CONTEXT IS EVERYTHING

KINCARDINE TOURISM STRATEGY – VISITOR SURVEY

Final Report

Prepared for: Municipality of Kincardine & RTO7

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Alex Mazanik, CAIP
amazanik@crg.ca
(416) 820-7026

William Schatten, CAIP
wschatten@crg.ca
(416) 388-9455

50 Carroll Street, Toronto, Ontario

www.crg.ca

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 Visitor Survey, which measures who visits Kincardine, why they come, how they experience the destination and what they spend. Findings are designed to give the Municipality a clear picture of its visitor base and the opportunities to grow visitation, length of stay and spending across the seasons.

Objectives:
The objectives of this survey are to evaluate:

- Visitor profile and trip characteristics, including origin, travel party, length of stay and accommodation
- Motivations for visiting, trip planning and the information sources that drive awareness
- Activities, satisfaction with the visit and with specific aspects of the destination
- Likelihood to recommend and to return, including in the spring, fall and winter
- Visitor spending and perceived value for money
- Kincardine's competitive position and the role of its Scottish-influenced cultural traditions
- Preferences for visitor information services and what would most strengthen Kincardine's appeal



METHODOLOGY

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

Qualifying Criteria:
- Aged 16 or older
- Does not live in, seasonally occupy a property in, or temporarily work in the Municipality of Kincardine
- Visited the Municipality of Kincardine in the past 12 months

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

Total Sample:
- Visitors: n=426

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

Median Length of Interview:
- 12.3 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 visitors at the 95% confidence level.
- Proportions are compared using two-tailed tests.

Weighting:
Visitor results are unweighted, as there is no population benchmark for Kincardine's visitors.

Small Sample Sizes:
Segments with a base under 30 are marked with an asterisk and not tested; results should be interpreted with caution. Winter visitors (n=7) are included in Overall but not shown separately.



DEFINITIONS

Visitor: Aged 16 or older, does not live or work in the Municipality of Kincardine, and visited in the past 12 months. Results describe each visitor's most recent visit.

Trip type: Day trip vs. overnight trip (Q4).

Visit frequency: Occasional visitors (first visit, or 2–5 visits in the past three years) vs. frequent visitors (6+ visits in the past three years) (Q5V, Q5A).

Age: 16–34, 35–54 and 55+ (SC1).

Season of visit: Season of the most recent visit: spring (April–June), summer (July–August) and fall (September–November) (Q1B).

Gender: Women vs. men (Q0).

NPS group: Promoters (9–10 on likelihood to recommend) vs. passives and detractors (0–8) (Q16).

Net Promoter Score (NPS): The percentage of promoters minus the percentage of detractors (0–6).

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 visitors, at the 95% confidence level.

ALIGNMENT WITH THE WEALTH & WELLBEING INDEX – VISITORS

Methodology | Visitor experience scorecard

The visitor scorecard is built to connect with the Experience side of Destination Canada's Wealth & Wellbeing Index.

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

Satisfaction, recommendation, value, comparison with other destinations and return intent are close proxies for Index indicators that Destination Canada measures with national booking, spending and brand data.

Length of stay and visitor spending also map to the Index but sit outside the scorecard because they are not percentages.

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

Index sub-index	Index category	Kincardine visitor indicator
Experience	Visitor Experience	Satisfied with visit overall
	Visitor Experience	Net Promoter Score (NPS)
	Cost of Travel	Good value for money
	Place Brand	Rated above comparable Ontario destinations
	Visitor Experience	Likely to return in summer / fall
	Visitor Experience	Likely to return in spring / winter
Enablement	Transportation System	Satisfied with transportation
Engagement	Cultural Vibrancy	Scottish traditions contributed to visit

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



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – THE VISITOR EXPERIENCE

ALL VISITORS

Visitors are highly satisfied with Kincardine and eager to recommend it. More than nine in ten (92%) are satisfied with their visit, including 78% who are very satisfied. Seven in ten (72%) are promoters, giving Kincardine a Net Promoter Score of +66, and 83% rate their visit as good value for money. (See slides 26, 30, 36)

Kincardine stands out against comparable destinations. Three in four visitors (75%) rate Kincardine above other Ontario lakefront and rural destinations they have visited, including 36% who rate it much higher than average. Ratings are highest among overnight visitors (81%) and occasional visitors (81%). (See slide 38)

The beach, the community's ambiance and its cleanliness define the experience. Satisfaction is near-universal for beaches and waterfront access (97%), the overall ambiance of the community (95%) and the cleanliness of public spaces (94%), and remains high for the friendliness of residents (92%), dining (91%) and parking (89%). (See slide 27)

Overnight visitors have the strongest experience. Overnight visitors are more likely than day-trippers to be very satisfied (83% vs. 73%) and to give Kincardine a higher Net Promoter Score (+75 vs. +55), and they rate the community's ambiance, dining, retail and friendliness more highly. (See slides 26, 28, 30)



EXECUTIVE SUMMARY – WHO VISITS AND WHY

ALL VISITORS

Kincardine's visitor base is loyal, Ontario-based and connected to the area. Nine in ten visitors live in Ontario (91%), led by Grey–Bruce (23%), Waterloo–Guelph (18%), the GTA (18%) and London and Southwestern Ontario (17%). Nearly all have visited before (93%), and more than one-third (35%) have visited more than 10 times in the past three years. (See slides 14, 17)

The beach is the leading draw, alongside familiarity and personal ties. Beaches and waterfront access (58%) is the top motivation, followed by familiarity from previous visits (45%), visiting friends or family (39%), dining and shopping (38%) and a personal connection to the area (38%). Three in ten (30%) cite the Scottish-influenced cultural traditions, and 32% attended a Scottish cultural event or tradition. (See slides 19, 20)

Word of mouth and past visits drive awareness, and many trips are planned at short notice. Recommendations from family or friends (46%) and previous visits (44%) are the main ways visitors found out about Kincardine. Four in ten (42%) planned their trip less than two weeks ahead, rising to 67% of day-trippers, while 32% of overnight visitors planned five or more months ahead. (See slides 22, 23)

Overnight trips deliver most of the visitor spending. Overnight visitors (58% of visitors, averaging 4.5 nights) spend an average of $1,623 per travel party per trip, compared with $405 for day trips. Hotels and motels (34%) and friends or family (31%) are the most common places to stay. (See slides 16, 35)



EXECUTIVE SUMMARY – OPPORTUNITIES TO GROW

ALL VISITORS

Visitors are ready to come back beyond the summer. Nine in ten (91%) are likely to return in summer, and most are also likely to return in the fall (78%) and spring (72%). Winter return intent (37%) rises to 63% of frequent visitors and 47% of day-trippers. More events or festivals (32%) and lower prices or shoulder-season promotions (31%) lead what would make a fall or winter visit more appealing. (See slides 31, 32, 33)

Visitors' own suggestions centre on more to do, eat and buy. Asked what would most strengthen Kincardine's appeal, visitors most often mention more events and festivals (14%), more or better restaurants (13%), more shopping (13%) and affordability (11%), while 9% would keep Kincardine just as it is. (See slides 43, 44)

Visitor services are strong overall, with transportation the main area to grow. Satisfaction with transportation reliability and access (56%) trails other aspects of the visit. Two-thirds of visitors with a view (66%) feel the Welcome Centre's May to mid-October schedule is about right, and preferences for information services are spread across a dedicated building, kiosks, digital and mobile options. (See slides 27, 40, 41)

VISITOR EXPERIENCE SCORECARD

All visitors | Segments are defined on slide 6

Ten indicators set a baseline for tracking the visitor experience as the Tourism Strategy is implemented.

Satisfaction (92%), value for money (83%) and a Net Promoter Score of +66 are clear strengths, and three in four visitors rate Kincardine above other Ontario lakefront and rural destinations (75%).

Return intent is strongest for summer (91%) and fall (78%), with winter (37%) offering the most room to grow.

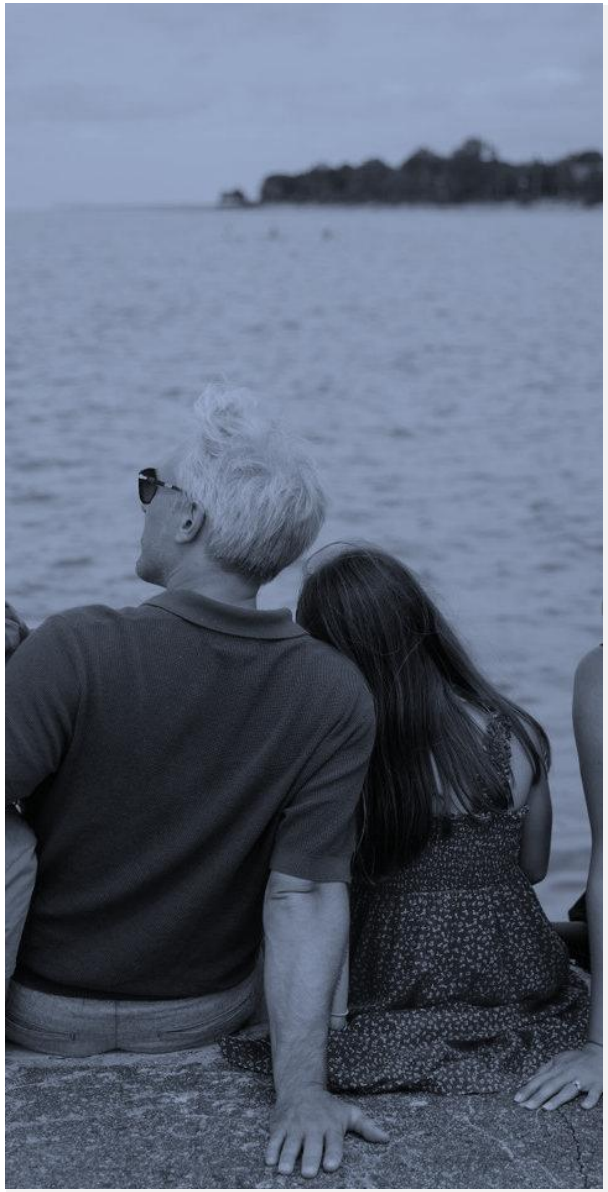
Transportation (56%) is the visitor service with the most room to improve.

Overnight visitors score higher than day-trippers on most experience measures, while day-trippers and frequent visitors are more open to off-season return.

		TRIP TYPE		VISIT FREQUENCY		SEASON OF VISIT		
Indicator	Overall (n=426)	Day trip (n=179)	Overnight (n=244)	Occasional (n=215)	Frequent (n=202)	Spring (n=77)	Summer (n=301)	Fall (n=38)
Satisfied with visit overall	92%	89%	94%	95% ▲	89% ▼	90%	93%	92%
Net Promoter Score (NPS)	+66	+55 ▼	+75 ▲	+69	+66	+54	+71 ▲	+63
Good value for money	83%	80%	85%	85%	80%	86%	83%	78%
Rated above other Ontario lakefront / rural destinations	75%	66% ▼	81% ▲	81% ▲	68% ▼	72%	77%	69%
Likely to return in summer	91%	90%	91%	89%	93%	86%	93% ▲	81% ▼
Likely to return in fall	78%	85% ▲	72% ▼	66% ▼	91% ▲	72%	77%	94% ▲
Likely to return in spring	72%	80% ▲	66% ▼	56% ▼	89% ▲	87% ▲	68% ▼	67%
Likely to return in winter	37%	47% ▲	30% ▼	12% ▼	63% ▲	39%	39%	14% ▼
Satisfied with transportation	56%	47% ▼	63% ▲	64% ▲	47% ▼	*57%*	57%	*59%*
Scottish traditions contributed to visit	49%	46%	51%	54% ▲	43% ▼	43%	52% ▲	39%

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

Base: all visitors, excluding don't know and not applicable (n=160–426). Q11V, Q12, Q13V, Q16, Q18, Q20, Q21. Segment bases shown for Q12.
NPS = % promoters (9–10) minus % detractors (0–6).



VISITOR PROFILE & TRIP CHARACTERISTICS

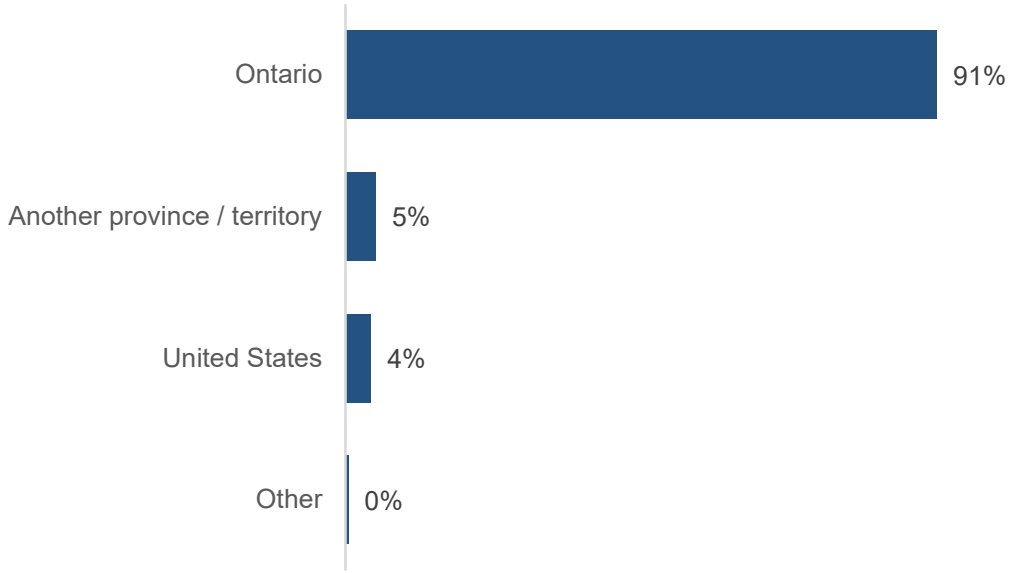
WHERE VISITORS COME FROM

All visitors

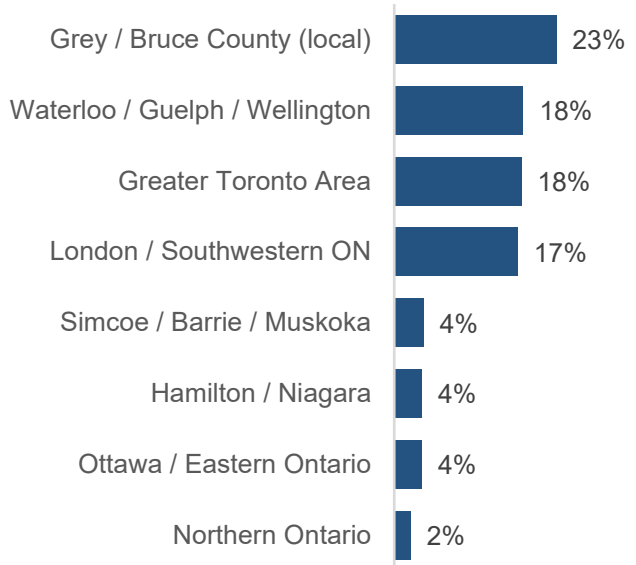
Kincardine draws mainly from Ontario, with a strong regional and Southwestern Ontario base.

Nine in ten visitors (91%) live in Ontario, with 5% from another Canadian province and 4% from the United States. Among Ontario visitors, the local Grey–Bruce area (23%), Waterloo–Guelph–Wellington (18%), the Greater Toronto Area (18%) and London and Southwestern Ontario (17%) together account for three-quarters of visitors.

PLACE OF RESIDENCE



REGION OF ONTARIO (ONTARIO RESIDENTS)



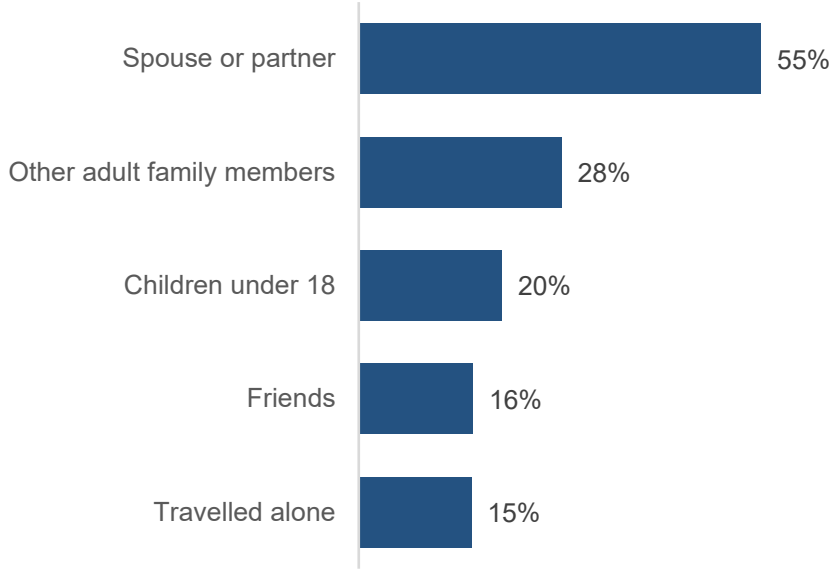
Base: all visitors (n=426); Ontario residents (n=387). Q1 Where do you live? Q1A Which region of Ontario are you from? Other regions (10%) not shown.

TRAVEL PARTY
All visitors

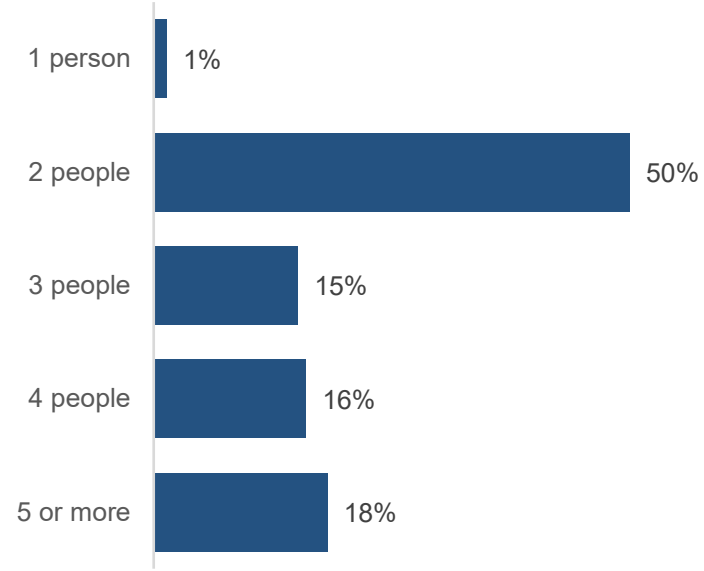
Most visitors travel as couples or with family.

More than half (55%) travelled with a spouse or partner, 28% with other adult family members and 20% with children under 18, while 15% travelled alone. Half of travel parties (50%) were two people, and the average party size is 3.4. Visitors aged 35–54 are the most likely to bring children (45%), and those aged 16–34 to travel with friends (45%).

WHO VISITORS TRAVELLED WITH



TRAVEL PARTY SIZE (THOSE NOT TRAVELLING ALONE)



Base: all visitors (n=426); visitors not travelling alone (n=359). Q2 Which of the following best describes who you travelled with on your last visit? Multiple responses allowed.
Q3 Including yourself, how many people were in your travel party?

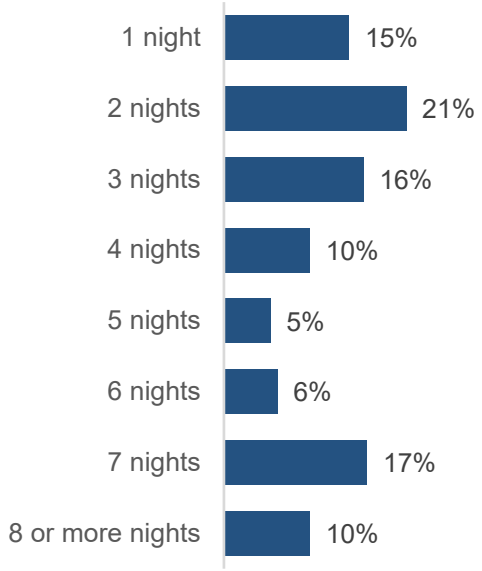
LENGTH OF STAY AND ACCOMMODATION

Overnight visitors

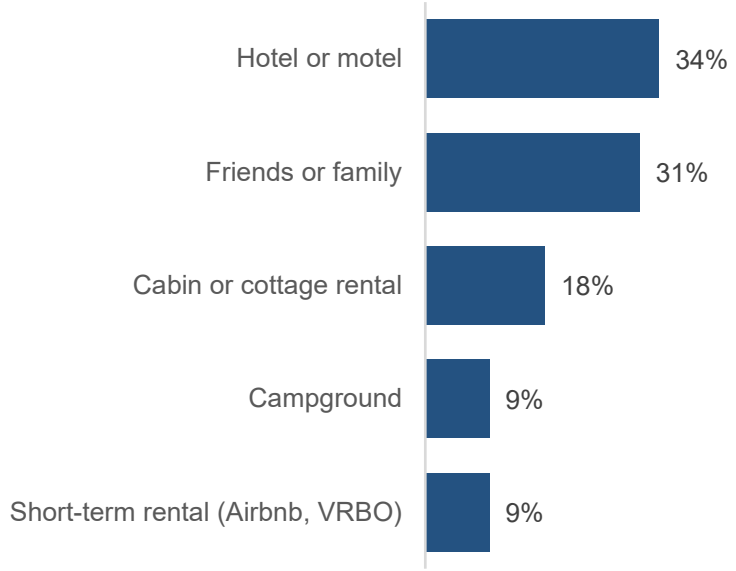
Six in ten visitors stay overnight, typically for several nights.

Fifty-eight percent of visitors stayed overnight on their most recent trip, averaging 4.5 nights, and one in four overnight visitors (27%) stayed a week or longer. Hotels and motels (34%) and friends or family (31%) are the most common places to stay, followed by cabin or cottage rentals (18%), campgrounds (9%) and short-term rentals (9%). Overnight stays are more common among occasional visitors (71%) and visitors aged 16–34 (74%).

NIGHTS STAYED (OVERNIGHT VISITORS)



WHERE OVERNIGHT VISITORS STAYED



Base: overnight visitors (n=241 / n=245). Q4A How many nights did you stay in the Kincardine area? Q4B Where did you stay? Multiple responses allowed.

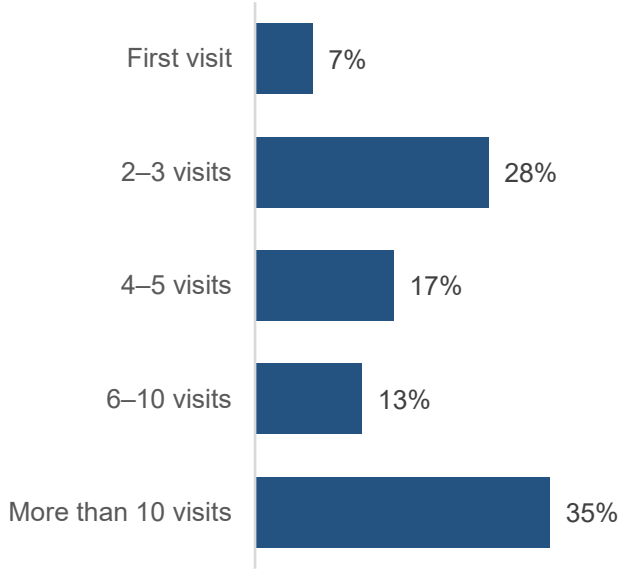
VISIT HISTORY AND TRIP PATTERN

All visitors

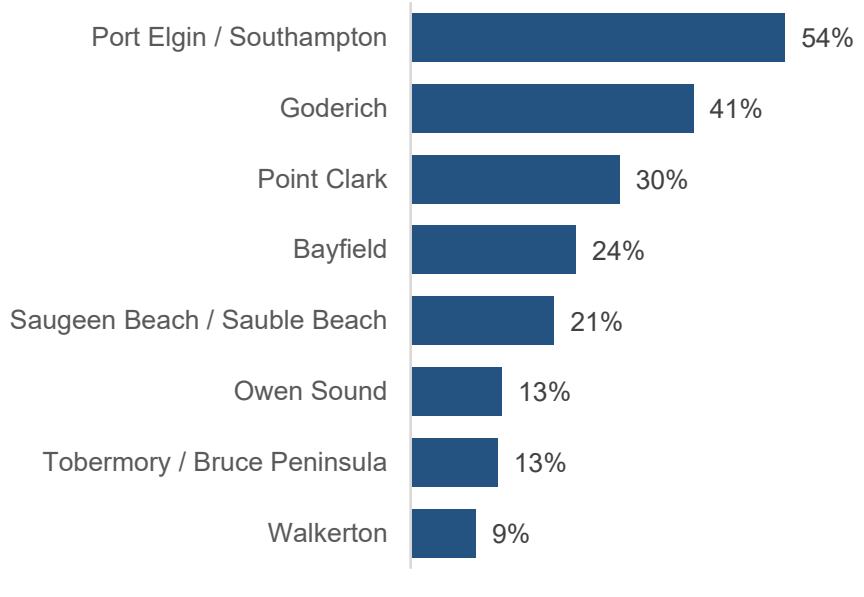
Kincardine's visitors are overwhelmingly repeat guests, and many combine their visit with nearby communities.

Nearly all visitors (93%) have been to Kincardine before, and more than one-third (35%) have visited more than 10 times in the past three years; 7% were on their first visit. Four in ten (38%) combined Kincardine with other communities on the same trip, most often Port Elgin and Southampton (54%), Goderich (41%) and Point Clark (30%), positioning Kincardine within a wider Lake Huron itinerary.

VISITS IN THE PAST THREE YEARS (INCL. THIS VISIT)



OTHER COMMUNITIES VISITED ON THE SAME TRIP



Base: all visitors, excluding not sure (n=420); visitors who combined Kincardine with other communities (n=160). Q5 Was this your first visit? Q5A How many times have you visited in the past 3 years, including this visit? Q6A Which other communities did you visit on this trip? Multiple responses allowed.



MOTIVATION, PLANNING & ACTIVITIES

MOTIVATIONS FOR VISITING

All visitors | Segments are defined on slide 6

The beach is the leading draw, supported by familiarity and personal ties to the area.

Beaches and waterfront access (58%) is the top motivation, followed by familiarity from previous visits (45%), visiting friends or family (39%), dining and shopping (38%) and a personal connection to the area (38%). Three in ten (30%) cite the Scottish-influenced cultural traditions.

Overnight visitors are more likely to come for the beach (64%) and to visit friends or family (46%), while day-trippers more often come for dining and shopping (48%).

Frequent visitors more often cite a personal connection (50%), and visitors aged 55+ the Scottish traditions (33%) and events (20%).

		TRIP TYPE		VISIT FREQUENCY		AGE		
Motivation	Overall (n=426)	Day trip (n=181)	Overnight (n=245)	Occasional (n=217)	Frequent (n=203)	16–34 (n=42)	35–54 (n=125)	55+ (n=259)
Beaches & waterfront access	58%	49% ▼	64% ▲	59%	57%	62%	63%	54%
Familiarity from previous visits	45%	40% ▼	49% ▲	46%	46%	38%	38%	50% ▲
Visiting friends or family	39%	30% ▼	46% ▲	34% ▼	46% ▲	43%	38%	39%
Dining, shopping & local business	38%	48% ▲	31% ▼	32% ▼	46% ▲	31%	36%	41%
Personal connection to the area	38%	36%	40%	27% ▼	50% ▲	24% ▼	37%	41%
Scottish-influenced cultural traditions	30%	29%	30%	29%	30%	38%	19% ▼	33% ▲
A specific event or festival	15%	19%	13%	13%	18%	12%	7% ▼	20% ▲
Accessible and affordable destination	13%	10%	15%	9% ▼	17% ▲	12%	11%	14%
Outdoor recreation	12%	12%	13%	10%	15%	29% ▲	10%	11%
Arts and cultural experiences	7%	8%	5%	6%	8%	10%	3%	8%
Passing through / en route	5%	10% ▲	2% ▼	6%	4%	7%	6%	5%

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

Base: all visitors (n=426). Q8 What motivated you to visit the Municipality of Kincardine? Multiple responses allowed. Other (12%) not shown.

ACTIVITIES DURING THE VISIT

All visitors | Segments are defined on slide 6

Dining, shopping and exploring the town are the most common activities, alongside the beach and the Scottish traditions.

Seven in ten visitors (71%) dined out, 63% shopped at a retail store and 55% explored the town, while 46% visited a farmers' or local market and 45% spent time at the beach. One in three (32%) attended a Scottish cultural event or tradition.

Overnight visitors take part in more activities, including the beach (58%), sightseeing (66%) and Scottish events (38%).

Summer visitors are more likely to spend time at the beach (64%) and attend Scottish events (37%) and festivals (21%).

		TRIP TYPE		SEASON OF VISIT			AGE		
Activity	Overall (n=426)	Day trip (n=181)	Overnight (n=245)	Spring (n=78)	Summer (n=303)	Fall (n=38)	16–34 (n=42)	35–54 (n=125)	55+ (n=259)
Dining at a restaurant, café, pub or brewery	71%	62% ▼	78% ▲	74%	71%	63%	67%	70%	72%
Shopping at a retail store	63%	59%	66%	62%	64%	63%	43% ▼	62%	67% ▲
Sightseeing / exploring the town	55%	41% ▼	66% ▲	53%	56%	58%	55%	59%	54%
Farmers' or local market	46%	40% ▼	50% ▲	37%	49% ▲	37%	45%	46%	46%
Swimming / time at the beach	45%	28% ▼	58% ▲	0% ▼	64% ▲	0% ▼	64% ▲	54% ▲	38% ▼
Scottish cultural event or tradition	32%	25% ▼	38% ▲	18% ▼	37% ▲	24%	40%	27%	34%
Museum or historic site	19%	12% ▼	23% ▲	10% ▼	21% ▲	16%	24%	19%	17%
Concert, festival or major event	18%	17%	19%	14%	21% ▲	5% ▼	19%	18%	19%
Hiking	15%	13%	17%	13%	16%	18%	24%	17%	13%
Art gallery	14%	8% ▼	19% ▲	13%	14%	26% ▲	17%	10%	16%
Cultural performance or arts event	11%	9%	13%	5%	13%	16%	14%	10%	12%
Cycling or mountain biking	9%	8%	10%	8%	10%	5%	7%	11%	8%

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

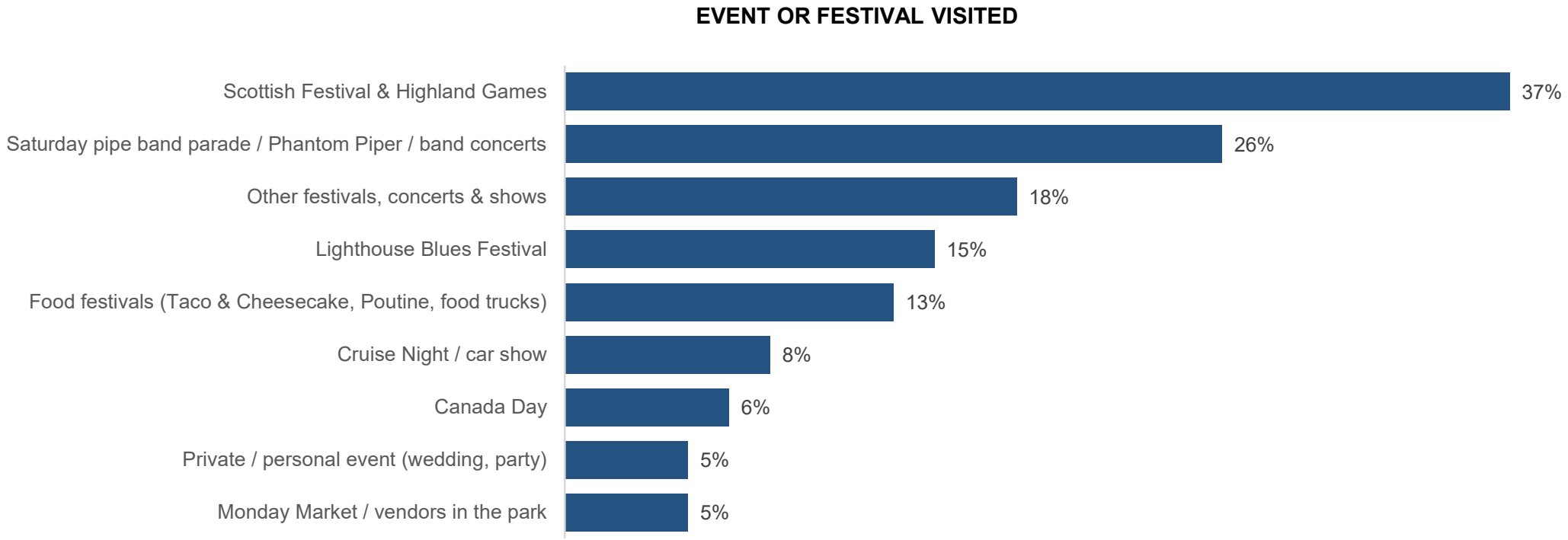
Base: all visitors (n=426). Q7 What activities did you participate in during your visit? Multiple responses allowed. Top 12 activities shown.

EVENTS AND FESTIVALS THAT MOTIVATED THE VISIT

Visitors motivated by a specific event or festival

The Scottish Festival and the pipe band traditions are the events most likely to bring visitors to Kincardine.

Among visitors who came for a specific event or festival, more than one-third (37%) attended the Scottish Festival and Highland Games and one in four (26%) a pipe band parade, the Phantom Piper or a band concert. The Lighthouse Blues Festival (15%), food festivals (13%), Cruise Night (8%) and Canada Day (6%) round out a varied events calendar.



Base: visitors motivated by a specific event or festival who named it (n=62). Q8A What event or festival did you visit? Coded open-ended responses; multiple mentions allowed. Small base; interpret with caution.

HOW VISITORS FOUND OUT ABOUT KINCARDINE

All visitors | Segments are defined on slide 6

Word of mouth and past experience are the main ways visitors discover Kincardine.

Recommendations from family or friends (46%) and previous visits (44%) lead by a wide margin, and a further 14% say they grew up in or have family roots in the area. Among promotional channels, the Municipality's website or social media (13%), other social media (11%) and event listings (10%) lead.

Day-trippers are more likely to have found Kincardine through the Municipality's channels (19%), Explore the Bruce (12%) and event listings (16%).

Fall visitors more often point to a previous visit (61%).

		TRIP TYPE		SEASON OF VISIT			AGE		
Source	Overall (n=426)	Day trip (n=181)	Overnight (n=245)	Spring (n=78)	Summer (n=303)	Fall (n=38)	16–34 (n=42)	35–54 (n=125)	55+ (n=259)
Family or friends recommendation	46%	38% ▼	53% ▲	35% ▼	48%	50%	55%	51%	42%
Previous visit	44%	51% ▲	39% ▼	36%	45%	61% ▲	43%	35% ▼	49% ▲
Municipality of Kincardine website / social	13%	19% ▲	9% ▼	9%	15%	8%	5%	12%	15%
Other social media	11%	13%	9%	8%	13% ▲	0% ▼	10%	10%	11%
Event or festival listing	10%	16% ▲	5% ▼	8%	10%	11%	0% ▼	10%	11%
Explore the Bruce website / social	7%	12% ▲	4% ▼	4%	9% ▲	0%	2%	7%	8%
Visitor information centre	6%	7%	5%	4%	7%	3%	0%	6%	7%
Printed materials or brochures	6%	9% ▲	3% ▼	8%	5%	8%	2%	5%	7%
Online travel / review sites	3%	4%	2%	5%	3%	3%	0%	5%	3%
Bruce Grey Simcoe website / social	3%	5% ▲	1% ▼	0%	4%	3%	0%	2%	3%

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

Base: all visitors (n=426). Q9 How did you find out about the Municipality of Kincardine? Multiple responses allowed. Top 10 sources shown; Other (24%) includes grew up / family roots (14%).

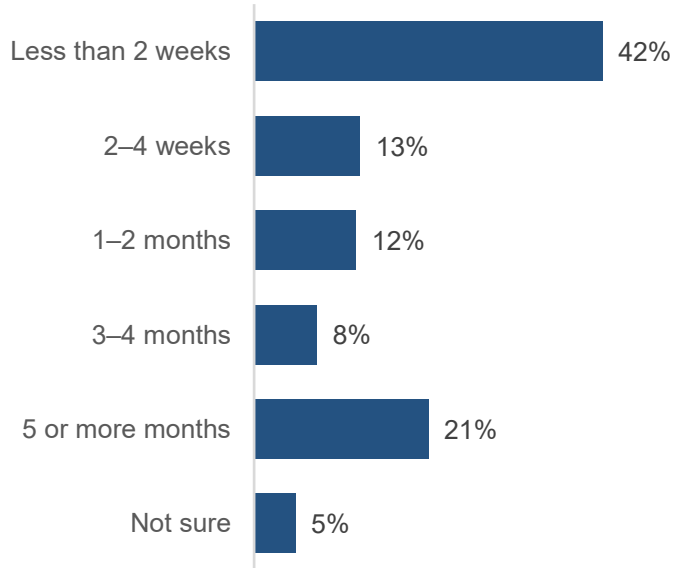
TRIP PLANNING WINDOW

All visitors | Segments are defined on slide 6

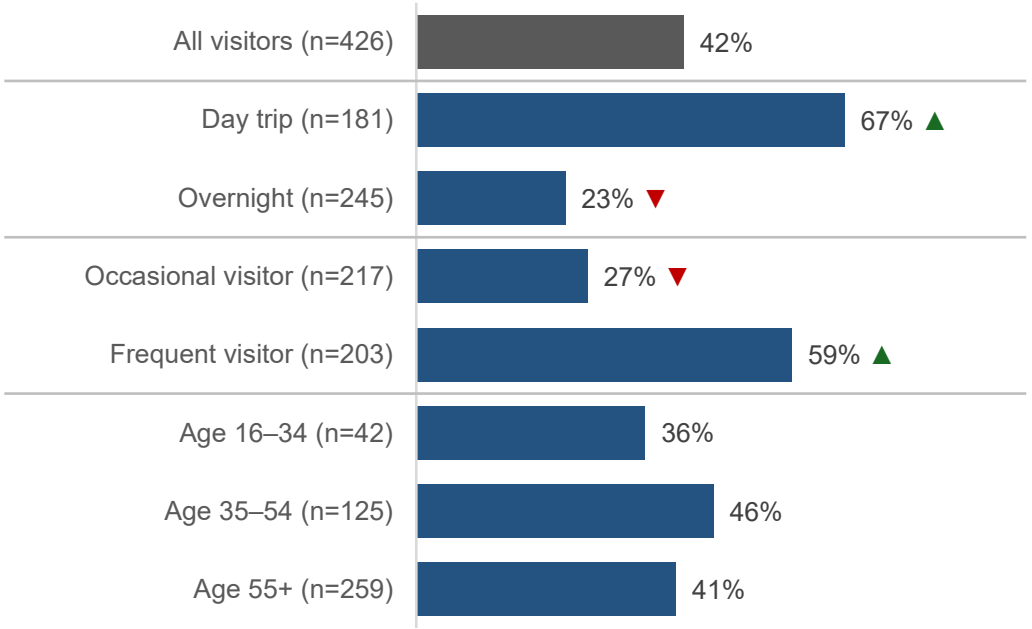
Many visits are planned at short notice, while overnight trips are often planned well ahead.

Four in ten visitors (42%) started planning less than two weeks before their visit, and one in five (21%) five or more months ahead. Short-notice planning is most common among day-trippers (67%) and frequent visitors (59%), while overnight visitors are more likely to plan five or more months ahead (32%), giving the Municipality two distinct windows for promotion.

ALL VISITORS



PLANNED LESS THAN 2 WEEKS AHEAD BY SEGMENT



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

Base: all visitors (n=426). Q9A How far in advance did you start planning your visit to the Municipality of Kincardine?

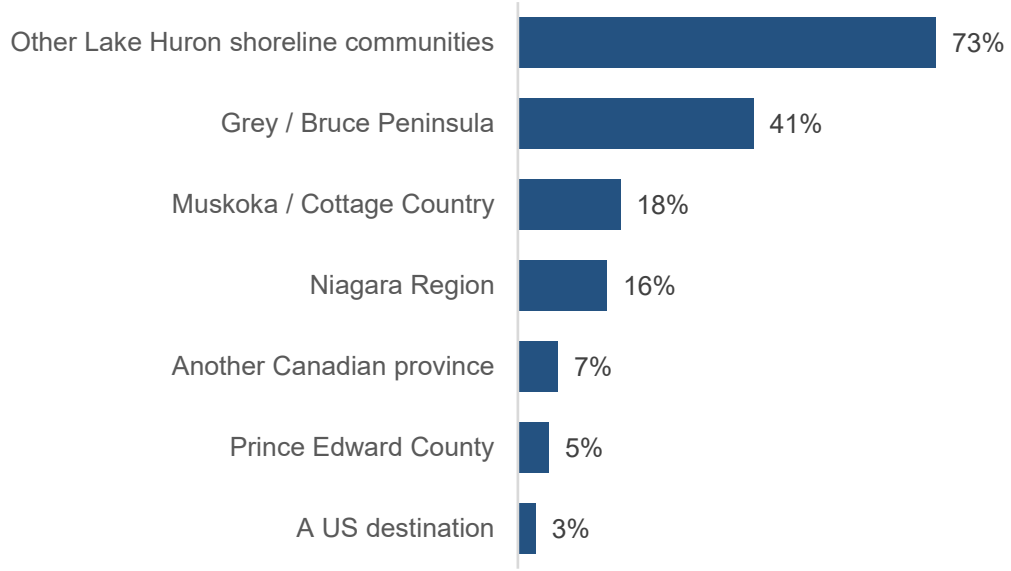
DESTINATIONS CONSIDERED

All visitors | Segments are defined on slide 6

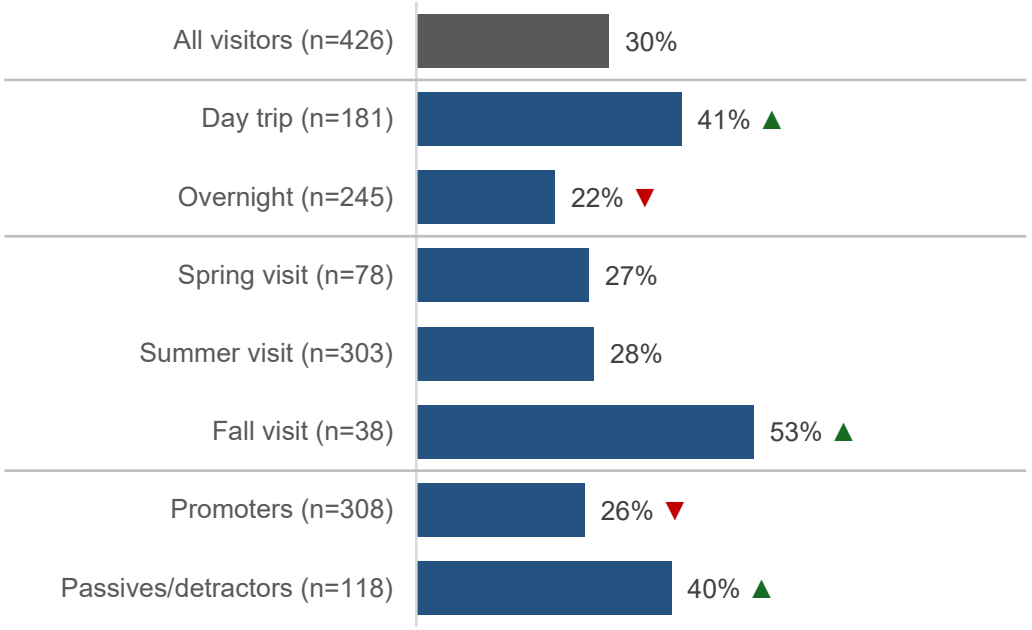
Most visitors choose Kincardine without weighing alternatives, and those who do compare it mostly with nearby Lake Huron destinations.

Two-thirds (65%) did not consider other destinations. Among the 30% who did, other Lake Huron shoreline communities (73%) and the Grey–Bruce Peninsula (41%) were the main alternatives, well ahead of Muskoka (18%) and Niagara (16%). Day-trippers (41%) and fall visitors (53%) were more likely to consider other options, while promoters were less likely to (26%).

DESTINATIONS CONSIDERED (THOSE WHO CONSIDERED OTHERS)

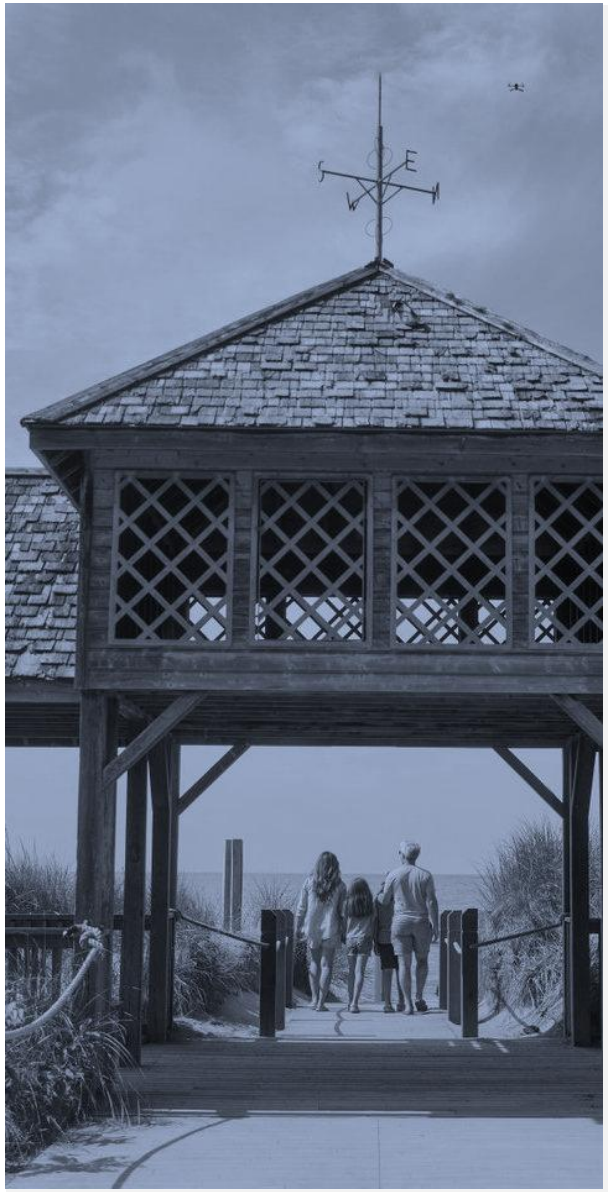


CONSIDERED OTHER DESTINATIONS BY SEGMENT



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

Base: all visitors (n=426); visitors who considered other destinations (n=128). Q10 Before deciding to visit Kincardine, did you consider visiting any other destinations? Q10A Which other destinations did you consider? Multiple responses allowed.



VISITOR EXPERIENCE & SATISFACTION

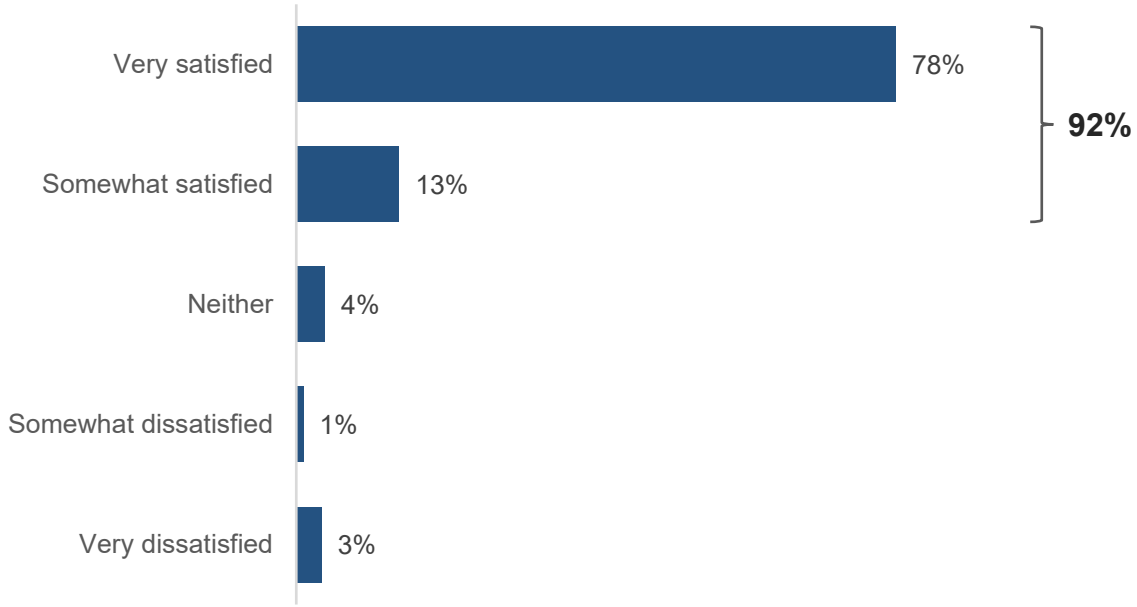
OVERALL SATISFACTION WITH THE VISIT

All visitors | Segments are defined on slide 6

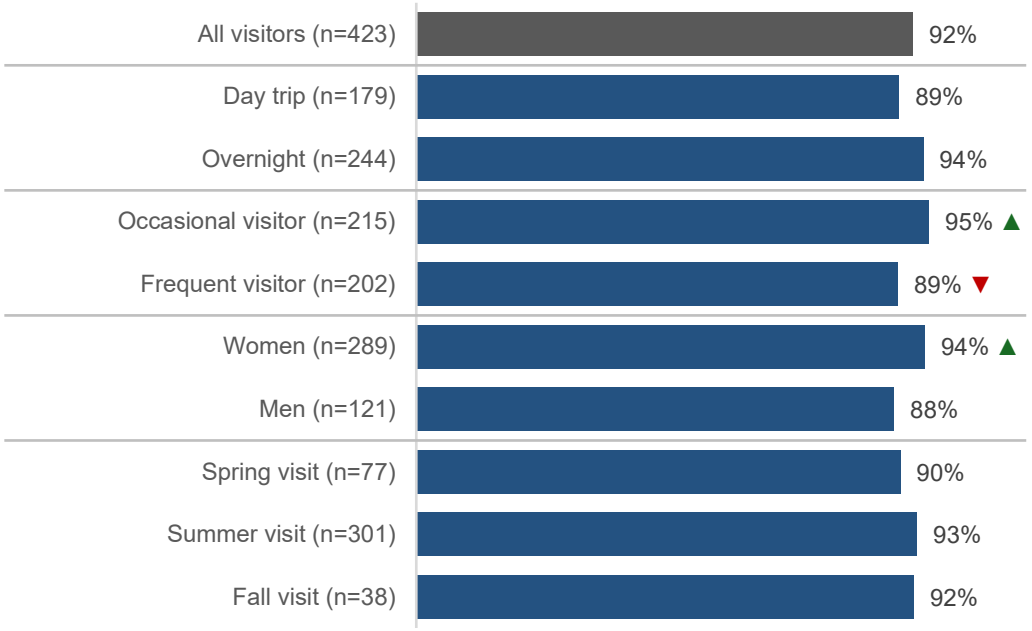
More than nine in ten visitors are satisfied with their visit, and most are very satisfied.

Ninety-two percent are satisfied with their visit to Kincardine, including 78% who are very satisfied. Satisfaction is high across every segment, and strongest among occasional visitors (95%) and women (94%). Overnight visitors are more likely than day-trippers to be very satisfied (83% vs. 73%).

ALL VISITORS



SATISFIED (TOP2) BY SEGMENT



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

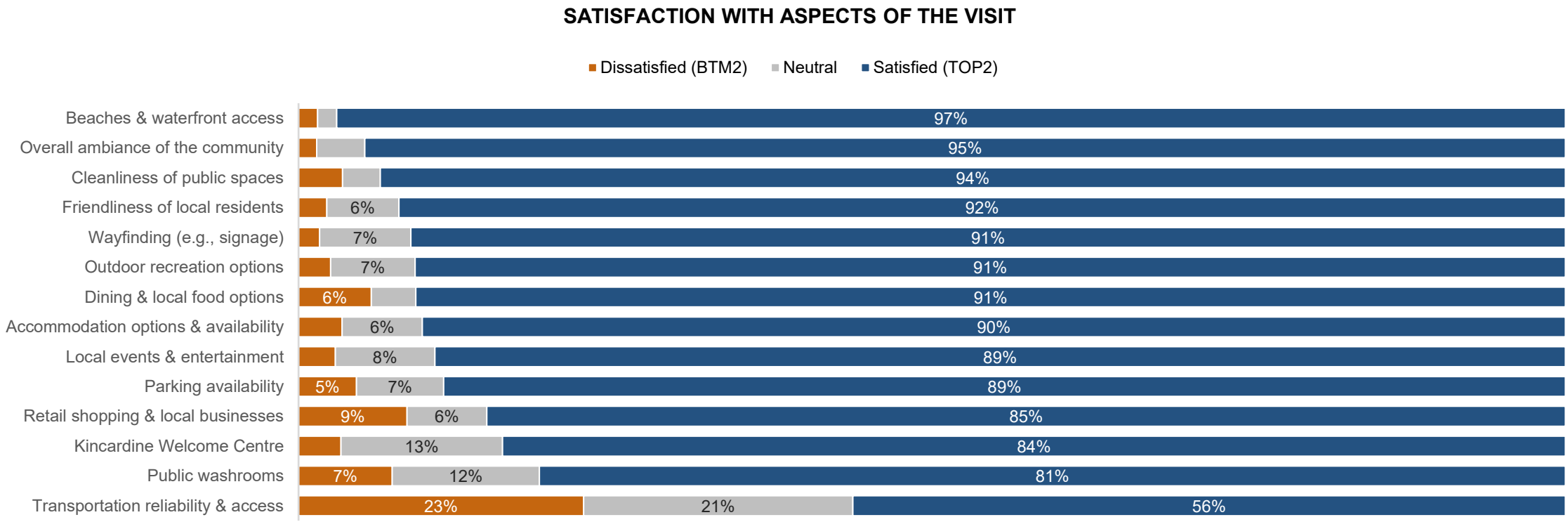
Base: all visitors, excluding don't know (n=423). Q12 Overall, how satisfied were you with your visit to the Municipality of Kincardine?

SATISFACTION WITH ASPECTS OF THE VISIT

All visitors | Segments are defined on slide 6

Visitors are highly satisfied with almost every aspect of their visit, led by the beach and the community's ambiance.

Satisfaction reaches 97% for beaches and waterfront access, 95% for the overall ambiance of the community and 94% for the cleanliness of public spaces, and is 85% or higher for 11 of the 14 aspects measured. Transportation reliability and access (56%) has the most room to improve, and is the only aspect where more than one in ten visitors (23%) are dissatisfied.



Base: visitors who rated each aspect, excluding don't know and not applicable (n=149–420). Q13 How satisfied were you with each of the following aspects of your visit to the Municipality of Kincardine?

SATISFACTION WITH ASPECTS OF THE VISIT – BY SEGMENT

All visitors | Segments are defined on slide 6

Overnight and occasional visitors rate most aspects of the visit more highly.

Overnight visitors are more satisfied than day-trippers with the community's ambiance (98% vs. 90%), cleanliness (97% vs. 89%), friendliness (96% vs. 86%), parking (94% vs. 82%) and retail (91% vs. 78%).

Occasional visitors are more satisfied than frequent visitors with dining (95% vs. 87%), retail (90% vs. 80%), parking (94% vs. 84%) and transportation (64% vs. 47%).

Summer visitors rate the friendliness of residents (94%) and outdoor recreation (93%) especially highly.

		TRIP TYPE		VISIT FREQUENCY		SEASON OF VISIT		
Satisfied (TOP2)	Overall	Day trip (n=161)	Overnight (n=238)	Occasional (n=204)	Frequent (n=190)	Spring (n=73)	Summer (n=287)	Fall (n=33)
Beaches & waterfront access	97%	95%	98%	98%	97%	96%	98%	97%
Overall ambiance of the community	95%	90% ▼	98% ▲	97% ▲	93%	92%	96%	94%
Cleanliness of public spaces	94%	89% ▼	97% ▲	95%	93%	94%	94%	91%
Friendliness of local residents	92%	86% ▼	96% ▲	94%	89%	84% ▼	94% ▲	94%
Wayfinding (e.g., signage)	91%	88%	93%	93%	90%	90%	92%	*96%*
Outdoor recreation options	91%	89%	92%	90%	91%	85%	93% ▲	*92%*
Dining & local food options	91%	86% ▼	94% ▲	95% ▲	87% ▼	92%	91%	97%
Accommodation options & availability	90%	–	90%	88%	94%	*92%*	90%	*87%*
Local events & entertainment	89%	85%	92%	90%	89%	86%	90%	*92%*
Parking availability	89%	82% ▼	94% ▲	94% ▲	84% ▼	88%	89%	90%
Retail shopping & local businesses	85%	78% ▼	91% ▲	90% ▲	80% ▼	86%	85%	88%
Kincardine Welcome Centre	84%	78%	88%	85%	83%	80%	86%	*80%*
Public washrooms	81%	77%	84%	82%	81%	75%	82%	*92%*
Transportation reliability & access	56%	47% ▼	63% ▲	64% ▲	47% ▼	*57%*	57%	*59%*

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

Base: visitors who rated each aspect, excluding don't know and not applicable (n=149–420). Q13 How satisfied were you with each of the following aspects of your visit? TOP2 = somewhat or very satisfied.



ADVOCACY & RETURN INTENT

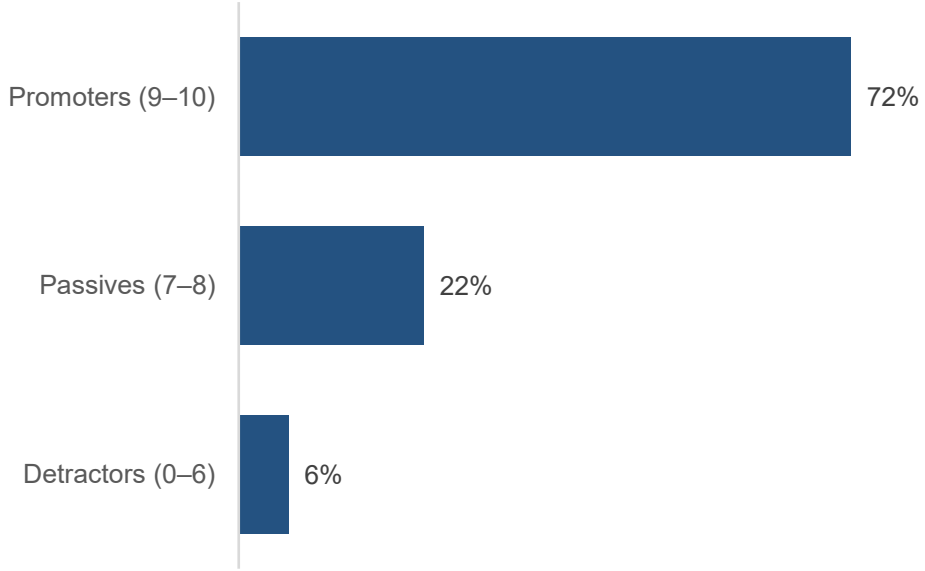
LIKELIHOOD TO RECOMMEND KINCARDINE

All visitors | Segments are defined on slide 6

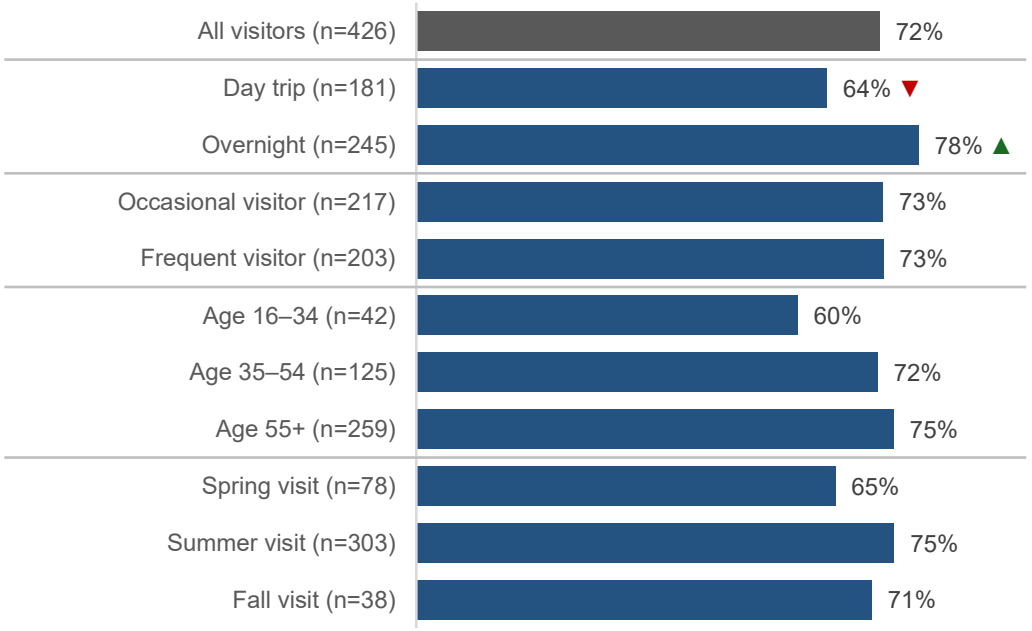
Seven in ten visitors are promoters, giving Kincardine a Net Promoter Score of +66.

Seventy-two percent are promoters (9–10 out of 10), 22% are passives and 6% are detractors. More than six in ten (61%) give the highest possible rating of 10. Overnight visitors are more likely to be promoters than day-trippers (78% vs. 64%), and promoters are consistent across age groups and visit frequency.

ALL VISITORS



PROMOTERS (9–10) BY SEGMENT



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

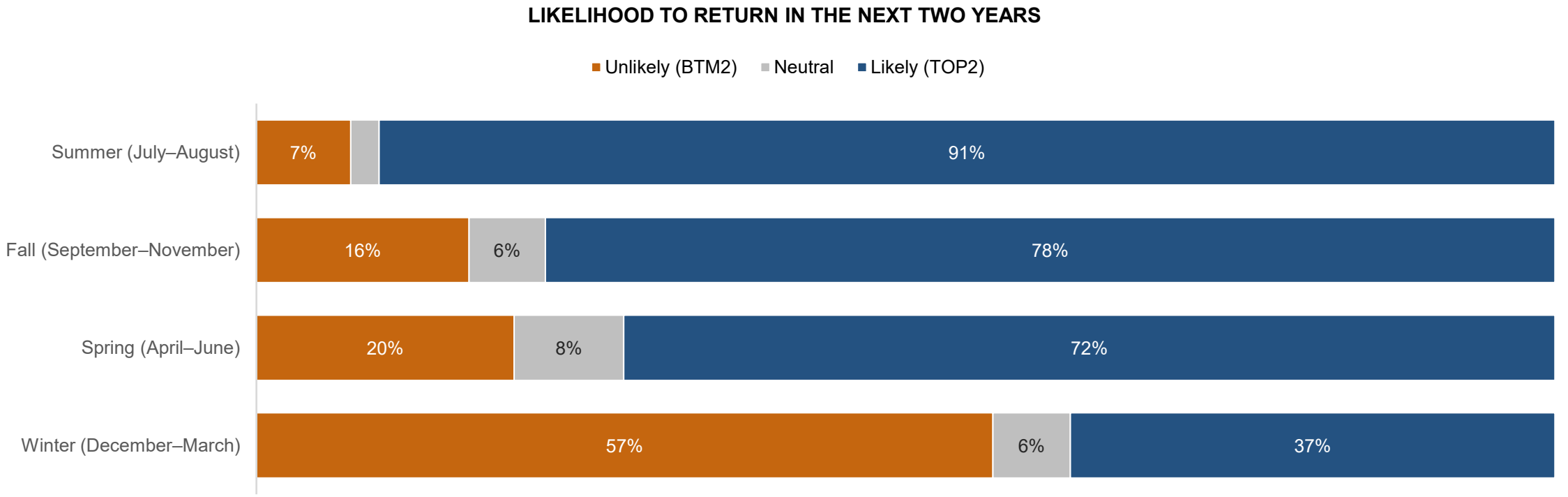
Base: all visitors (n=426). Q16 How likely are you to recommend the Municipality of Kincardine as a travel destination to friends or family? NPS = % promoters minus % detractors.

LIKELIHOOD TO RETURN BY SEASON

All visitors | Segments are defined on slide 6

Visitors are likely to return in every season except winter, pointing to clear shoulder-season potential.

Nine in ten (91%) are likely to return in summer within the next two years, and most are also likely to return in the fall (78%) and spring (72%), including 62% who are very likely to return in the fall. Winter return intent (37%) is lower but still represents more than one in three visitors.



Base: all visitors, excluding don't know (n=402–413). Q11 How likely are you to return to the Municipality of Kincardine in the next 2 years during…

LIKELIHOOD TO RETURN – BY SEGMENT

All visitors | Segments are defined on slide 6

Frequent visitors and day-trippers are the strongest prospects for off-season return.

Frequent visitors are more likely than occasional visitors to return in the fall (90% vs. 66%), spring (89% vs. 56%) and winter (63% vs. 12%).

Day-trippers are more likely than overnight visitors to return in the fall (85%), spring (80%) and winter (47%).

Return intent tends to follow the season of the last visit: fall visitors are more likely to return in the fall (94%) and spring visitors in the spring (87%).

		TRIP TYPE		VISIT FREQUENCY		SEASON OF VISIT		
Likely (TOP2)	Overall	Day trip (n=178)	Overnight (n=235)	Occasional (n=206)	Frequent (n=201)	Spring (n=74)	Summer (n=296)	Fall (n=37)
Summer (July–August)	91%	90%	91%	89%	93%	86%	93% ▲	81% ▼
Fall (September–November)	78%	85% ▲	72% ▼	66% ▼	91% ▲	72%	77%	94% ▲
Spring (April–June)	72%	80% ▲	66% ▼	56% ▼	89% ▲	87% ▲	68% ▼	67%
Winter (December–March)	37%	47% ▲	30% ▼	12% ▼	63% ▲	39%	39%	14% ▼

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

Base: all visitors, excluding don't know (n=402–413). Q11 How likely are you to return to the Municipality of Kincardine in the next 2 years during… TOP2 = somewhat or very likely.

WHAT WOULD MAKE A FALL OR WINTER VISIT MORE APPEALING

Visitors likely to return in fall, winter or spring | Segments are defined on slide 6

Events, value and indoor options would make fall and winter visits more appealing.

More events or festivals (32%) and lower prices or shoulder-season promotions (31%) lead, followed by indoor activities and attractions (27%), culinary and market events (26%), accommodation options (22%) and outdoor winter recreation (20%). A further 9% mention better weather or safer winter roads.

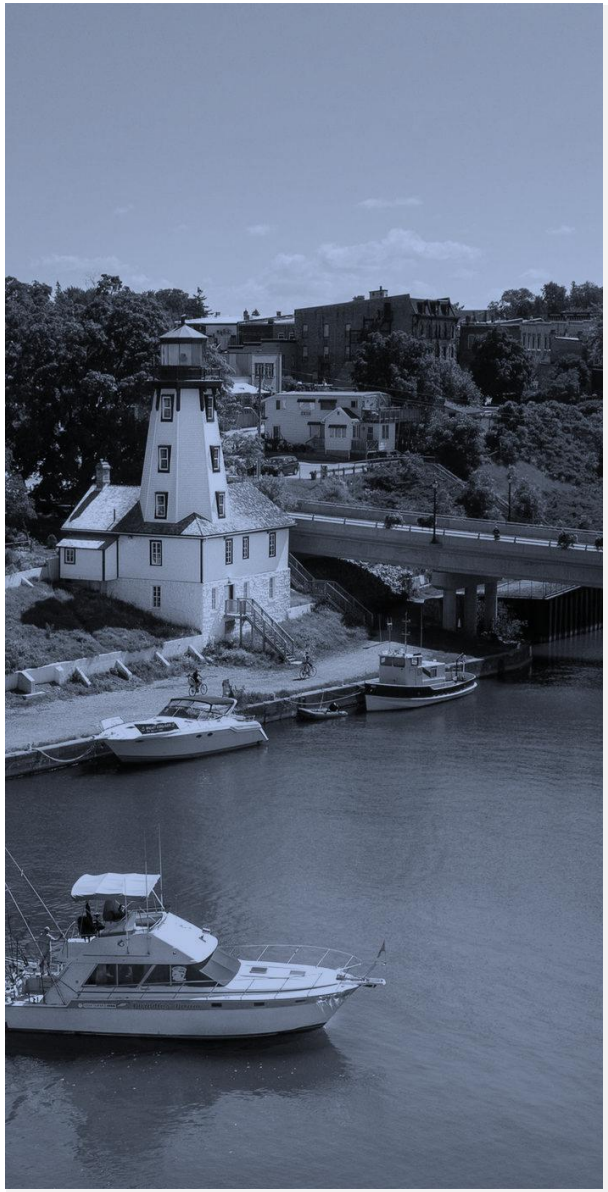
Visitors aged 16–34 show the broadest interest, including events (62%), outdoor winter recreation (59%) and indoor attractions (47%).

Occasional visitors place more weight on lower prices (38%) and accommodation (29%).

		AGE			VISIT FREQUENCY		TRIP TYPE	
Would make a visit more appealing	Overall (n=357)	16–34 (n=32)	35–54 (n=108)	55+ (n=217)	Occasional (n=160)	Frequent (n=194)	Day trip (n=161)	Overnight (n=196)
More events or festivals	32%	63% ▲	33%	26% ▼	30%	33%	32%	32%
Lower prices / shoulder-season promotions	31%	47% ▲	35%	26% ▼	38% ▲	26% ▼	30%	32%
More indoor activities and attractions	27%	47% ▲	32%	21% ▼	24%	29%	31%	23%
Culinary experiences & market events	26%	38%	26%	25%	24%	29%	30%	23%
Better / more affordable accommodation	22%	22%	26%	21%	29% ▲	17% ▼	23%	22%
Outdoor winter recreation	20%	59% ▲	28% ▲	11% ▼	17%	23%	20%	20%

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

Base: visitors likely to return in the fall, winter or spring who answered (n=357). Q11C What would make a fall or winter visit to Kincardine more appealing? Multiple responses allowed. Not sure (17%) and Other (17%) not shown.



SPENDING & VALUE

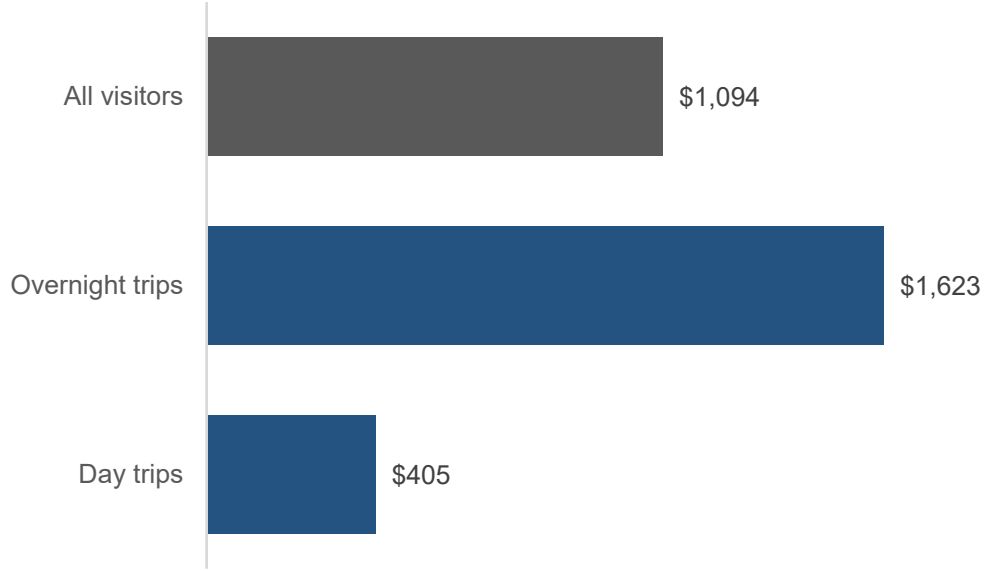
VISITOR SPENDING

Visitors who reported spending

Overnight trips generate four times the spending of day trips.

Travel parties spend an average of $1,094 per trip in Kincardine (median $563). Overnight parties spend $1,623 per trip, or $382 per night and $142 per person per night, compared with $405 for day-trip parties. Accommodation ($487) and restaurants, cafés, bars and breweries ($200) account for most spending, followed by groceries ($141).

AVERAGE SPEND PER TRAVEL PARTY, PER TRIP



AVERAGE SPEND PER TRAVEL PARTY BY CATEGORY (ALL TRIPS)



Base: visitors who reported at least one spending category (n=366; overnight n=207, day trips n=159). Q17 Approximately how much did your travel party spend in total during your visit? Blank categories count as $0; extreme outliers excluded as in the tables.

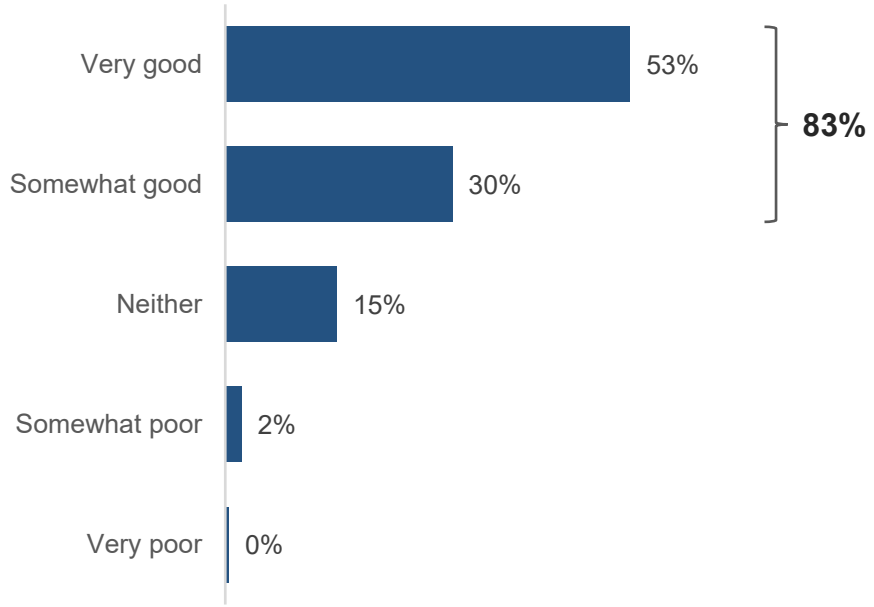
VALUE FOR MONEY

All visitors | Segments are defined on slide 6

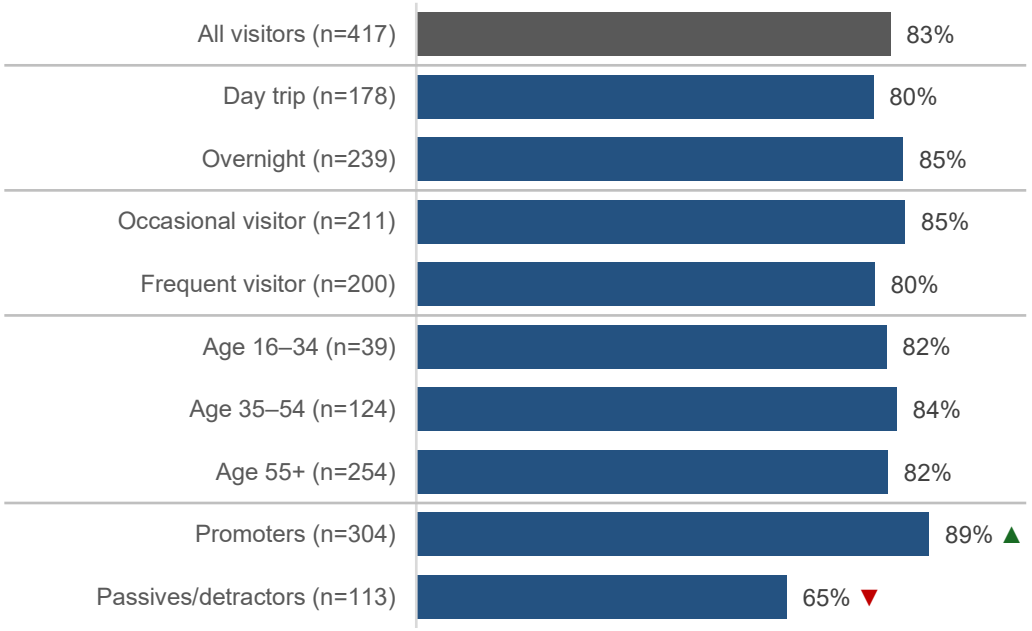
More than eight in ten visitors rate their visit as good value for money.

Eighty-three percent rate the value for money of their visit as good, including 53% who rate it very good, while 15% are neutral and 3% rate it poor. Value ratings are consistent across trip types, visit frequency and age groups, and highest among promoters (89%).

ALL VISITORS

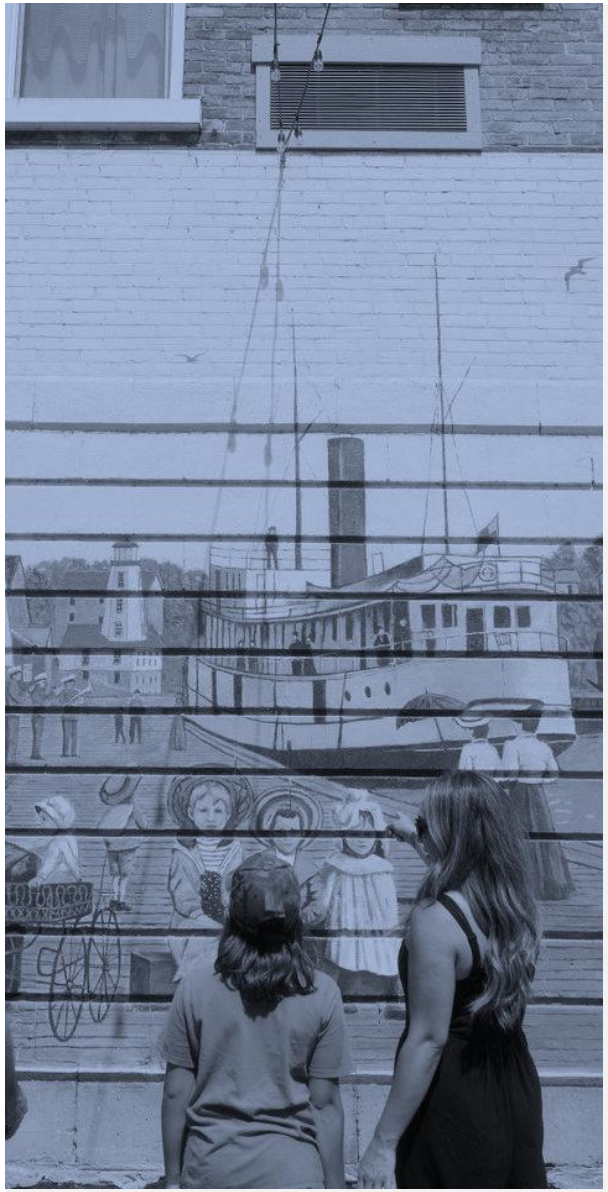


GOOD VALUE (TOP2) BY SEGMENT



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

Base: all visitors, excluding don't know (n=417). Q18 Overall, how would you rate the value for money of your visit to the Municipality of Kincardine?



DESTINATION IDENTITY & VISITOR INFORMATION

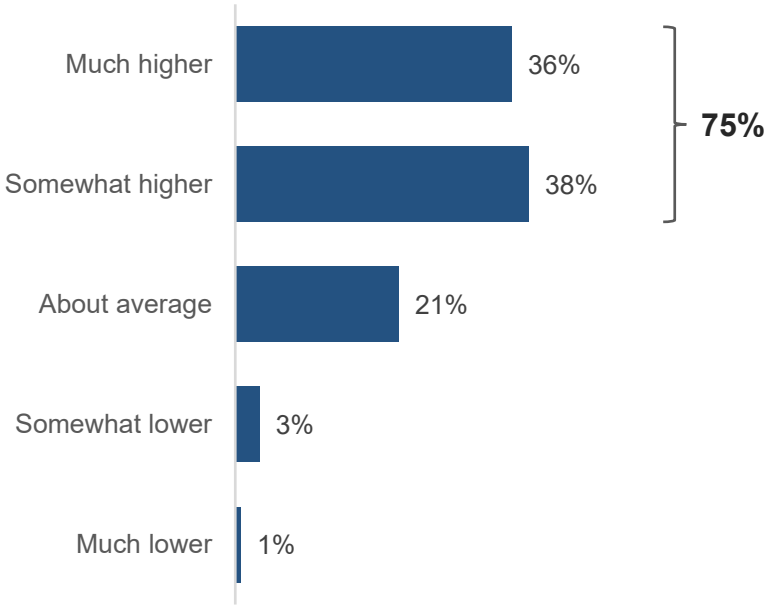
KINCARDINE COMPARED WITH OTHER DESTINATIONS

All visitors | Segments are defined on slide 6

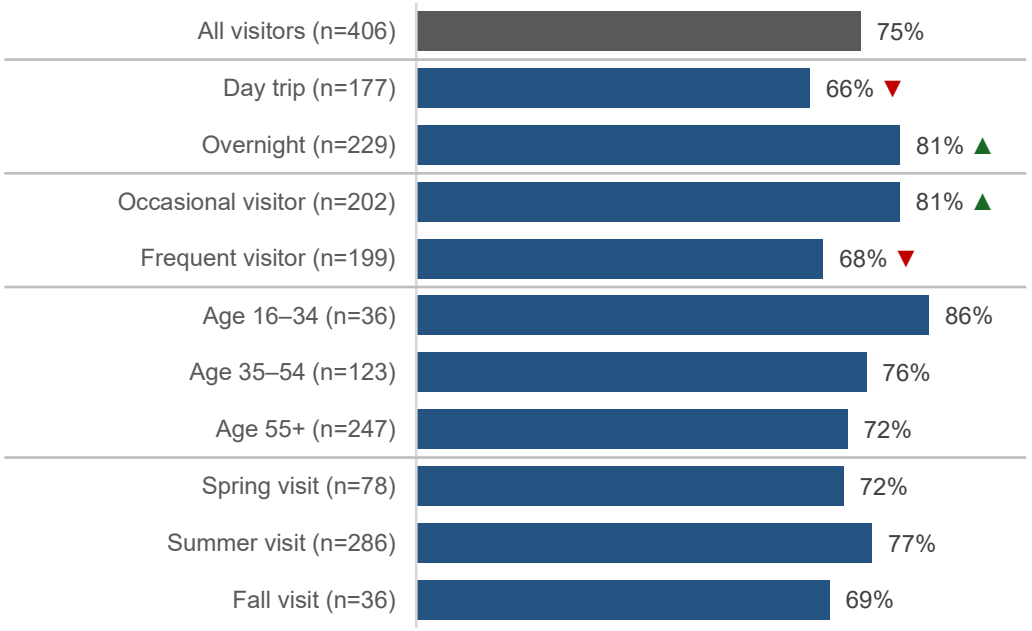
Three in four visitors rate Kincardine above other Ontario lakefront and rural destinations.

Seventy-five percent rate Kincardine higher than other Ontario lakefront or rural destinations they have visited, including 36% who rate it much higher, while 21% rate it about average and 4% lower. Overnight visitors (81%) and occasional visitors (81%) rate Kincardine most favourably.

ALL VISITORS



HIGHER THAN AVERAGE (TOP2) BY SEGMENT



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

Base: visitors who have visited other comparable destinations, excluding don't know (n=406). Q21 Compared to other Ontario lakefront or rural destinations you have visited, how would you rate the Municipality of Kincardine overall?

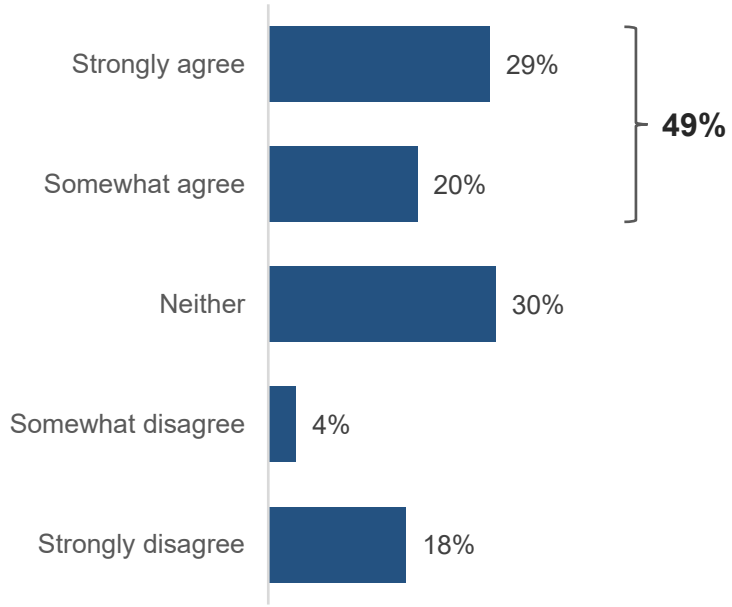
ROLE OF THE SCOTTISH-INFLUENCED TRADITIONS

All visitors | Segments are defined on slide 6

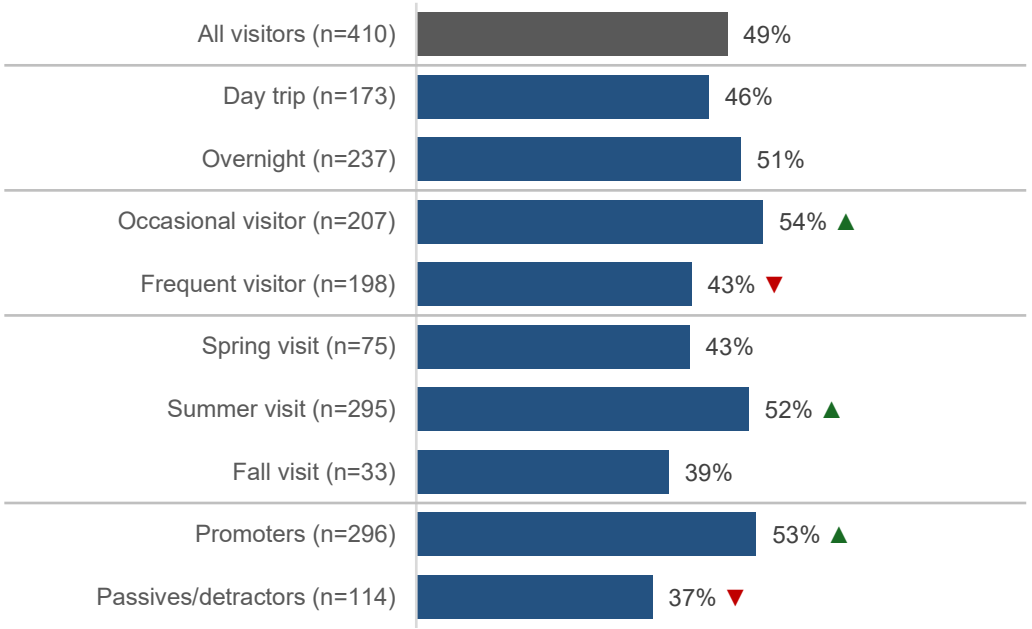
Half of visitors say Kincardine's Scottish-influenced traditions contributed to their decision to visit.

Forty-nine percent agree the Scottish-influenced cultural traditions contributed to their decision to visit, including 29% who strongly agree, while 30% are neutral. Agreement is higher among summer visitors (52%), occasional visitors (54%) and promoters (53%), confirming the traditions as a distinctive part of Kincardine's appeal.

ALL VISITORS



AGREE (TOP2) BY SEGMENT



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

Base: all visitors, excluding don't know (n=410). Q20 How much do you agree or disagree with the following statement? "Kincardine's Scottish-influenced cultural traditions contributed to my decision to visit."

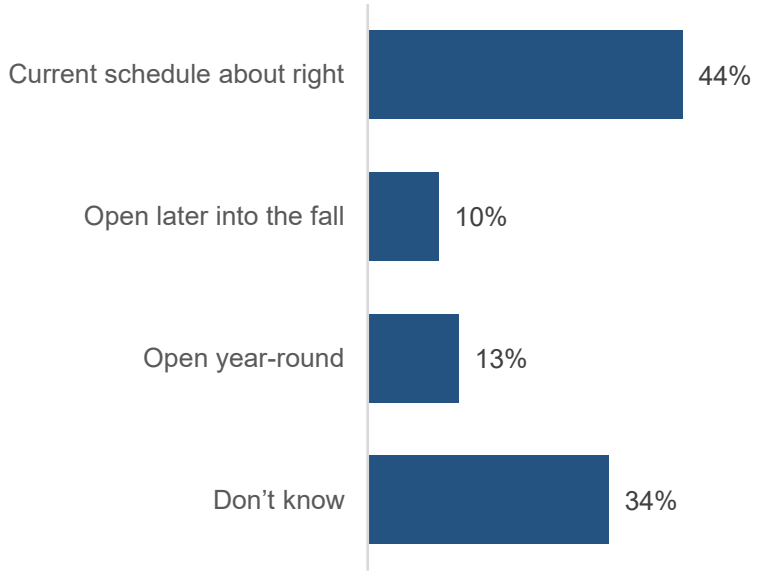
KINCARDINE WELCOME CENTRE SCHEDULE

All visitors | Segments are defined on slide 6

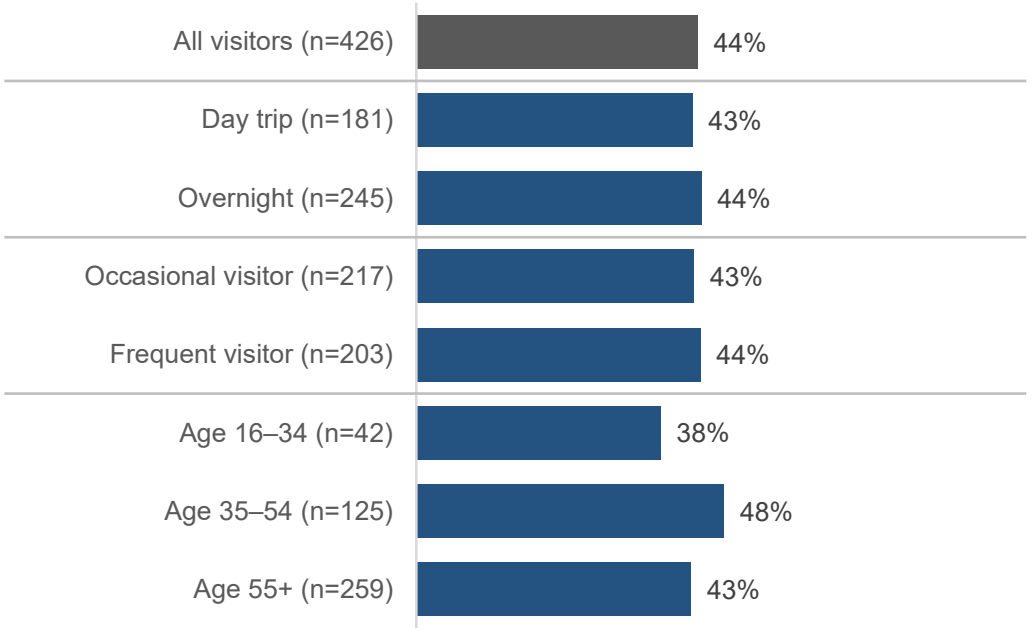
Most visitors with a view support the Welcome Centre's current schedule.

Forty-four percent say the current May to mid-October schedule is about right, 13% would like the Centre open year-round and 10% would extend it later into the fall, while one-third (34%) do not know. Among visitors with a view, two-thirds (66%) support the current schedule. Views are consistent across trip types, visit frequency and age groups.

ALL VISITORS



CURRENT SCHEDULE ABOUT RIGHT BY SEGMENT



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

Base: all visitors (n=426). Q16A The Kincardine Welcome Centre is currently open from May to mid-October. Which of the following best reflects your view?

PREFERRED VISITOR INFORMATION SERVICES

All visitors | Segments are defined on slide 6

Visitors want a mix of information channels rather than a single solution.

Preferences are spread evenly across a dedicated visitor centre building (30%), seasonal kiosks (29%), digital-only information (26%), mobile information at events (24%) and existing municipal facilities (23%), while 27% are not sure.

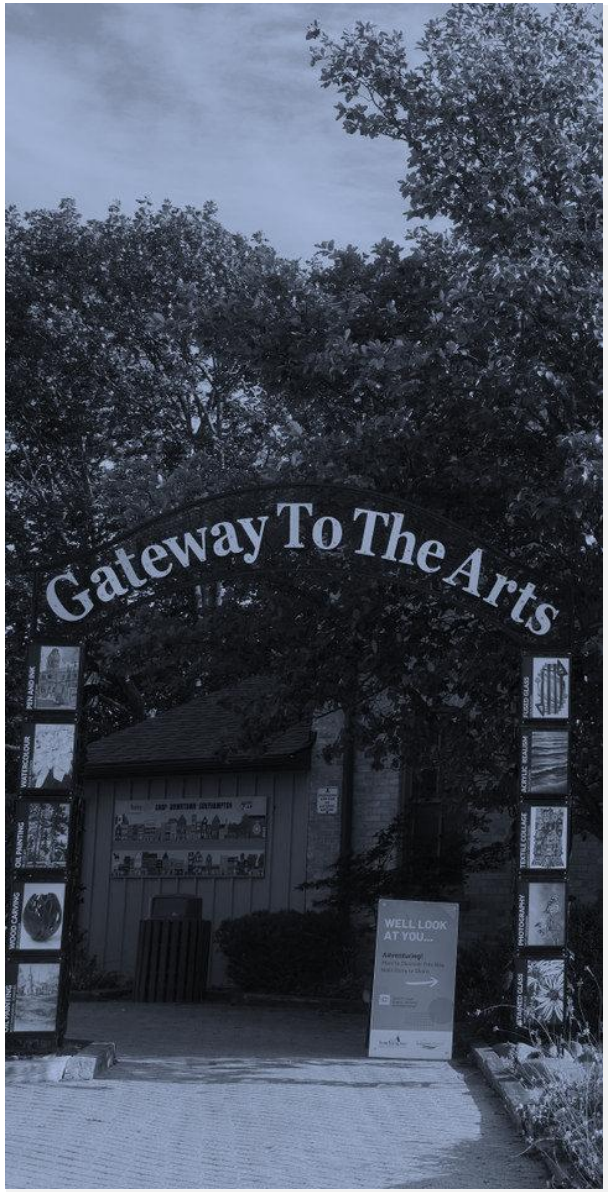
Day-trippers (36%) and spring visitors (40%) are more likely to prefer a dedicated building.

Visitors aged 35–54 are more likely to prefer digital-only information (34%).

		TRIP TYPE		AGE			SEASON OF VISIT		
Preferred service	Overall (n=426)	Day trip (n=181)	Overnight (n=245)	16–34 (n=42)	35–54 (n=125)	55+ (n=259)	Spring (n=78)	Summer (n=303)	Fall (n=38)
A dedicated visitor centre building	30%	36% ▲	26% ▼	31%	27%	32%	40% ▲	27% ▼	37%
Seasonal visitor kiosks	29%	30%	28%	21%	34%	28%	26%	29%	29%
Digital only (website, app)	26%	25%	27%	21%	34% ▲	22% ▼	22%	28%	16%
Mobile visitor information at events	24%	28%	21%	31%	29%	21% ▼	14% ▼	27%	24%
Through existing municipal facilities	23%	25%	22%	21%	22%	25%	21%	25%	16%

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

Base: all visitors (n=426). Q16B What type of visitor information service would you prefer in Kincardine? Multiple responses allowed. Not sure (27%) and Other (3%) not shown.



VISITOR VOICE

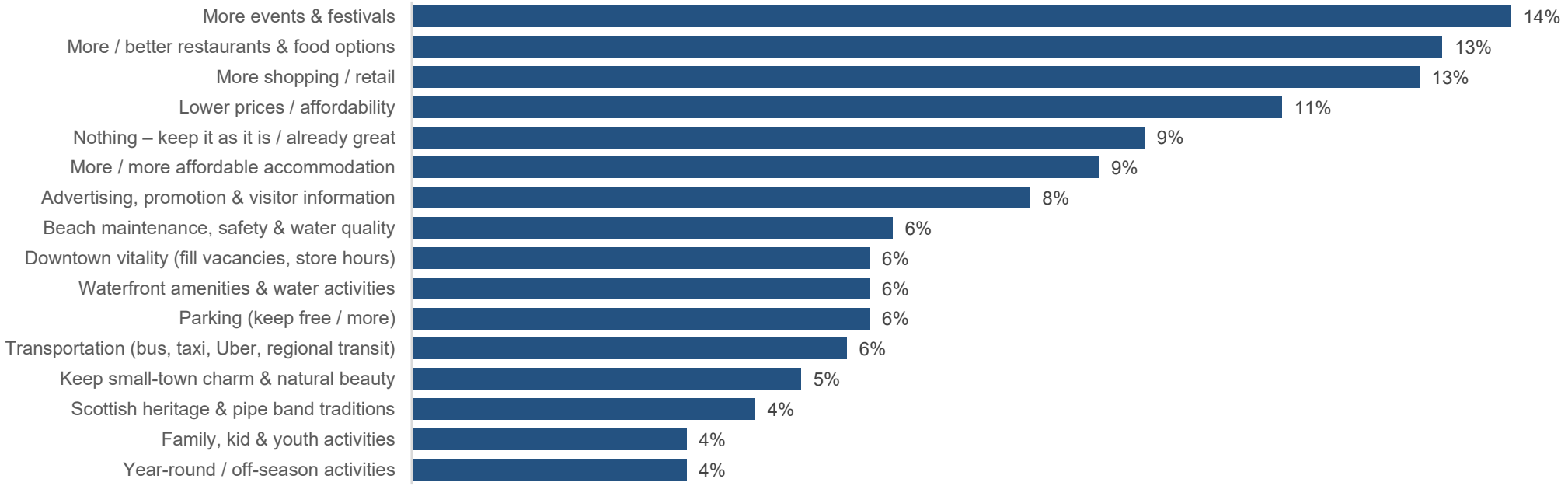
WHAT WOULD STRENGTHEN KINCARDINE'S APPEAL

Visitors who provided a suggestion

Visitors most want more to do, eat and buy, and one in ten would keep Kincardine just as it is.

Asked for the single most important thing that would strengthen Kincardine's appeal, visitors most often mention more events and festivals (14%), more or better restaurants and food options (13%), more shopping and retail (13%) and lower prices or affordability (11%). Nearly one in ten (9%) would not change anything, and others point to accommodation (9%), promotion and visitor information (8%), and the beach, downtown, waterfront amenities and free parking (6% each).

MOST COMMON SUGGESTIONS



Base: visitors who provided a response (n=341). Q22 What is the single most important thing that would strengthen the Municipality of Kincardine's appeal as a travel destination? Coded open-ended responses; multiple mentions allowed. Top 16 themes shown.

WHAT WOULD STRENGTHEN KINCARDINE'S APPEAL – BY SEGMENT

Visitors who provided a suggestion | Segments are defined on slide 6

Frequent visitors focus on shopping and dining, while occasional visitors are more likely to be content as it is.

Frequent visitors are more likely to ask for more shopping (19%) and restaurants (18%), reflecting their deeper familiarity with what the town offers.

Occasional visitors (14%) and promoters (12%) are more likely to say Kincardine needs nothing more.

Suggestions are broadly similar for day-trippers and overnight visitors.

		TRIP TYPE		VISIT FREQUENCY		NPS GROUP	
Theme	Overall (n=341)	Day trip (n=148)	Overnight (n=193)	Occasional (n=161)	Frequent (n=175)	Promoters (n=252)	Passives/ detractors (n=89)
More events & festivals	14%	13%	15%	17%	12%	14%	15%
More / better restaurants & food options	13%	16%	11%	9% ▼	18% ▲	12%	16%
More shopping / retail	13%	14%	12%	6% ▼	19% ▲	12%	15%
Lower prices / affordability	11%	13%	10%	9%	14%	10%	13%
Nothing – keep it as it is / already great	9%	7%	11%	14% ▲	6% ▼	12% ▲	2% ▼
More / more affordable accommodation	9%	7%	10%	12%	6%	9%	9%
Advertising, promotion & visitor information	8%	8%	8%	9%	6%	8%	7%
Beach maintenance, safety & water quality	6%	5%	7%	7%	6%	6%	7%
Downtown vitality (fill vacancies, store hours)	6%	5%	6%	4%	8%	6%	6%
Waterfront amenities & water activities	6%	7%	5%	4%	7%	5%	8%

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

Base: visitors who provided a response (n=341). Q22 What is the single most important thing that would strengthen Kincardine's appeal as a travel destination? Coded open-ended responses. Top 10 themes shown.



IN THEIR OWN WORDS…

Visitors love Kincardine as it is, and want more reasons to stay longer and come back in other seasons.

Keep what makes it special

"Keeping the small town atmosphere that you have. Coming from a city, the small town has been the appeal for over 20 years that we have been coming to Kincardine."

Events as the gateway

"Festivals and events create the initial reason to visit, introducing the additional tourism assets that will bring people back for a return visit."

Beyond summer

"More fall and winter activities, keeping the parade through fall into September."

Dining and shopping

"More restaurants with patio/view of the lake that are a bit more affordable or suited towards families."

Downtown hours

"The Saturday night Pipe Band March & concert draws many people to the downtown area and yet the local businesses remain closed each and every Saturday night."

Getting there

"Regional transportation to and from the community as Kincardine is a beautiful yet inaccessible community."

Scottish heritage

"More of the Scottish influence would be nice, like restaurants that serve Scottish food, a Scottish & Canadian boutique."