CONTEXT IS EVERYTHING

KINCARDINE TOURISM STRATEGY – BUSINESS 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 Business Survey, which captures how tourism shapes local businesses: their reliance on visitors, the seasonal patterns and workforce pressures they manage, the infrastructure their customers rely on, and the support they need to grow.

Objectives:
The objectives of this survey are to evaluate:

- The profile of participating businesses and their reliance on visitor and transient-worker revenue
- Peak-season capacity, off-season challenges and the value of spreading visitation through the year
- Workforce and labour challenges, including staff recruitment and housing
- The role of public infrastructure, parking and visitor services in the customer experience
- The types of tourism growth that would most benefit businesses
- Perceptions of municipal support for tourism businesses and priorities for the Tourism Strategy



METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview), open-link survey

Qualifying Criteria:
- Owns or operates a business or organization in the Municipality of Kincardine

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

Total Sample:
- Businesses: n=32

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

Median Length of Interview:
- 9.8 minutes



METHODOLOGY

Sample Size and Interpretation:
With 32 participating businesses, results are indicative rather than statistically representative of all Kincardine businesses.

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%.

Weighting:
Results are unweighted.



DEFINITIONS

Business: Owns or operates a business or organization in the Municipality of Kincardine (SC1).

TOP2: The combined percentage selecting the two most positive or highest responses on a five-point scale (e.g., somewhat and strongly agree; somewhat and very challenging).

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

ALIGNMENT WITH THE WEALTH & WELLBEING INDEX – BUSINESSES

Methodology | Business scorecard

The business scorecard is built to connect with the Economy side of Destination Canada's Wealth & Wellbeing Index, with links to Enablement and Experience.

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

Peak capacity, the off-season and demand for more even visitation are local proxies for tourism yield; views on municipal support stand in for tourism investment.

Staff housing aligns with the Index's quality-of-life measures.

Reliance on visitor revenue and seasonal staff recruitment also map to the Index and are reported elsewhere in the report.

Index sub-index	Index category	Kincardine business indicator
Economy	Tourism Yield	Operate at or near full capacity in peak season
	Tourism Yield	Find the off-season challenging
	Tourism Yield	Would benefit from more even visitation
	Tourism Yield	Want more shoulder / off-season programming
	Tourism Investment	Municipality supports tourism businesses well
	Tourism Investment	Aware of tourism support and programs
Enablement	Quality of Life	Staff housing is a barrier to recruitment
Experience	Place Brand	Municipality should invest more in marketing

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



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – THE BUSINESS PERSPECTIVE

ALL BUSINESSES

Tourism matters to a broad cross-section of Kincardine businesses. Participating businesses span retail (25%), professional and personal services (25%), food and beverage (19%), and accommodation, arts and recreation, and nearly all (94%) operate year-round. Close to half (44%) earn 25% or more of their revenue from visitors, and six in ten (62%) serve transient workers such as Bruce Power contractors. (See slides 13, 14)

Summer is busy, and the off-season is challenging for four in ten businesses. Two-thirds (66%) operate at or near full capacity in the peak season. Four in ten (41%) find the off-season challenging; reduced visitor revenue (85%) and a limited local customer base (69%) are the main challenges. Nearly half (47%) would benefit from a more even spread of visitors through the year. (See slides 16, 17, 18)

Staff housing is the leading workforce issue. Three in four businesses (76%) agree the availability of affordable staff housing is a barrier to recruiting and retaining employees, and half of those that hire seasonal staff (53%) find recruiting and retaining them challenging. (See slide 20)



EXECUTIVE SUMMARY – INFRASTRUCTURE, GROWTH AND SUPPORT

ALL BUSINESSES

Businesses rate public spaces well and see parking and wayfinding as the priorities. Eight in ten (81%) agree the Municipality maintains public spaces to a standard that supports a positive visitor experience, and 74% that public infrastructure reflects positively on Kincardine. Six in ten (59%) say parking availability affects their customers' access, and parking (43%) and signage from Highway 21 to downtown (22%) lead the improvements businesses suggest. (See slides 22, 23)

Shoulder-season programming is the growth businesses want most. Seven in ten (69%) say more shoulder and off-season visitor programming would benefit their business, ahead of better marketing, wayfinding and complementary new businesses (44% each), events and festivals (41%) and sports tournaments (41%). (See slide 26)

Businesses view the Municipality's support positively and want more promotion. Seven in ten (72%) agree the Municipality does a good job of supporting tourism businesses, and 62% are aware of the programs available. Half (53%) want more investment in marketing Kincardine, and marketing and promotion (28%) is the most common single priority businesses name for the Municipality. (See slides 27, 28)

BUSINESS SCORECARD

All businesses

Eight indicators set a baseline for the business perspective on tourism as the Tourism Strategy is implemented.

Staff housing as a recruitment barrier (76%), municipal support for tourism businesses (72%) and demand for more shoulder and off-season programming (69%) are the most widely shared views.

Two-thirds (66%) operate at or near full capacity in the peak season, and four in ten (41%) find the off-season challenging.

Six in ten (62%) are aware of the tourism support and programs available, and half (53%) want more investment in marketing Kincardine.

Indicator	Overall (n=32)
Operate at or near full capacity in peak season	66%
Find the off-season challenging	41%
Would benefit from more even visitation	47%
Want more shoulder / off-season programming	69%
Municipality supports tourism businesses well	72%
Aware of tourism support and programs	62%
Staff housing is a barrier to recruitment	76%
Municipality should invest more in marketing	53%

Base: all businesses, excluding don't know and not applicable (n=29–32). Q5, Q6, Q7, Q9, Q13, Q14. Results are indicative (n=32).



BUSINESS PROFILE

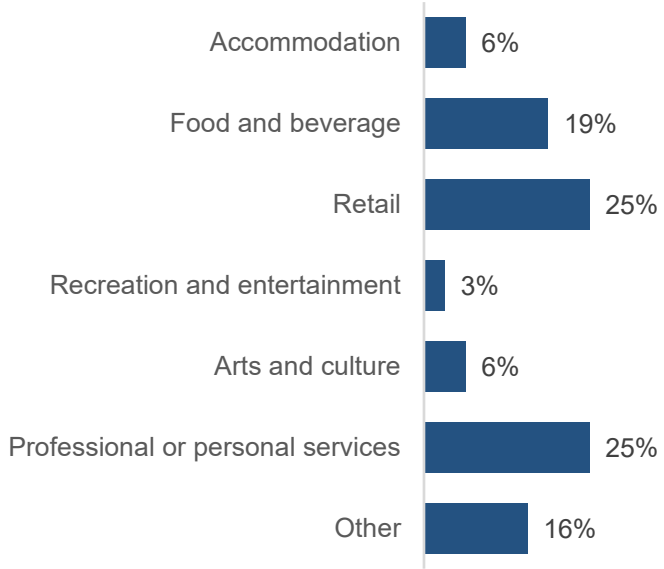
BUSINESS SECTOR AND YEARS OPERATING

All businesses

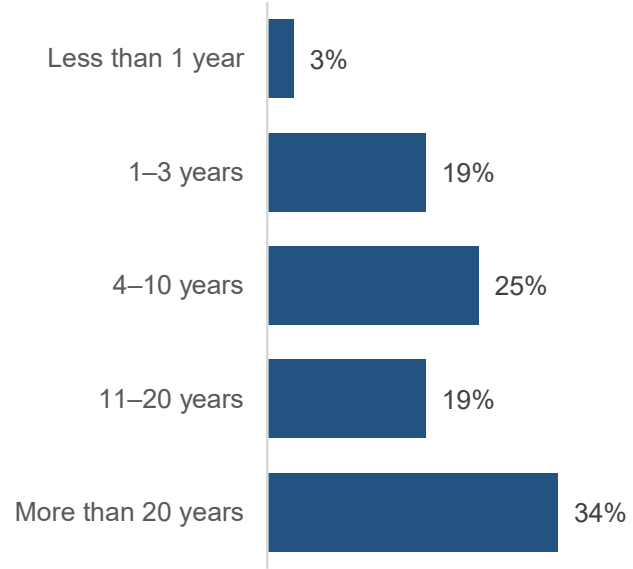
Participating businesses represent a broad mix of sectors, and most are well established.

Retail (25%) and professional or personal services (25%) are the largest groups, followed by food and beverage (19%), accommodation (6%), arts and culture (6%) and recreation and entertainment (3%). Just over half (53%) have operated in Kincardine for more than 10 years, including one-third (34%) for more than 20 years, while 22% have opened in the past three years.

BUSINESS SECTOR



YEARS OPERATING IN KINCARDINE



Base: all businesses (n=32). SC2 Which of the following best describes your business or organization? Q1 How many years has your business been operating in the Municipality of Kincardine?

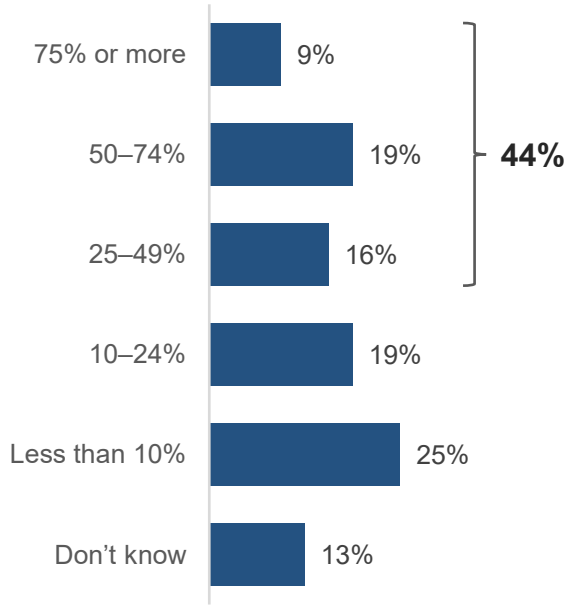
RELIANCE ON VISITORS AND TRANSIENT WORKERS

All businesses

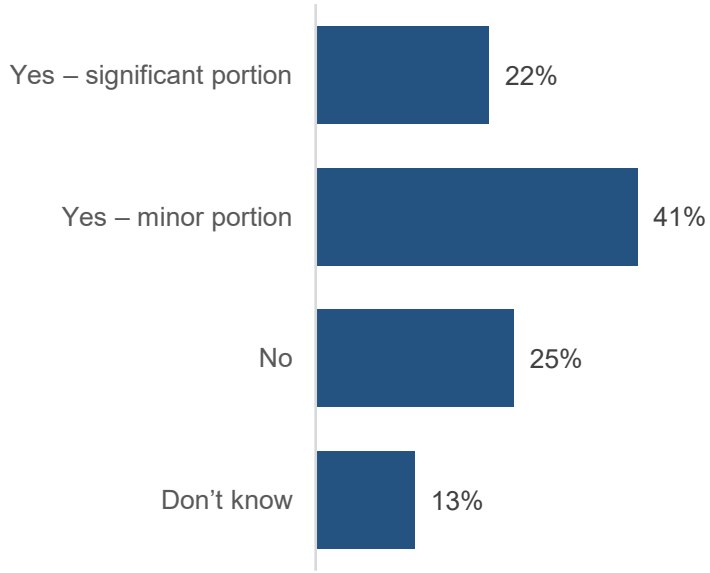
Visitors are an important source of revenue for close to half of businesses, and transient workers for most.

Forty-four percent of businesses earn 25% or more of their annual revenue from tourists or visitors, including 28% that earn half or more, while 44% earn less than 25% and 12% are unsure. Six in ten (62%) serve transient workers or contractors such as Bruce Power employees, including 22% for whom they are a significant portion of revenue. Nearly all businesses (94%) operate year-round.

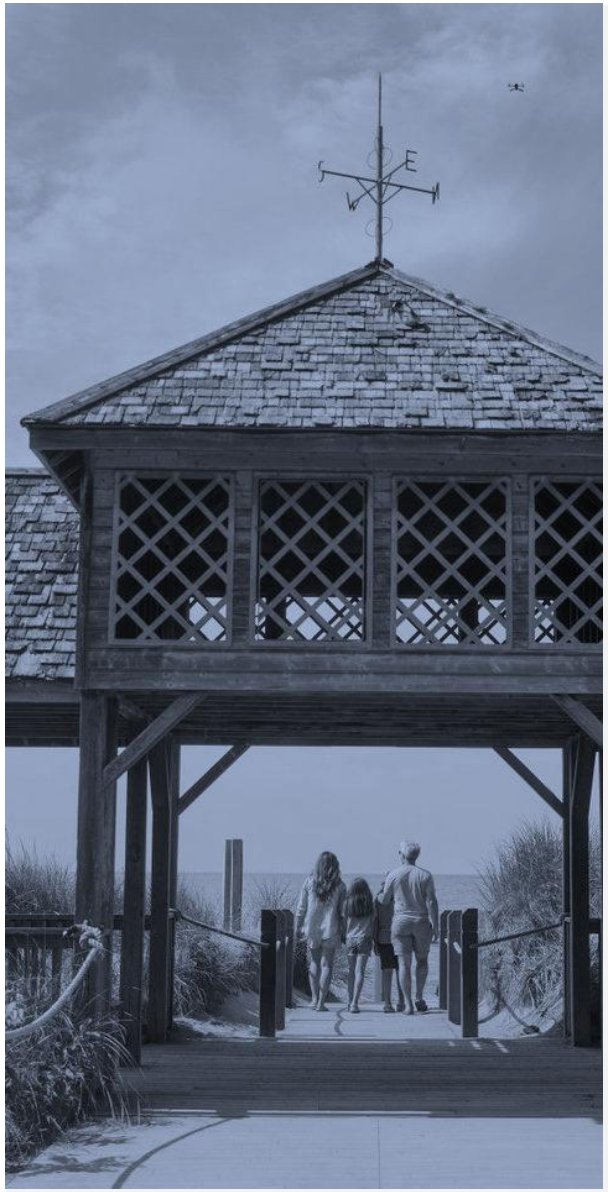
SHARE OF ANNUAL REVENUE FROM VISITORS



SERVE TRANSIENT WORKERS OR CONTRACTORS



Base: all businesses (n=32). Q3 Approximately what proportion of your business’s annual revenue comes from tourists or visitors rather than local year-round residents? Q4 Does your business serve transient workers or contractors (e.g., Bruce Power employees or construction workers) as a meaningful part of your customer base?



SEASONALITY & CAPACITY

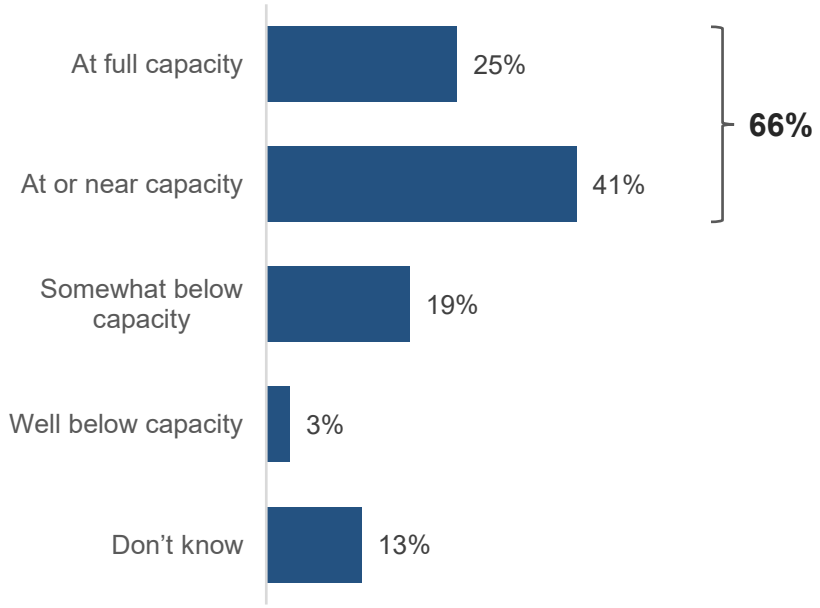
PEAK-SEASON CAPACITY AND THE OFF-SEASON

All businesses

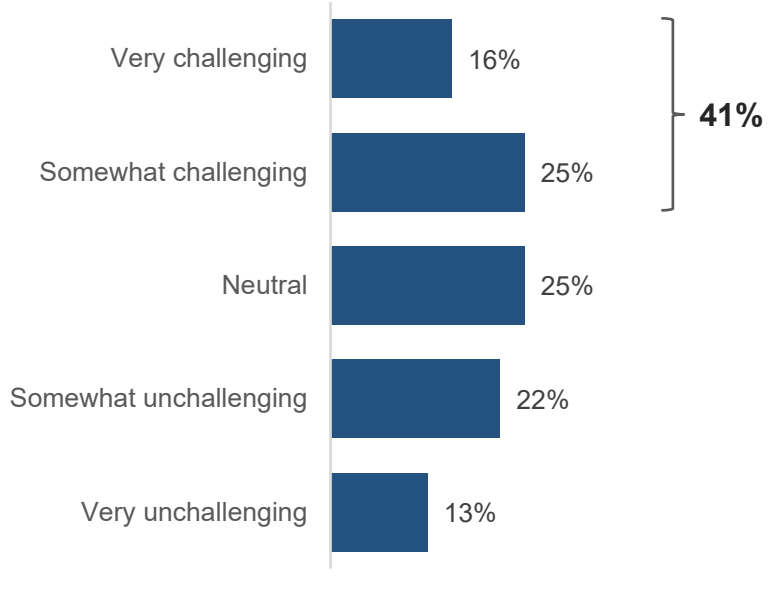
Two-thirds of businesses operate at or near full capacity in the peak season, and four in ten find the off-season challenging.

One in four (25%) operate at full capacity in the peak visitor season and 41% at or near capacity, while 22% operate below capacity. Off-season experiences vary widely: 41% find operating in the off-season challenging, 34% do not and 25% are neutral.

CAPACITY IN PEAK VISITOR SEASON



CHALLENGE OF OPERATING IN THE OFF-SEASON



Base: all businesses (n=32). Q5 How close to full capacity does your business operate during peak visitor season? Q6 How challenging is it for your business to operate during the off-season?

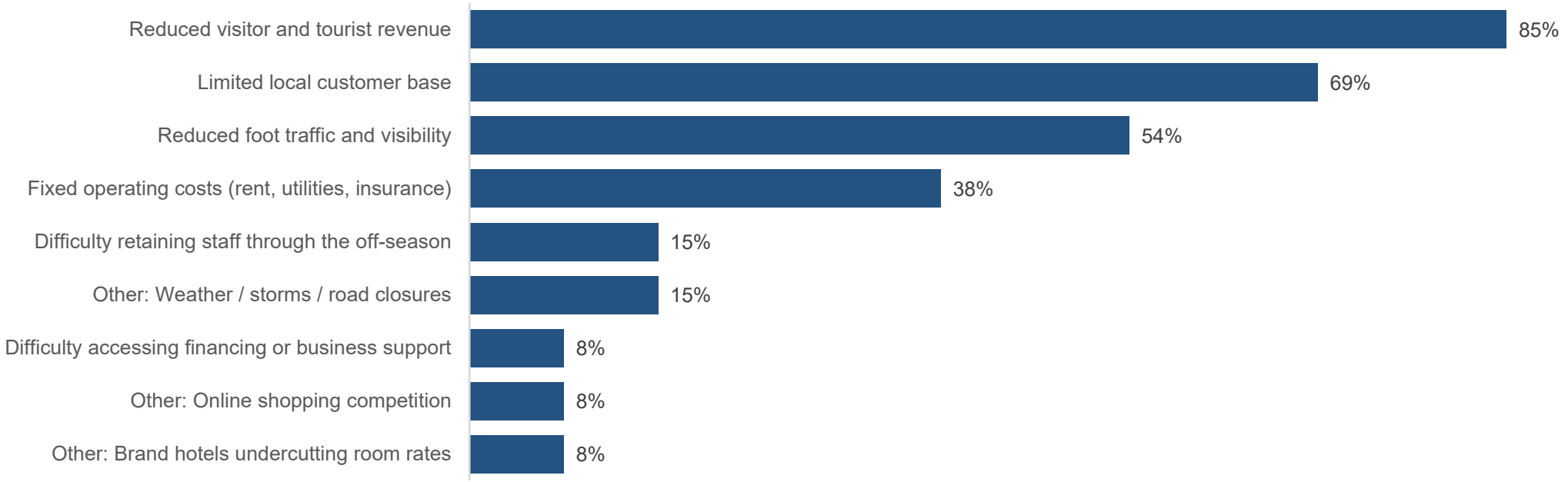
MAIN OFF-SEASON CHALLENGES

Businesses that find the off-season challenging

Lower visitor revenue and a limited local customer base are the main off-season challenges.

Among businesses that find the off-season challenging, most point to reduced visitor and tourist revenue (85%) and a limited local customer base (69%), and half to reduced foot traffic and visibility (54%). Fixed operating costs (38%) follow, while weather and winter road closures (15%) are the most common additional challenge raised.

MAIN CHALLENGES IN THE OFF-SEASON



Base: businesses that find the off-season challenging (n=13). Q6A What are the main challenges your business faces in the off-season? Multiple responses allowed. Small base; interpret with caution.

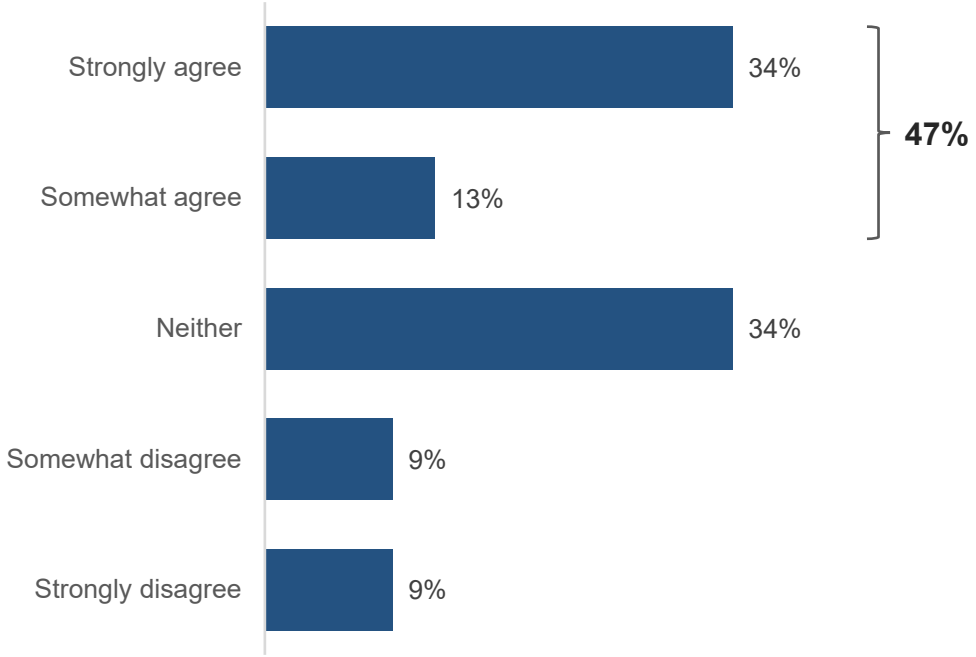
SPREADING VISITATION THROUGH THE YEAR

All businesses

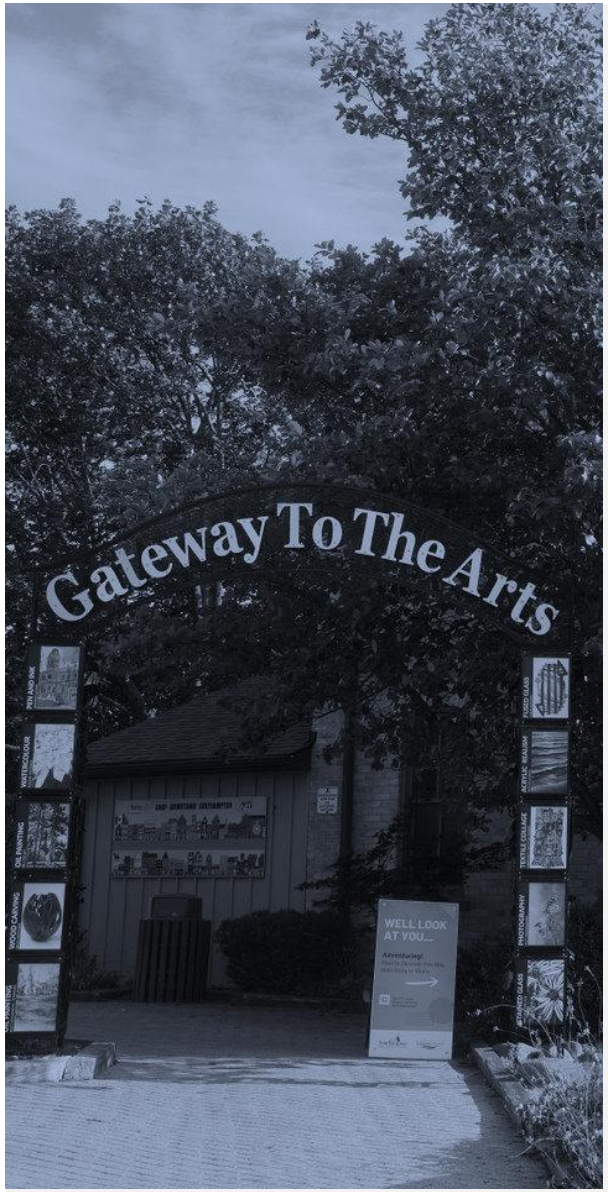
Nearly half of businesses would benefit from a more even spread of visitors through the year.

Forty-seven percent agree their business would benefit from a more even distribution of visitors throughout the year, including 34% who strongly agree, while 34% are neutral and 19% disagree.

"MY BUSINESS WOULD BENEFIT FROM A MORE EVEN DISTRIBUTION OF VISITORS THROUGHOUT THE YEAR"



Base: all businesses (n=32). Q7 How much do you agree or disagree with the following statement? "My business would benefit from a more even distribution of visitors throughout the year rather than a concentration in the summer months."



WORKFORCE

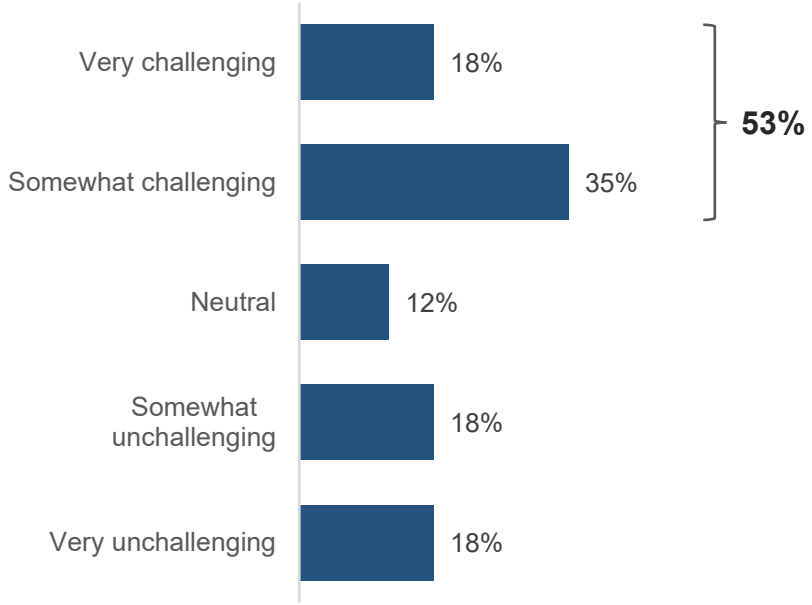
STAFF RECRUITMENT AND HOUSING

Businesses that hire seasonal staff / all businesses

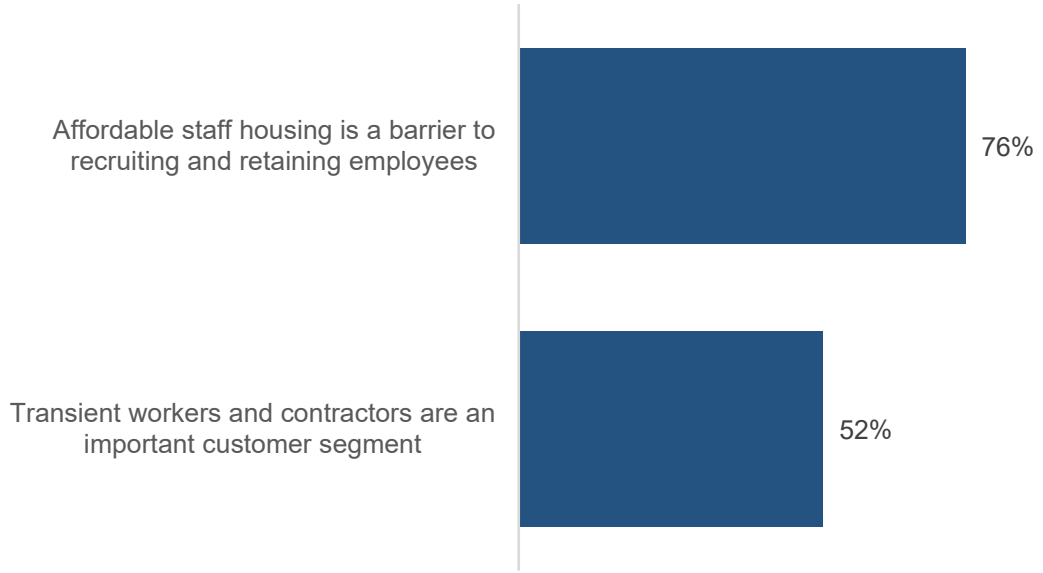
Affordable staff housing is the leading workforce barrier for businesses.

Three in four businesses (76%) agree the availability of affordable staff housing is a barrier to recruiting and retaining employees, including 38% who strongly agree. Among businesses that hire seasonal staff, 53% find recruiting and retaining them challenging and 35% do not. Half of businesses (52%) also agree transient workers and contractors are an important customer segment.

CHALLENGE OF RECRUITING AND RETAINING SEASONAL STAFF



AGREE (TOP2) WITH WORKFORCE STATEMENTS



Base: businesses that hire seasonal staff (n=17); all businesses, excluding don't know (n=29). Q8 How challenging is it for your business to recruit and retain seasonal staff?
Q9 To what extent do you agree or disagree with the following statements about workforce and labour?



INFRASTRUCTURE & VISITOR SERVICES

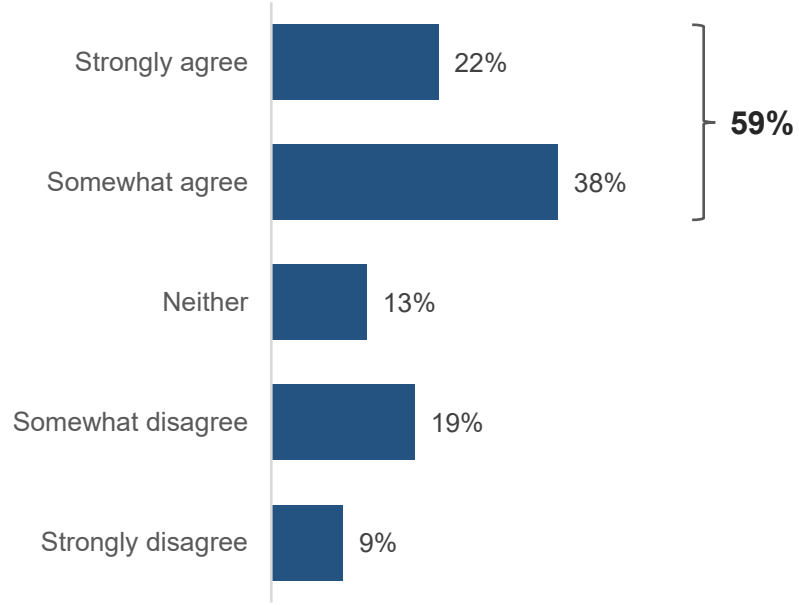
PARKING AND INFRASTRUCTURE PRIORITIES

All businesses

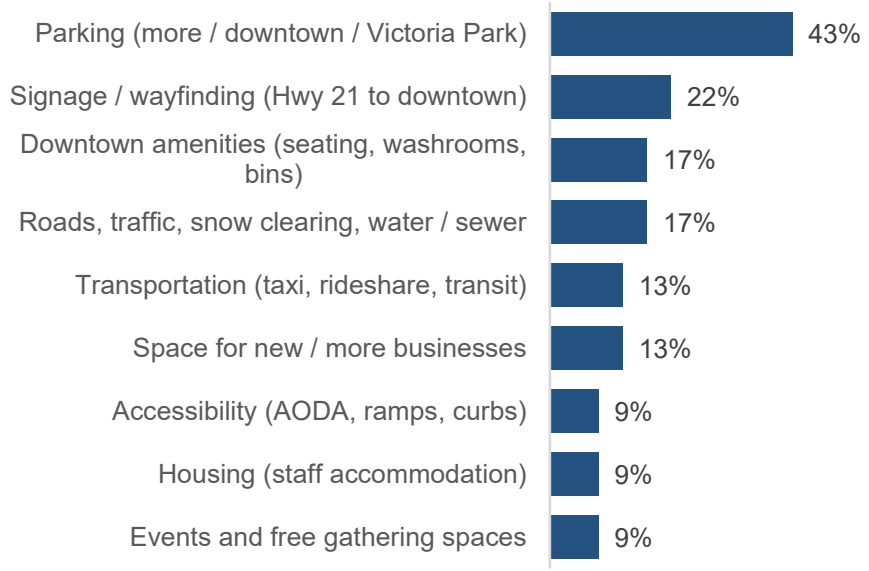
Parking is the infrastructure priority for businesses, followed by wayfinding.

Six in ten businesses (59%) agree parking availability affects their customers' ability to access their business, including 22% who strongly agree, while 28% disagree. Asked which infrastructure improvements would most benefit their business or customers, businesses most often mention parking (43%), followed by signage and wayfinding from Highway 21 to downtown (22%), downtown amenities such as seating, washrooms and bins (17%), and roads, snow clearing and servicing capacity (17%).

"PARKING AVAILABILITY AFFECTS MY CUSTOMERS' ABILITY TO ACCESS MY BUSINESS"



INFRASTRUCTURE IMPROVEMENTS THAT WOULD MOST BENEFIT BUSINESSES



Base: all businesses (n=32); businesses that suggested an improvement (n=23). Q10 "The parking availability in the Municipality of Kincardine affects my customers' ability to access my business." Q12 What specific infrastructure improvements would most benefit your business or your customers? Coded open-ended responses; multiple mentions allowed.

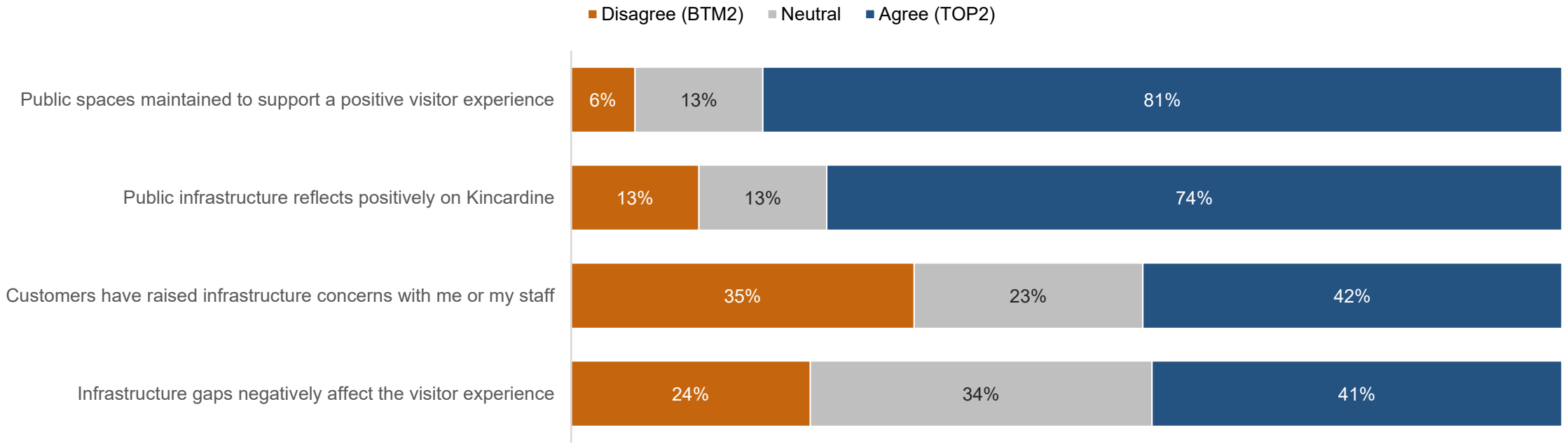
PUBLIC INFRASTRUCTURE

All businesses

Businesses rate the upkeep of public spaces and infrastructure highly.

Eight in ten (81%) agree the Municipality maintains public spaces to a standard that supports a positive visitor experience, and 74% that the quality of public infrastructure such as washrooms, cleanliness and signage reflects positively on Kincardine. Around four in ten say customers have raised infrastructure concerns with them (42%) or that infrastructure gaps affect the visitor experience (41%), with many neutral on both.

AGREEMENT WITH STATEMENTS ABOUT PUBLIC INFRASTRUCTURE



Base: all businesses, excluding don't know and not applicable (n=26–31). Q11 To what extent do you agree or disagree with the following statements about public infrastructure in the Municipality of Kincardine?

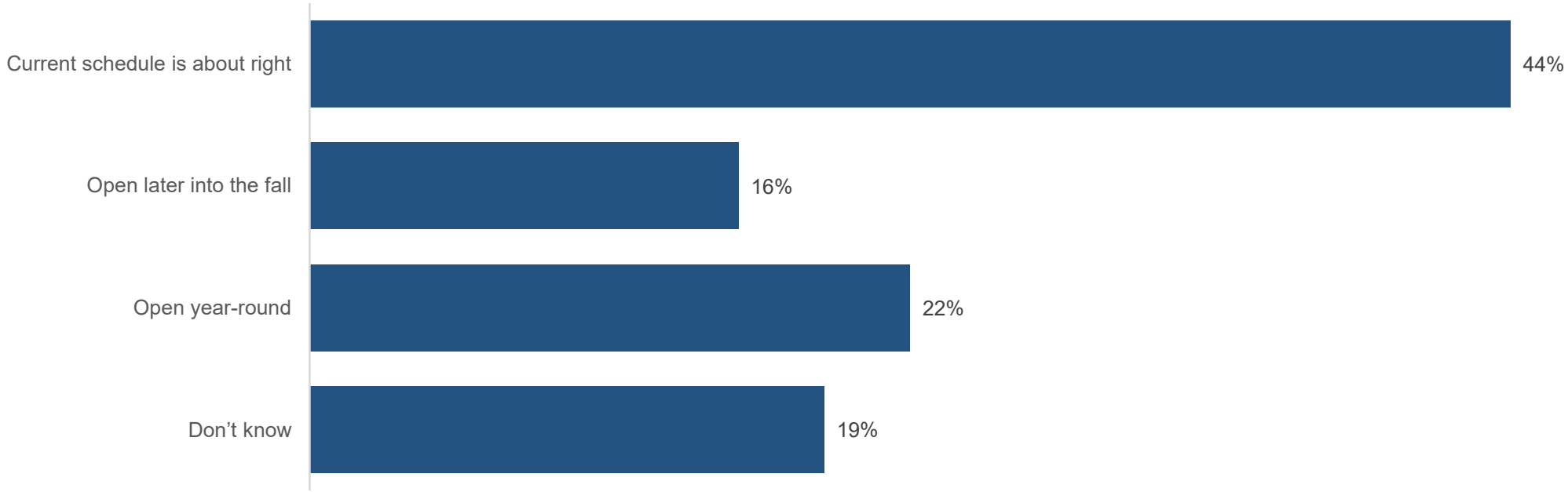
KINCARDINE WELCOME CENTRE SCHEDULE

All businesses

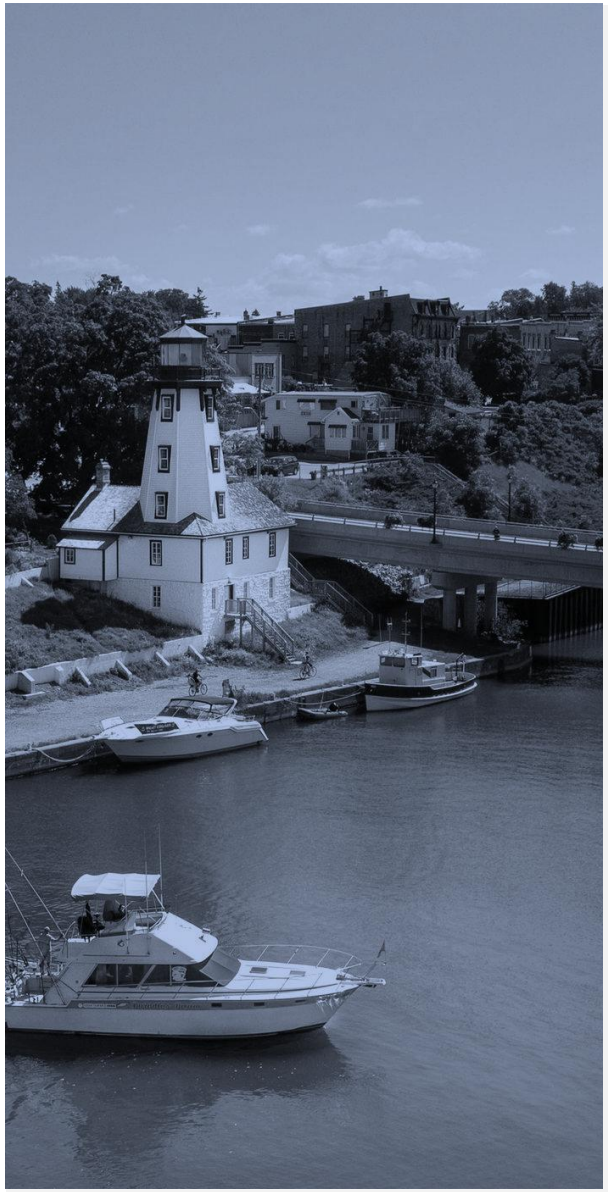
Businesses are split between keeping the Welcome Centre's schedule and extending it.

Forty-four percent say the current May to mid-October schedule is about right, while 22% would like the Centre open year-round and 16% later into the fall; 19% do not know. Among businesses with a view, just over half (54%) support the current schedule.

VIEW ON THE WELCOME CENTRE'S MAY TO MID-OCTOBER SCHEDULE



Base: all businesses (n=32). Q11A The Kincardine Welcome Centre is currently open from May to mid-October. Which of the following best reflects your view?



TOURISM GROWTH & MUNICIPAL SUPPORT

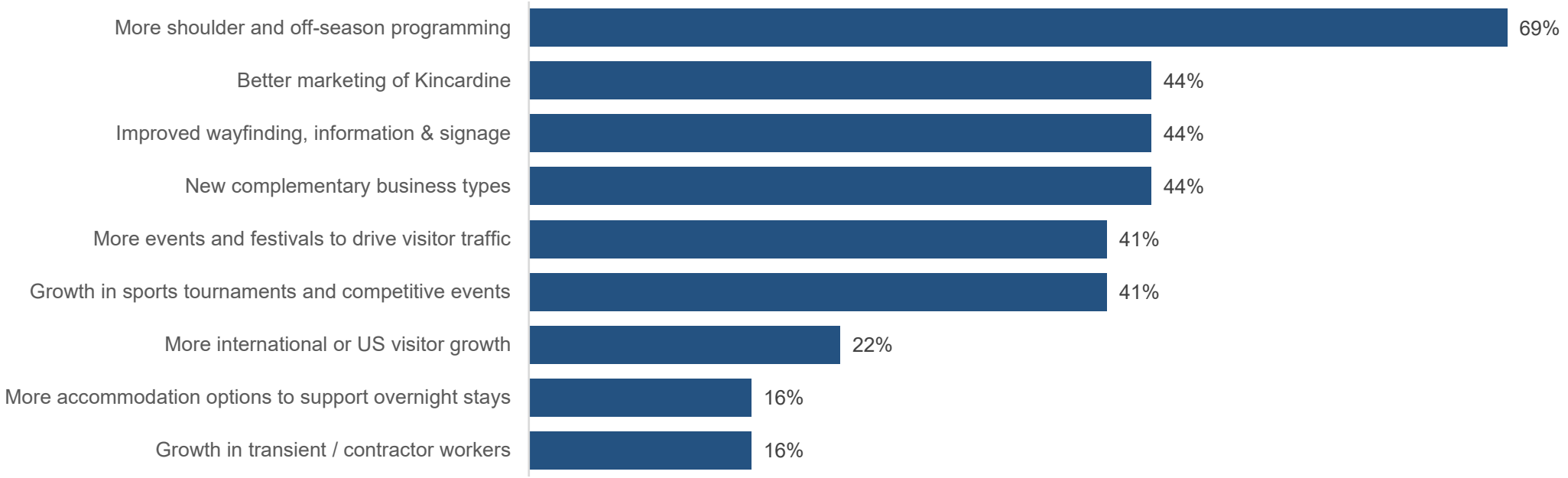
TYPES OF TOURISM GROWTH THAT WOULD BENEFIT BUSINESSES

All businesses

Shoulder and off-season programming is the type of growth businesses most want.

Seven in ten businesses (69%) say more shoulder and off-season visitor programming would benefit them. Better marketing of Kincardine, improved wayfinding and visitor information, and new business types that complement existing offerings (44% each) follow, along with more events and festivals and growth in sports tournaments (41% each).

TOURISM GROWTH THAT WOULD MOST BENEFIT THE BUSINESS



Base: all businesses (n=32). Q13 What types of tourism growth would most benefit your business? Multiple responses allowed. None of the above (12%) and not sure (6%) not shown.

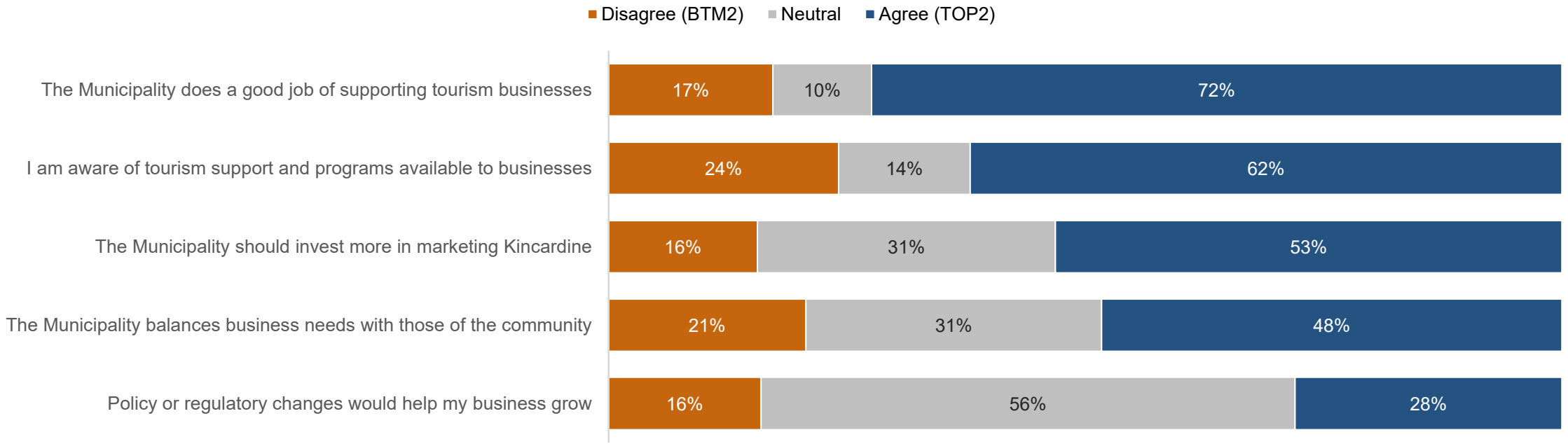
MUNICIPAL SUPPORT FOR TOURISM BUSINESSES

All businesses

Businesses view the Municipality's support for tourism positively.

Seven in ten (72%) agree the Municipality does a good job of supporting tourism businesses, and 62% are aware of the tourism-related support and programs available. Half (53%) agree the Municipality should invest more in marketing Kincardine, and 48% agree it balances the needs of businesses with those of the broader community. Most businesses are neutral on whether policy or regulatory changes would help them grow (56%).

AGREEMENT WITH STATEMENTS ABOUT TOURISM SUPPORT



Base: all businesses, excluding don't know and not applicable (n=25–32). Q14 To what extent do you agree or disagree with the following statements about tourism support in the Municipality of Kincardine?

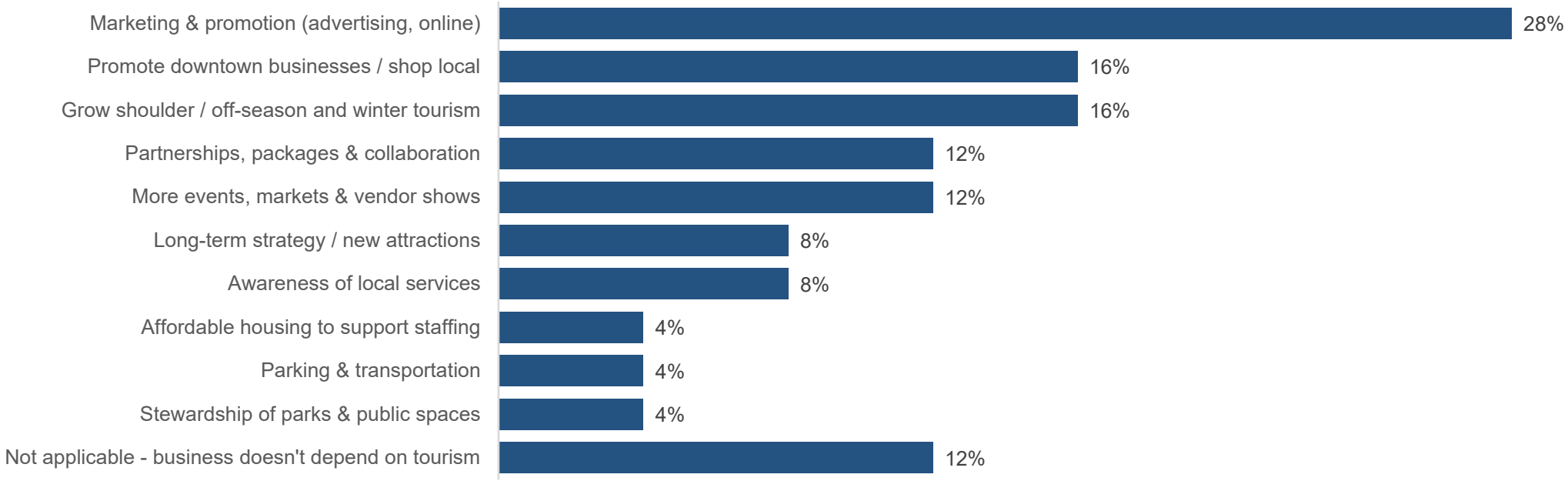
MOST IMPORTANT SUPPORT FOR BUSINESS GROWTH

Businesses that provided a response

Marketing and promotion is the single most important support businesses want from the Municipality.

Asked for the single most important thing the Municipality could do to support their growth through tourism, businesses most often mention marketing and promotion (28%), followed by promoting downtown businesses and shopping local (16%), growing shoulder-season and winter tourism (16%), partnerships and packages (12%) and more events and markets (12%). A further 12% say their business does not depend on tourism.

SINGLE MOST IMPORTANT THING THE MUNICIPALITY COULD DO



Base: businesses that provided a response (n=25). Q15 What is the single most important thing the Municipality of Kincardine could do to support your business's growth through tourism? Coded open-ended responses; multiple mentions allowed.



IN THEIR OWN WORDS…

Businesses want a coordinated, year-round approach that brings visitors downtown and keeps them coming back.

Partnerships and packages

"Supporting partnerships between local accommodations, businesses, and tourism organizations to create packages and experiences would also help showcase Kincardine as a place to visit, stay, and explore beyond the summer season."

One place to find it all

"A centralised tourism website, event calendar and coordinated stay play and explore packages"

Beyond summer

"more winter events that bring in customers"

Getting visitors downtown

"Better signage on Highway 21 directing travellers to downtown and other attractions"

Staffing

"More affordable housing so that businesses could be adequately staffed to provide impressive service to tourists, making them want to return more often."

Public spaces

"I think good stewardship of the parks and public spaces is key to making visitors think about making Kincardine home."