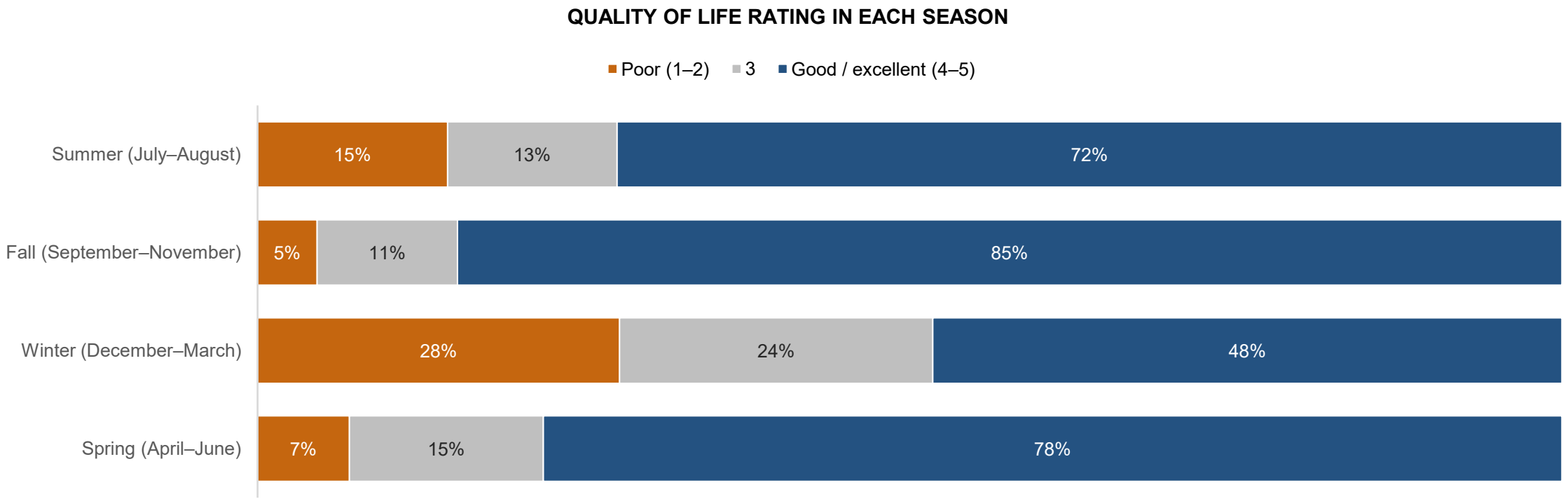
Base: all residents, excluding don't know (n=697). Q11 How would you describe your experience of living in the Municipality of Kincardine during the peak visitor season (July–August) compared to the rest of the year?

QUALITY OF LIFE BY SEASON

All residents | Segments are defined on slide 6

Fall is residents' highest-rated season, followed by spring and summer.

Quality of life is rated highest in the fall (85% good or excellent) and spring (78%), followed by summer (72%) and winter (48%). Winter offers the most room to grow, pointing to off-season programming as an opportunity to enhance life for residents as well as attract visitors.



Base: all residents, excluding don't know and not applicable (n=648–706). Q27 How would you rate your quality of life in the Municipality of Kincardine during each of the following seasons?

QUALITY OF LIFE BY SEASON – BY SEGMENT

All residents | Segments are defined on slide 6

Seasonal residents rate summer especially highly, and winter ratings vary most by age and community.

Seasonal residents rate summer higher than year-round residents (93% vs. 68%).

Ratings among residents aged 35–54 are somewhat lower in winter (35%) and spring (69%).

Residents in town rate winter slightly higher than those elsewhere in the municipality (49% vs. 43% good or excellent).

		RESIDENT TYPE		AGE			COMMUNITY	
Good / excellent (TOP2)	Overall	Year-round (n=585)	Seasonal (n=102)	16–34 (n=157)	35–54 (n=202)	55+ (n=347)	Town (n=574)	Rest of munic. (n=132)
Summer (July–August)	72%	68% ▼	93% ▲	71%	69%	75%	73%	72%
Fall (September–November)	85%	85%	82%	84%	81%	87%	85%	82%
Winter (December–March)	48%	48%	45%	52%	35% ▼	54% ▲	49%	43%
Spring (April–June)	78%	77%	84%	81%	69% ▼	82% ▲	78%	76%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know and not applicable (n=648–706). Q27 How would you rate your quality of life in the Municipality of Kincardine during each of the following seasons? TOP2 = 4 or 5 out of 5.

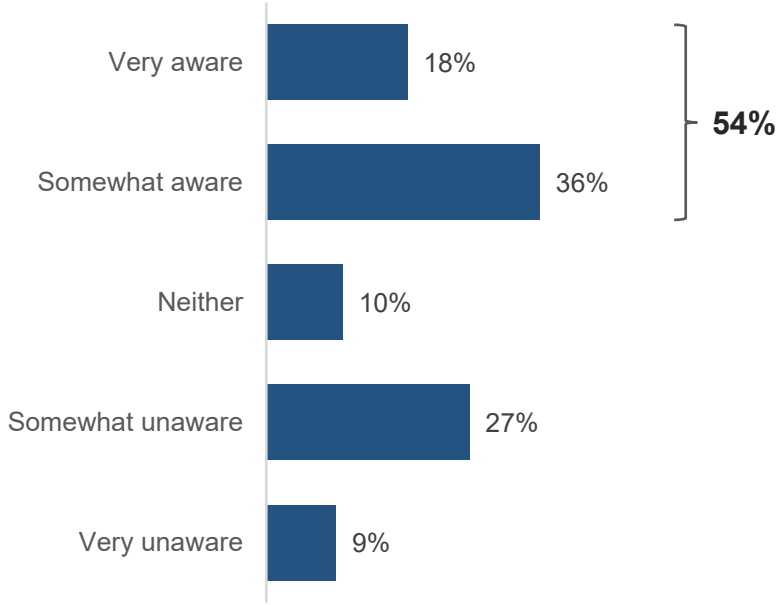
AWARENESS OF OFF-SEASON OFFERINGS

All residents | Segments are defined on slide 6

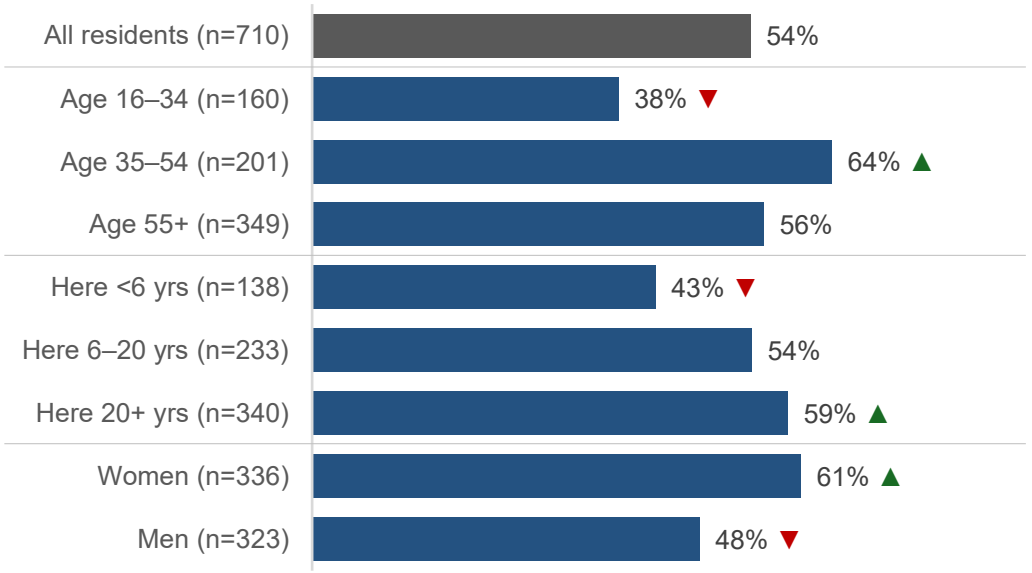
Over half of residents are aware of off-season tourism offerings, a base to build on.

Fifty-four percent are aware of spring, fall and winter tourism activities, 10% are neutral and 36% are unaware. Awareness is highest among residents aged 35–54 (64%) and women (61%), with the most room to grow among residents aged 16–34 (38%) and residents of fewer than six years (43%).

ALL RESIDENTS



AWARE (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=710). Q28 How aware are you of spring, fall, and winter tourism activities and offerings in the Municipality of Kincardine?

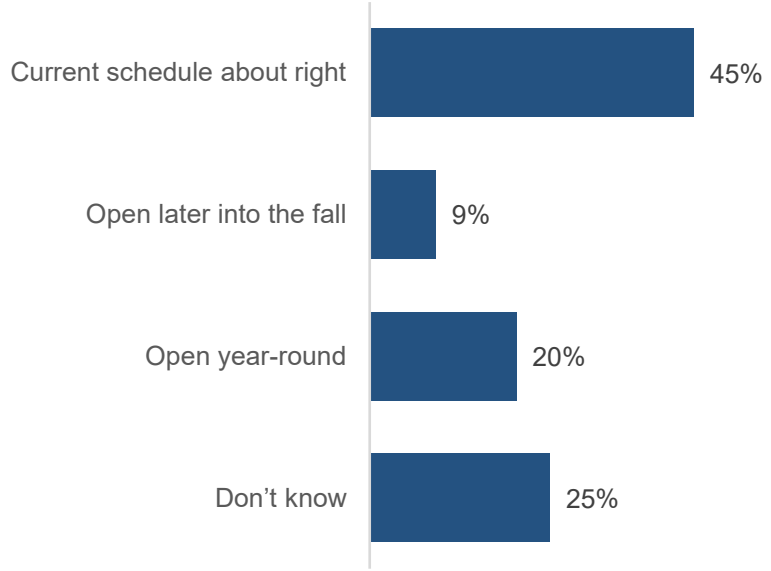
KINCARDINE WELCOME CENTRE SCHEDULE

All residents | Segments are defined on slide 6

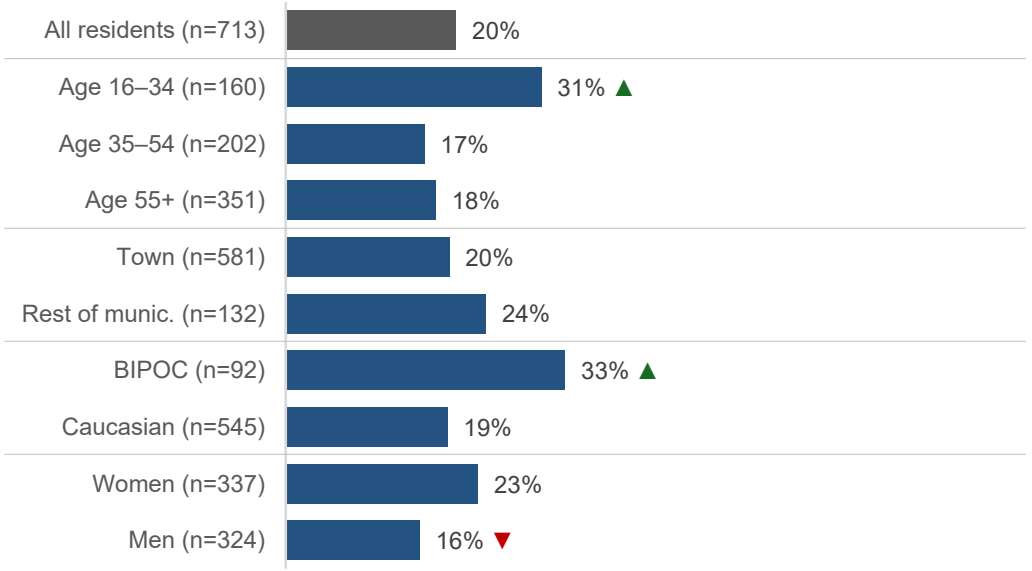
Most residents with a view support the current Welcome Centre schedule, with one in five favouring year-round opening.

Forty-five percent say the current May to mid-October schedule is about right, 20% would like the Centre open year-round and 9% would extend it later into the fall, while 25% do not know. Support for year-round opening is higher among residents aged 16–34 (31%) and BIPOC residents (33%).

ALL RESIDENTS

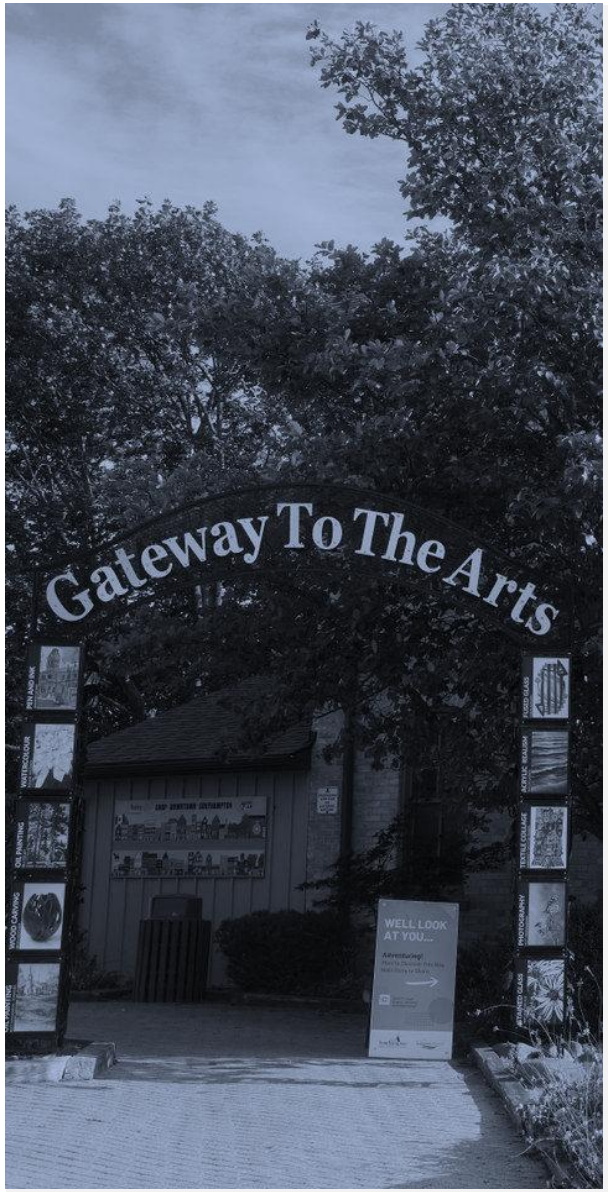


SHOULD BE OPEN YEAR-ROUND BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents (n=713). Q34 The Kincardine Welcome Centre is currently open from May to mid-October. Which of the following best reflects your view?



RESIDENT VOICE & GOVERNANCE

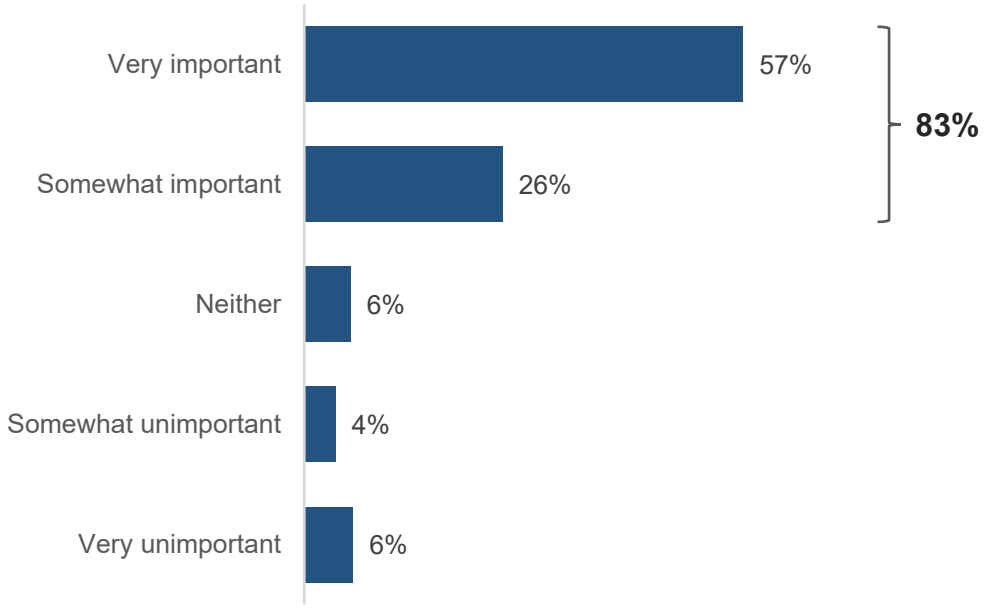
IMPORTANCE OF RESIDENT INPUT

All residents | Segments are defined on slide 6

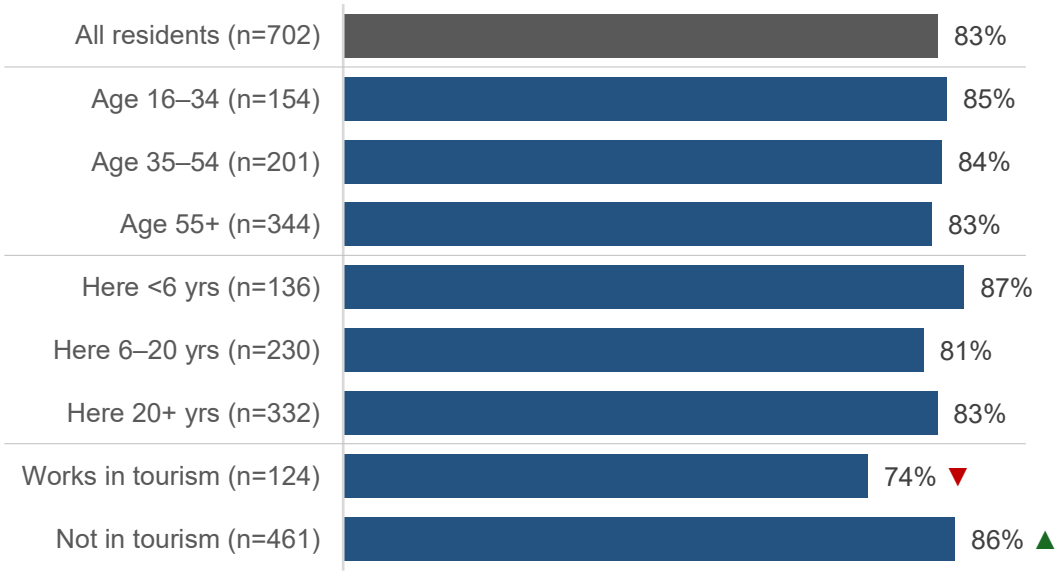
Residents place a high value on having a say in tourism planning.

Eighty-three percent say it is important that residents have meaningful input into tourism planning and decisions, including 57% who say very important. The view is consistent across ages and lengths of residence, and is shared by most residents who work in tourism (74%).

ALL RESIDENTS



IMPORTANT (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=702). Q30 How important is it that residents have meaningful input into tourism planning and decisions in the Municipality of Kincardine?

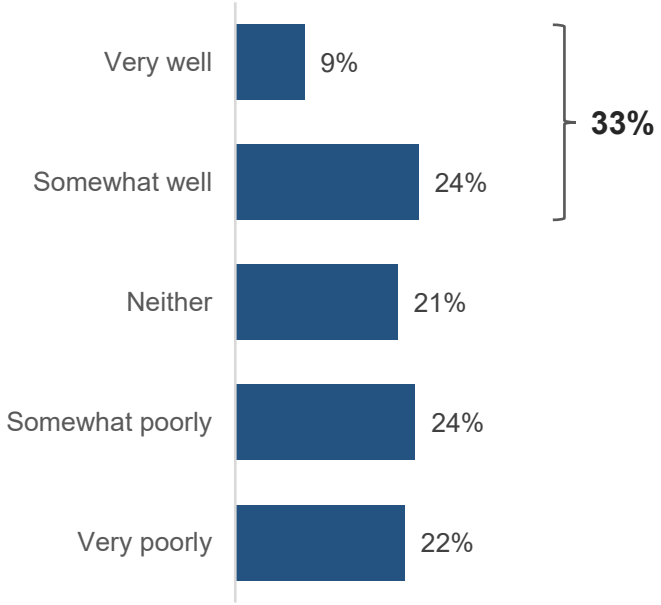
CONSIDERATION OF RESIDENTS' NEEDS

All residents | Segments are defined on slide 6

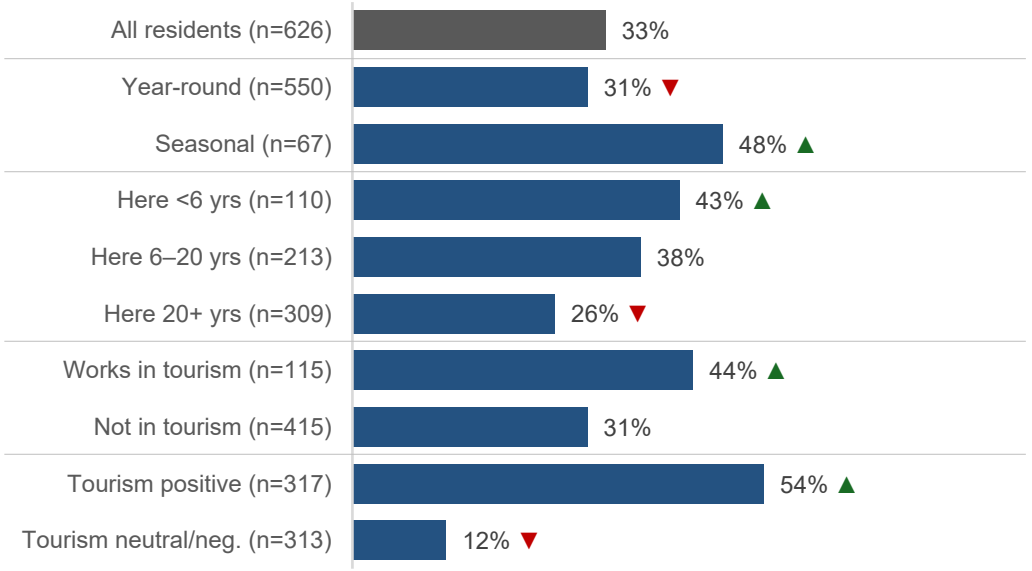
One in three residents feel the Municipality considers their needs well in tourism decisions, a clear opportunity to build confidence.

Thirty-three percent say the Municipality considers residents' needs and concerns well, 21% are neutral and 46% say it does so poorly. Confidence is highest among residents who feel positive about tourism (54%), seasonal residents (48%) and residents who work in tourism (44%), and lower among residents of 20+ years (26%) and those neutral or negative toward tourism (12%).

ALL RESIDENTS



WELL (TOP2) BY SEGMENT



▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=626). Q31 How well do you feel the Municipality of Kincardine considers residents' needs and concerns when making decisions about tourism?

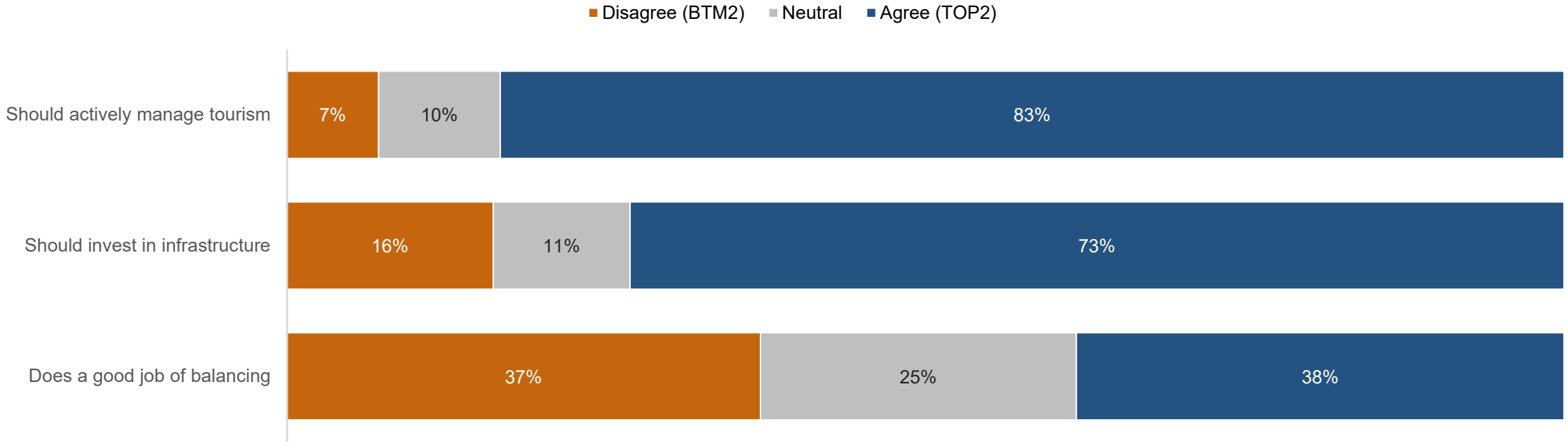
ROLE OF THE MUNICIPALITY

All residents | Segments are defined on slide 6

Residents strongly support the Municipality actively managing tourism and investing in infrastructure.

Eighty-three percent agree the Municipality should actively manage tourism to protect residents' quality of life, and 73% agree it should invest in infrastructure to support responsible growth. Thirty-eight percent agree the Municipality currently does a good job of balancing growth with residents' needs and 37% disagree, pointing to room to build confidence.

AGREEMENT WITH STATEMENTS ABOUT THE MUNICIPALITY'S ROLE



Base: all residents, excluding don't know (n=659–699). Q32 To what extent do you agree or disagree with the following statements?

ROLE OF THE MUNICIPALITY – BY SEGMENT

All residents | Segments are defined on slide 6

Support for active management is shared across every group, while views on the current balance vary by segment.

Support for active management is consistent across the groups shown (83%–85%), and 71% among residents who work in tourism.

Agreement that the Municipality balances growth well ranges from 16% among residents neutral or negative toward tourism to 60% among seasonal residents and those positive toward tourism.

Most residents who are neutral or negative toward tourism also support infrastructure investment for growth (57%).

		TOURISM SENTIMENT (Q12)		RESIDENT TYPE		COMMUNITY		TOURISM SECTOR (Q6)	
Agree (TOP2)	Overall	Positive (n=360)	Neutral/ negative (n=330)	Year-round (n=580)	Seasonal (n=100)	Town (n=566)	Rest of munic. (n=129)	Works in tourism (n=122)	Not in tourism (n=461)
Should actively manage tourism	83%	83%	83%	83%	83%	83%	83%	71% ▼	85%
Should invest in infrastructure	73%	88% ▲	57% ▼	71% ▼	80%	73%	76%	76%	73%
Does a good job of balancing	38%	60% ▲	16% ▼	36% ▼	60% ▲	38%	39%	41%	37%

▲ / ▼ Significantly higher / lower than the rest of residents (95% confidence)

Base: all residents, excluding don't know (n=659–699). Q32 To what extent do you agree or disagree with the following statements? TOP2 = somewhat or strongly agree.

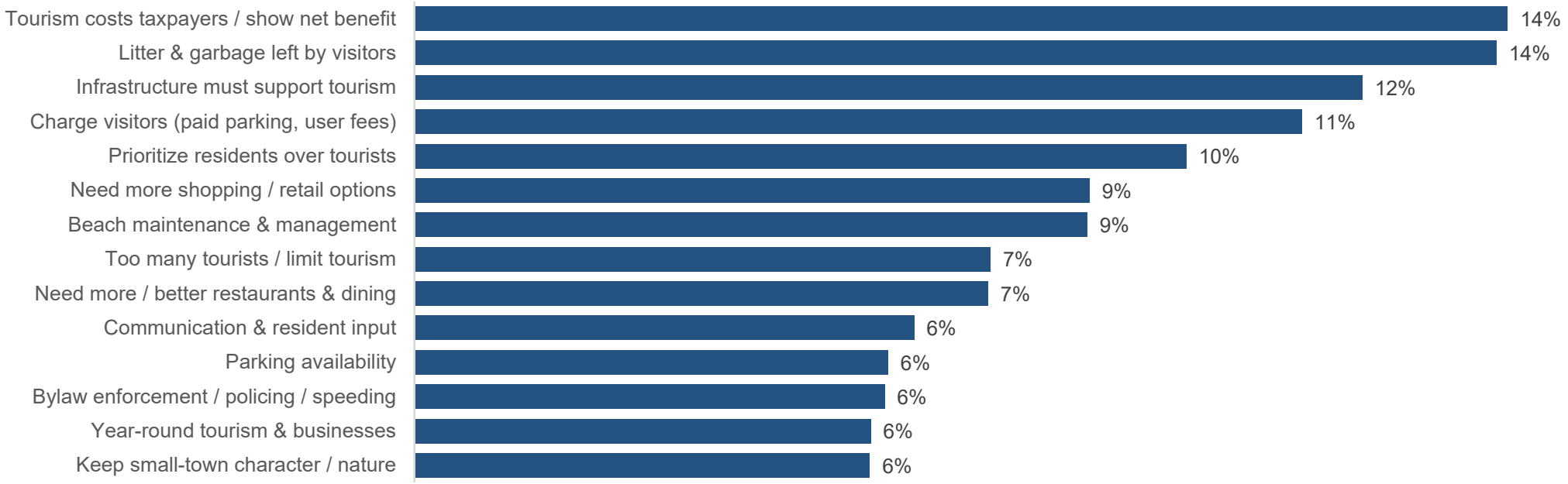
ADDITIONAL COMMENTS ABOUT TOURISM

Residents who provided a comment

Residents' closing comments focus on cost, cleanliness and the resident experience.

The most common themes are the cost of tourism to taxpayers (14%), litter and garbage left by visitors (14%), infrastructure keeping up with tourism (12%) and charging visitors through paid beach parking or user fees (11%). One in ten (10%) ask that residents' needs come first.

MOST COMMON THEMES



Base: residents who provided a comment (n=436). Q33 Is there anything else you would like to share about tourism in the Municipality of Kincardine? Coded open-ended responses; multiple mentions allowed. Top 14 themes shown.



IN THEIR OWN WORDS...

Residents want tourism's costs and benefits made visible, and see a role for visitors in sharing those costs.

Show the net benefit

"I would love to see the breakdown of how tourism impacts our community. Without the stats, it's hard to know if the positive outweighs the negative."

Charge visitors

"Charge for parking at Station beach with free parking for local residents ie a window sticker for locals."

Residents first

"I believe tourism can have a place in communities but it shouldn't be at the expense of the people that live here."

Litter and cleanliness

"Promote more 'take your garbage with you' at the beaches/parks you brought food and containers in, it is just as easy to take out again. More recycling options at beaches/parks is needed."

Year-round businesses

"We need to attract more businesses that can service the residents year-round, not just tourists."

Protect what makes Kincardine special

"We have a beautiful town and beach. Happy to share with visitors but would like the natural beauty to be protected."

Resident input

"More participation by resident taxpayers in tourism planning and decisions"