CONTEXT RESEARCH GROUP

CONTEXT IS EVERYTHING

KINCARDINE TOURISM PROFILE

Municipality of Kincardine
Baseline 2026
Final: October 2026

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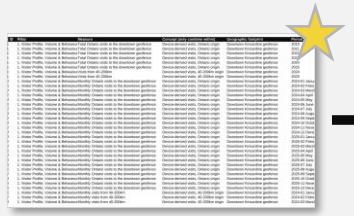
PROFILE, FRAMEWORK, GOVERNANCE & DATABASE



What you sent us

WORD + PDF

- Your data framework with the indicators you highlighted, plus TIAO's pillar KPIs.



The database

EXCEL WORKBOOK

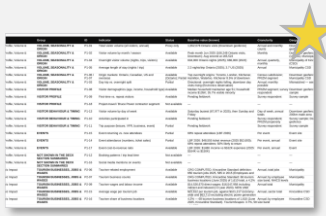
- About 500 rows: every metric, period, footprint, source, vintage and caveat.



The dashboard

WEB (INTERNAL)

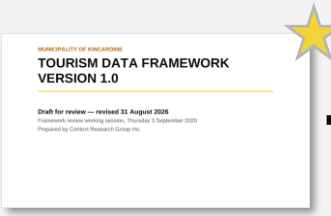
- Eight tabs over the database, to test coverage before writing.



The indicator summary

EXCEL WORKBOOK

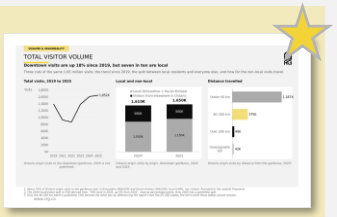
- One row per indicator, mapped back to the framework.



The framework document

PDF

- Definitions, how it was built, and how it should be used.

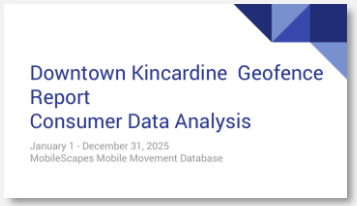


The Tourism Profile

POWERPOINT · FINAL

- Baselines pillar by pillar, plus the indicators still to collect.

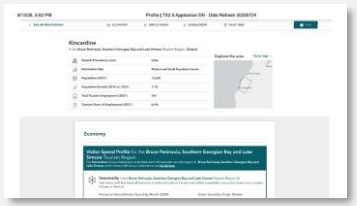
WHAT FEEDS THE DATABASE



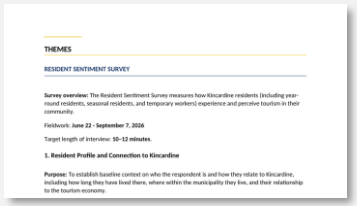
Environics MobileScapes geofence report · RTO7



Environics Visitor View overnight series · RTO7



Tourism Data Collective (TourismScapes) · web



2026 visitor, resident and business surveys · CRG



Lighthouse Blues Festival economic impact report



Bruce County tourism profile · benchmarking

★ DELIVERABLE

HOW TO READ THIS PROFILE

Term	What it means in this Profile
Tourism business	The 25 four-digit NAICS 2022 codes on Ontario's tourism industry list (consistent with Statistics Canada's Tourism Satellite Account), with two departures: 4854 school and employee bus transportation is out, 7223 special food services is in.
Downtown geofence	A mobile-location fence around downtown Kincardine, used throughout as an accepted proxy for the Municipality. About 70% of geofence visits are local residents, so the geofence total is never a visitor count.
40–200 km trade area	RTO7's own trade-area definition. Visits from beyond 200 km are about 3% to 5% of all visits, a CRG estimate from the report's origin tables.
CSD	Census subdivision, Statistics Canada's standard unit for a municipality; Kincardine is CSD 3541024. The geofence and the CSD are different footprints and cannot be divided into one another.
Seasons	Spring Apr–Jun / Summer Jul–Aug / Fall Sep–Nov / Winter Dec–Mar. Every seasonal figure in this Profile is rolled up on these four boundaries, which match the visitor survey's season definitions.
Tourism jobs	The Municipality's own count: 585 jobs in 2015 and 702 in 2025 (Tourism Economic Impacts, 2026). CRG's NAICS selection on Lightcast gives 650 for 2025, and the two Lightcast data runs disagree by 20 points on decade growth, so shares are computed inside one Lightcast table rather than mixing sources.
Two economic models	Lightcast's input-output model (reference year 2023, via McSweeney / BCED) sits behind the $74.3M and $85.1M. Ontario's TREIM sits behind the $2.33M festival figure, run by the festival's consultants, and behind CRG's $43.8M destination-wide estimate. The two models are not additive and should never be combined.
Ontario benchmark	Destination Ontario's Ontario Travel & Tourism Monthly (OTTM): Ontario residents aged 25–64, in 3-month rolling waves. Each slide says whether it uses the June to August 2026 wave or the 12-month average.
Directional	A result from fewer than 50 respondents. Good for pattern, not for planning or budget decisions.

OVERVIEW

EXECUTIVE SUMMARY

Visitors are loyal, come from 40–200 km away for the beaches and leave happy. Summer is the peak, and fall is where the growth is

WHEN THEY COME

2×

Summer vs. October–April

WHO COMES

93%

Had visited before

WHY THEY COME

58%

Come for the beaches

WHAT THEY SPEND PER PARTY

$1,127

Promoters

$740

Passives and detractors

HOW PEOPLE FEEL

92%

Satisfied with their visit

WHERE THE GROWTH IS

78%

Plan to return in the fall

Source · Environics MobileScapes via RTO7, 2025 report · 2026 Visitor Survey (CRG), unweighted.

TOURISM ROI: HOW MUNICIPAL SPENDING PAYS BACK

Visitor spending of about $44M a year supports about $28M of GDP in Bruce County. The Municipality's investment and its own revenue and costs are the missing links

MUNICIPALITY INVESTS

Marketing and promotion	$?
Events and festivals	$?
Beaches, parks and waterfront	$?
Welcome Centre and visitor services	$?
Roads, parking and washrooms	$?
Business and product support	$?

INPUT NEEDED
Annual spend in each area, ideally five years. Finance.

VISITORS COME

374,642
visits from 40–200 km to downtown, 2025

604,000
overnight nights by Ontario visitors, municipality, 2025

58%
of trips overnight; 3.4 people per party

INPUT NEEDED
Visits across the whole municipality, counted as travel parties. RTO7 geofence.

Visitor survey →

VISITORS SPEND

$1,020
per travel party per trip, 2026

47%
of it on accommodation; 18% on restaurants

$1,208
summer trip

TREIM →

A) LOCAL ECONOMY

Tool: **TREIM**, Bruce County
Local check: Lightcast

$43.8M
visitor spending a year, CRG estimate (2026)

$28.2M
GDP it supports in Bruce County (TREIM)

702 jobs
in tourism businesses, 2025

Tourism ROI = (visitor-driven economic return + net municipal revenue) ÷ **municipal tourism spend**

Dashed boxes: data required from the Municipality or its partners

Visits (Environics MobileScapes via RTO7, downtown geofence) and nights (Environics VisitorView) are different measures and are not added together. Party, trip and spend: 2026 Visitor Survey, n=426, five extreme answers removed. Local economy: CRG estimate built season by season: 407,000 downtown visits from 40 km and more become about 65,800 travel parties (survey party size and trip length), times each season's own survey spend mix, run through TREIM (Bruce County, 2026; induced business investment off). GDP is the value that stays in Bruce County. Jobs: Municipality figure (702). Sector sales: Lightcast 2025.3, all customers.

PILLAR 1: VISITOR PROFILE, VOLUME & BEHAVIOUR

Who is visiting the Municipality of Kincardine, how many, when, and where they come from.

PILLAR 1

PILLAR 1: VOLUME, PROFILE & BEHAVIOUR

Subdomain	Indicator	Baseline (latest published)	Baseline source
Volume & seasonality	Total visitor volume ★	374,642 visits from 40–200 km (2025)	Downtown geofence, 40–200 km band. The all-origin total of 1,652,000 includes local residents, about 70% of it.
	Volume by month and season ★	Average visits a month: summer 48,000, spring 37,000, fall 25,000, winter 23,000 (2025)	40–200 km trade-area series; each season's total divided by its months (winter is December to March). Two years only; no monthly history before 2024.
	Timing by day of week	Saturday peak, 68,000 visits (2025)	Geofence day-of-week series, 40–200 km band, two years
	Overnight volume and length of stay ★	604,000 Ontario visitor nights (2025)	VisitorView, Kincardine CSD; 2.3 nights per trip. A different footprint from the geofence.
Origin & visitor profile	Origin markets ★	Kitchener, 7.6% of 40–200 km visits (2025)	Geofence CSD rankings, 40–200 km band. The 2026 Visitor Survey shows the same regional mix.
	Visitor demographics ★	Median household-maintainer age 51 (2025)	Profile of the areas 40–200 km visitors come from (geofence report), not measured people
	Travel party size and composition ★	3.4 people per party; 66% travel with a partner, 23% with children (2026)	2026 Visitor Survey, n=426 (party size) and n=360 (who they travel with)
	Diversity	15% of surveyed visitors identify as BIPOC (2026)	2026 Visitor Survey, n=394, self-identified
	Repeat visitation ★	93% of surveyed visitors had been before (2026)	2026 Visitor Survey, n=426
Behaviour & events	Trip purpose ★	39% visiting friends or family (2026)	2026 Visitor Survey, n=423. Visitors could give more than one reason.
	Activities ★	Dining out, 71% (2026)	2026 Visitor Survey, n=426. Visitors could give more than one activity.
	Events: attendance and repeat visitation	69% repeat attendees (Blues Festival 2026)	A single-event attendee survey. No Kincardine event publishes a total attendance count.

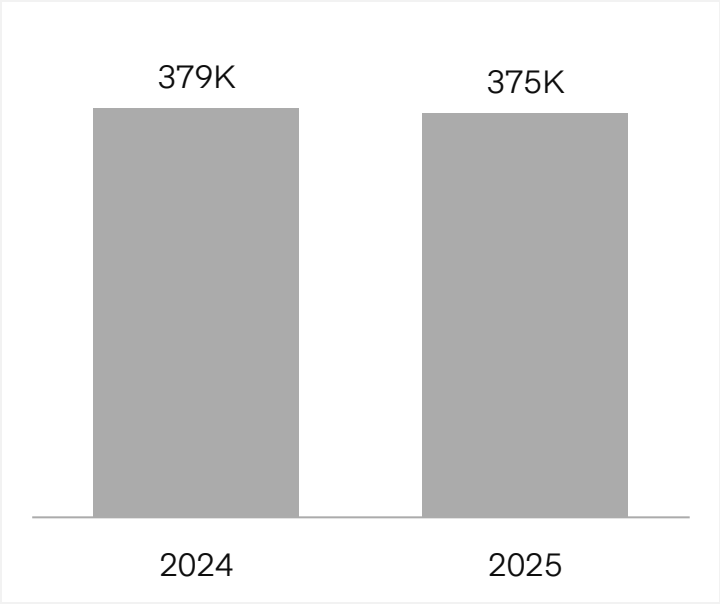
★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

Items not yet collected are listed in the appendix.
Source · Environics MobileScapes and VisitorView via RTO7, 2025 reports · 2026 Visitor Survey (CRG), unweighted · Lighthouse Blues Festival 2026 Economic Impact Report.

TOTAL VISITOR VOLUME

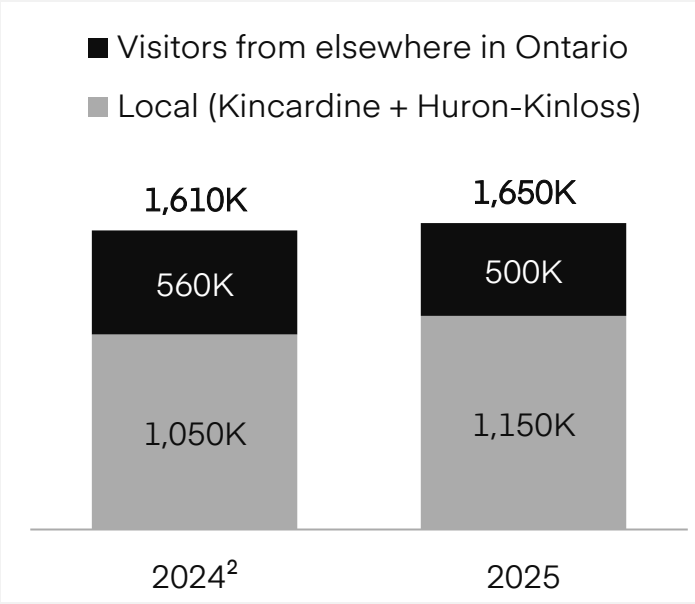
Seven in ten downtown visits are local[1]; visits from 40–200 km held steady in 2025, down 1%

Visits from 40–200 km, 2024 and 2025



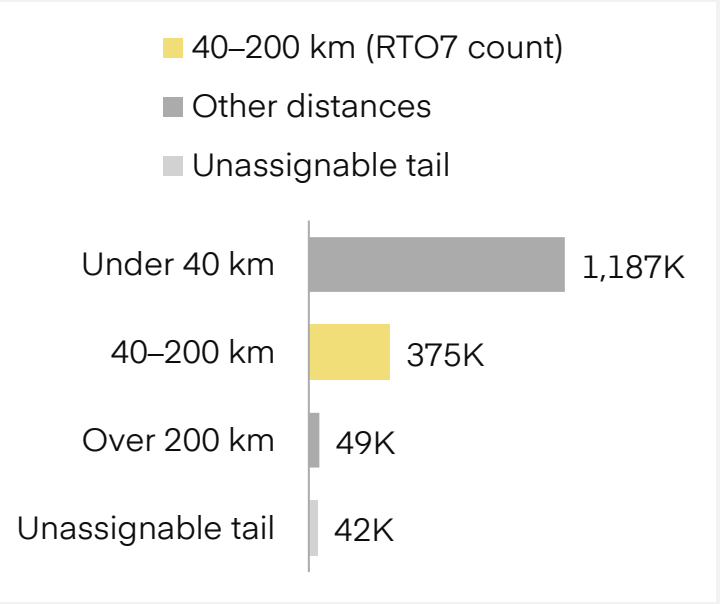
Visits from 40–200 km to the downtown geofence, RTO7's visitor count. Earlier years are published only as all-origin totals.

Local and non-local



Ontario-origin visits by origin, downtown geofence, 2024 and 2025.

Distance travelled

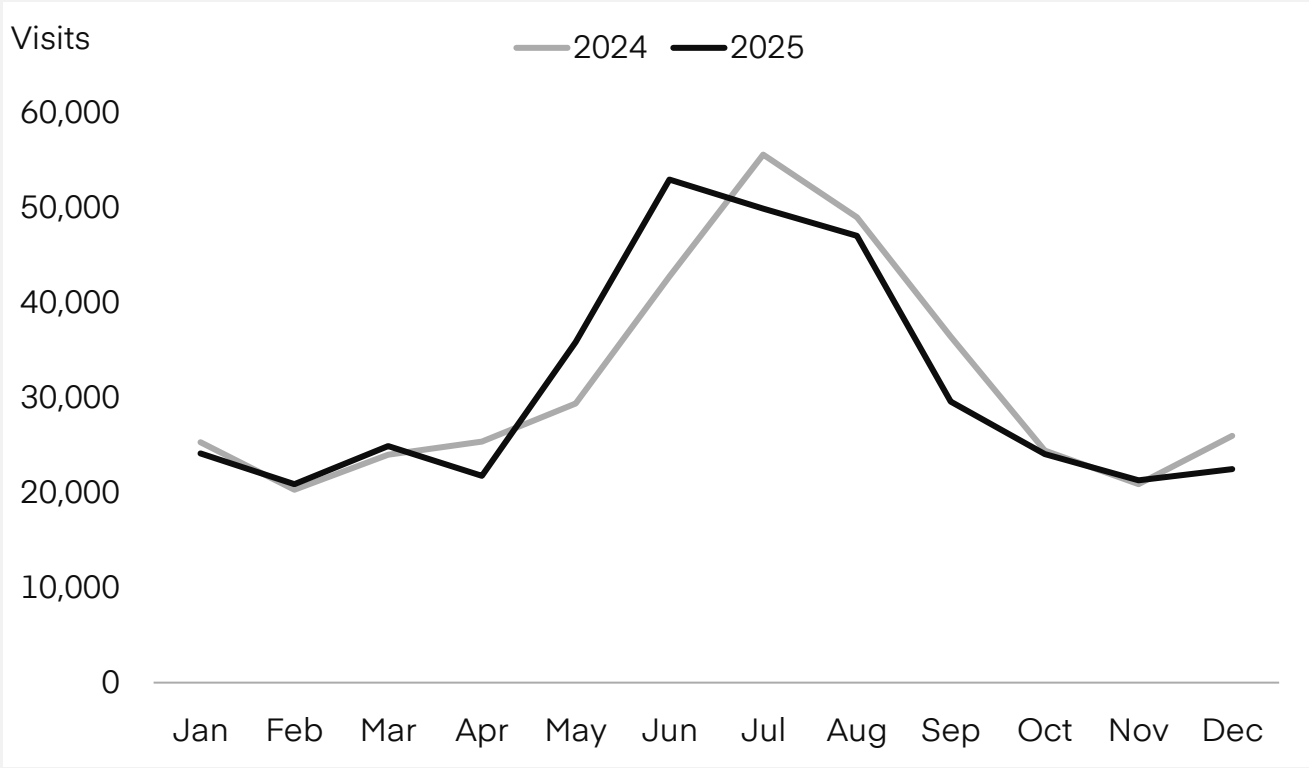


Ontario-origin visits by distance from the geofence, 2025[3].

1. About 70% of Ontario-origin geofence visits start in Kincardine (888,000) and Huron-Kinloss (266,000): local traffic, not visitors. Of Kincardine's 887,582 visits, 871,702 fall under 40 km. Rounded to the nearest thousand. 2. The 2024 split is CRG-derived from "70% local in 2025, up 5% from 2024", taken as percentage points. 3. Only the 40–200 km band is published; CRG derived the other two by differencing the report's two Top-25 CSD tables. All-origin visits rose 18% from 2019 (1,396,000) to 2025 (1,652,000).

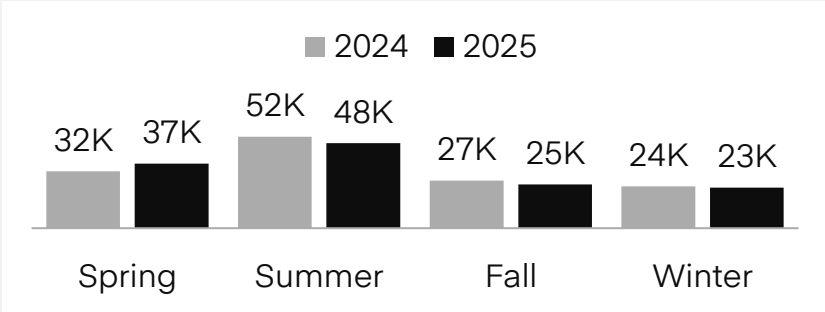
SEASONAL PATTERN: MONTHLY VISITS

Visits shifted earlier in 2025: spring up 13% and fall down 8%



Monthly visits, 40–200 km trade area, downtown geofence.

Average monthly visits by season



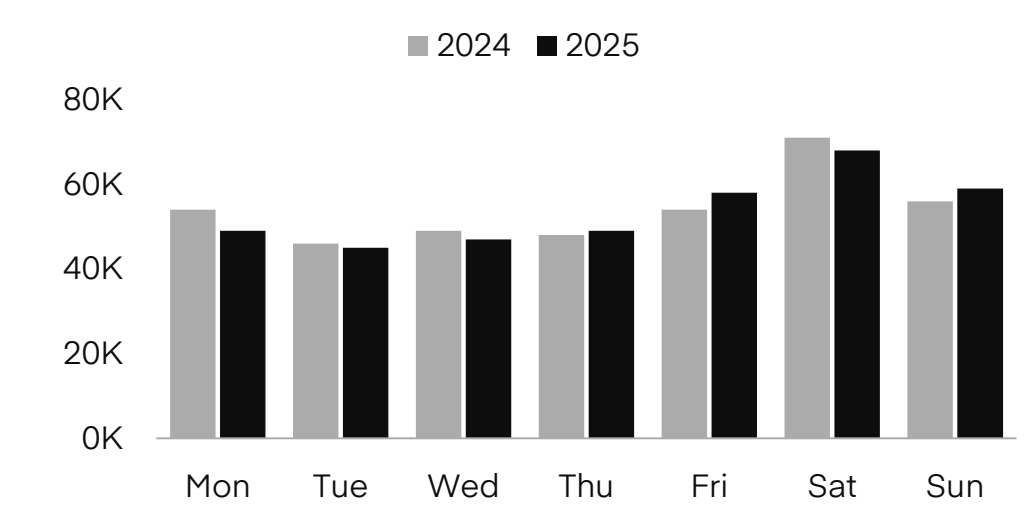
Season total ÷ months in the season, 40–200 km band.

Season, 40–200 km band	2024	2025 (change)
Spring (Apr–Jun)	97,000	111,000 (+13%)
Summer (Jul–Aug)	105,000	97,000 (-7%)
Fall (Sep–Nov)	82,000	75,000 (-8%)
Winter (Dec–Mar)	96,000	92,000 (-3%)
Total	**379,000**	**375,000 (-1%)**

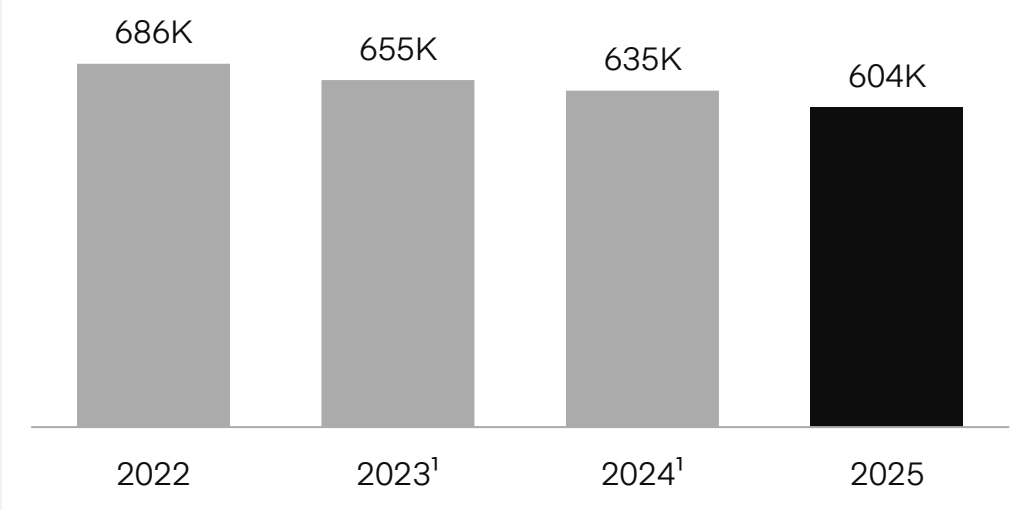
Source · 40–200 km trade area, downtown Kincardine geofence · Environics Analytics via RTO7 · 2025 report.

WEEKEND VISITS & OVERNIGHT DEMAND

Saturday is still the busiest day, but Friday and Sunday are the days that grew



Overnight nights keep falling while the length of each stay holds at about 2.3 nights



40–200 km visits	Mon	Tue	Wed	Thu	Fri	Sat	Sun
2024	54,000	46,000	49,000	48,000	54,000	71,000	56,000
2025	49,000	45,000	47,000	49,000	58,000	68,000	59,000

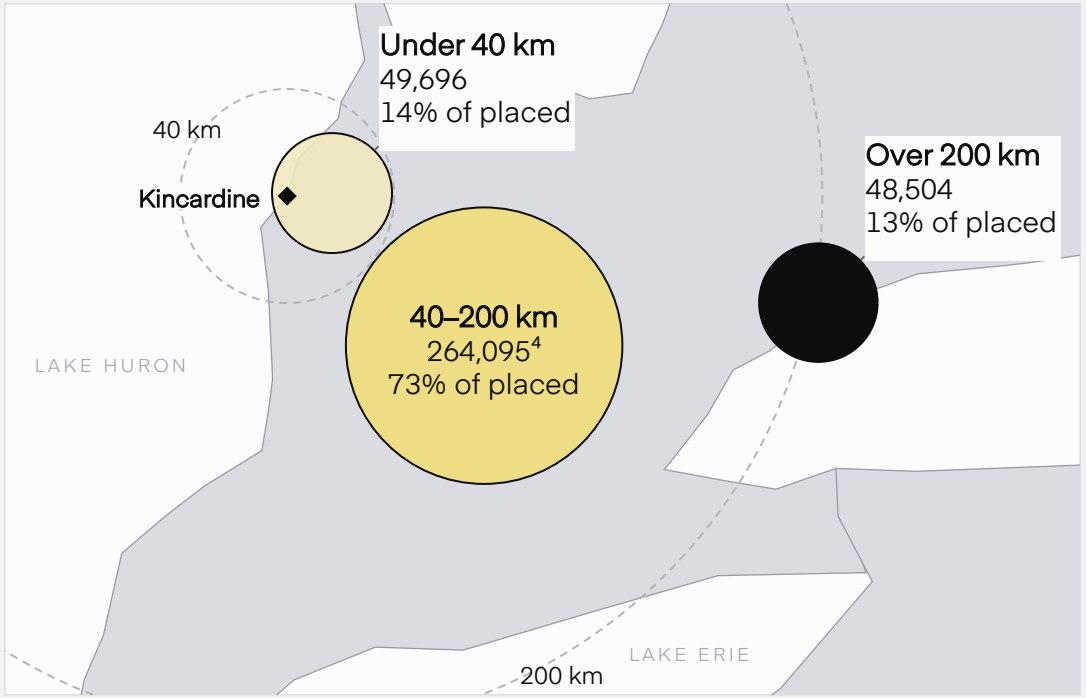
Municipality of Kincardine (CSD[2])	2022	2023	2024	2025
Ontario nights	686,000	655,000	635,000	604,000
Ontario nights per trip	2.4	2.4	2.4	2.3
US nights per trip	4.4	4.3	3.9	3.7

1. 2023 and 2024 nights are CRG-derived from a published percentage change. US-origin nights and trips are published for 2022 only (27,000 nights, 6,211 trips); nights per trip continues to 2025. 2. CSD = census subdivision; a CSD figure covers the whole municipality, not only the downtown core.
Source · downtown Kincardine geofence and Municipality of Kincardine (CSD 3541024) · Environics Analytics (MobileScapes, VisitorView) via RTO7 · 2025 reports.

NON-LOCAL ORIGINS: DISTANCE & COUNTY

Of the non-local visits that can be placed, 73% come from 40 to 200 km out; Bruce, Waterloo and Grey supply 47%[2]

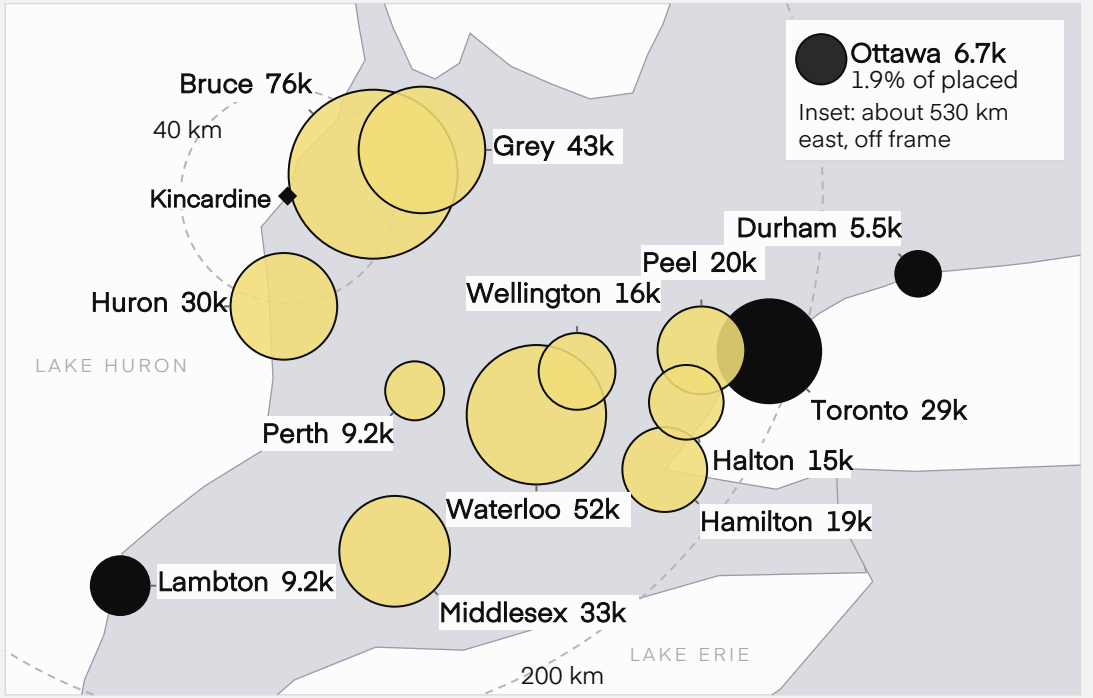
By distance band



Non-local visits by distance from the downtown geofence, 2025[1].

DISTANCE BAND ○ Under 40 km ○ 40–200 km ● Over 200 km

By county



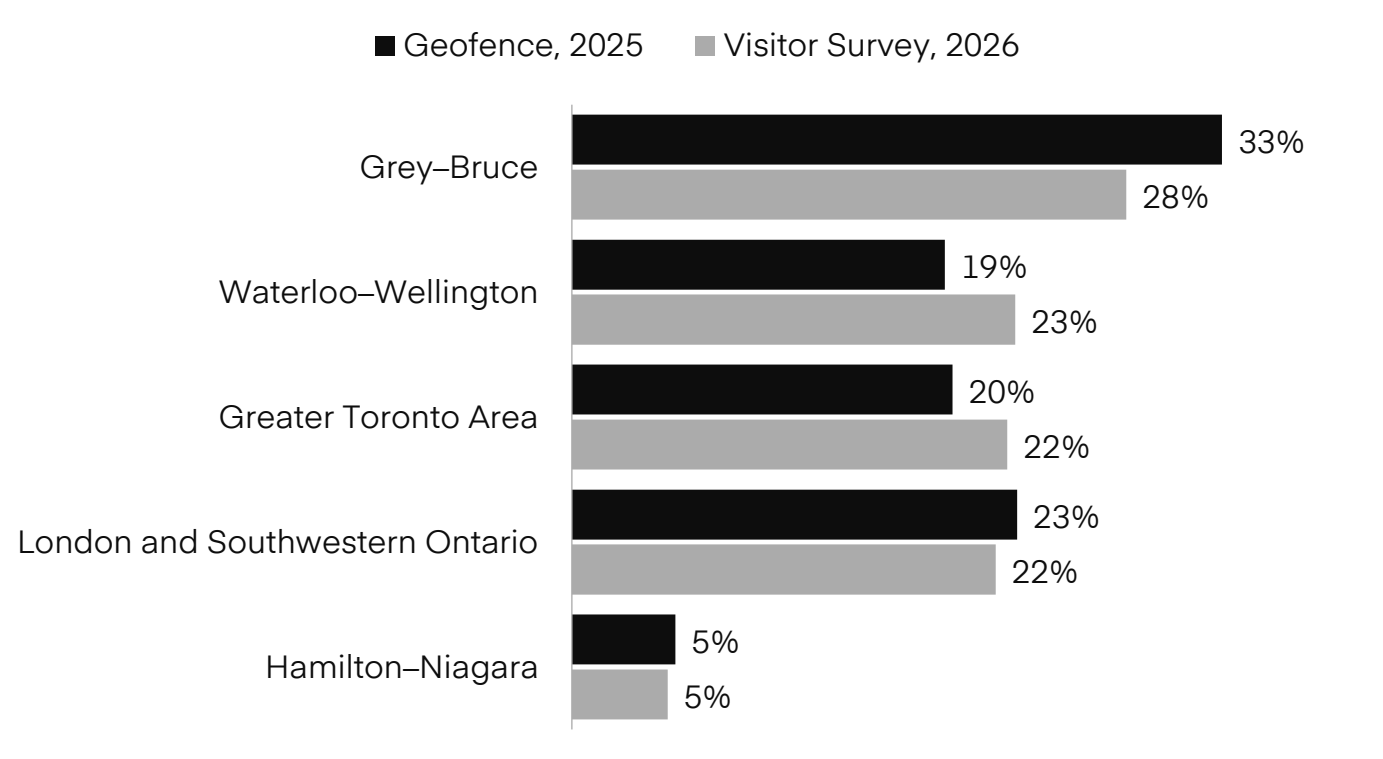
Non-local visits by county of origin, 2025[1].

Circle area = visits, scaled within each map. Rings: 40 km and 200 km, straight line from downtown[3].

1. Downtown Kincardine geofence, Environics MobileScapes via RTO7, 2025; origins from the report's two Top-25 CSD tables. 2. Local visits (Kincardine, Huron-Kinloss) excluded. Of 498,486 non-local visits, 362,295 (73%) come from named municipalities; the rest fall below the rank-25 cut. 3. Only the 40–200 km band is published; the other two are CRG estimates. Environics uses road distance, so the rings are indicative. 4. The named non-local part of the band's 374,642 visits (Total visitor volume slide).

ORIGIN MARKETS: TWO SOURCES AGREE

The survey and the mobile-location data converge on the same top four visitor places of origin



Share of visits (geofence) and of surveyed visitors (survey) from each region, rebased to these five regions.

US visitors

3.8%

of 2022 overnight nights (VisitorView)

4%

of surveyed visitors live in the US (n=426)

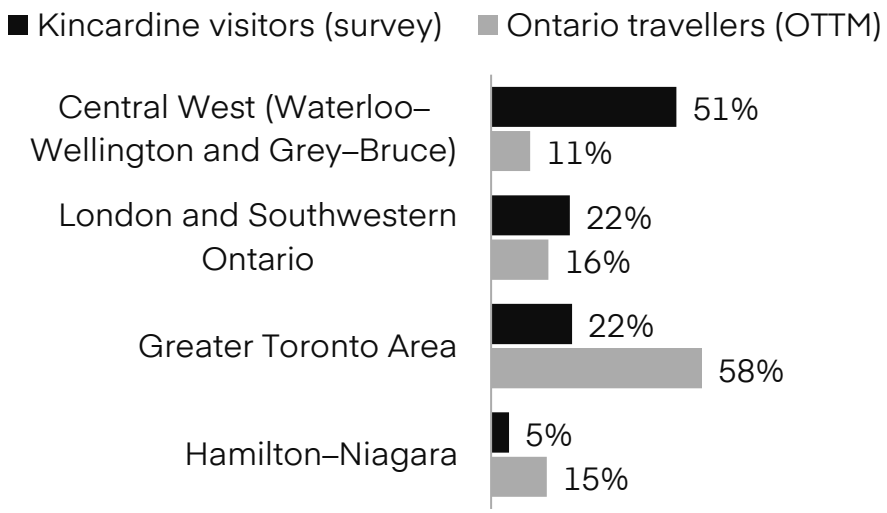
Geofence: CRG grouping of the named municipalities in the report's two origin tables, non-local visits only. Survey: Q1A, "other" and smaller regions left out before rebasing.
Source · Environics MobileScapes and VisitorView via RTO7, 2025 reports · 2026 Visitor Survey (CRG), unweighted · Q1A, Q1VIS.

ORIGIN MARKETS AGAINST ONTARIO'S TRAVELLERS

Central West, which includes Grey–Bruce, sends Kincardine almost five times its share of Ontario's travellers; Hamilton–Niagara and the GTA send about a third of theirs

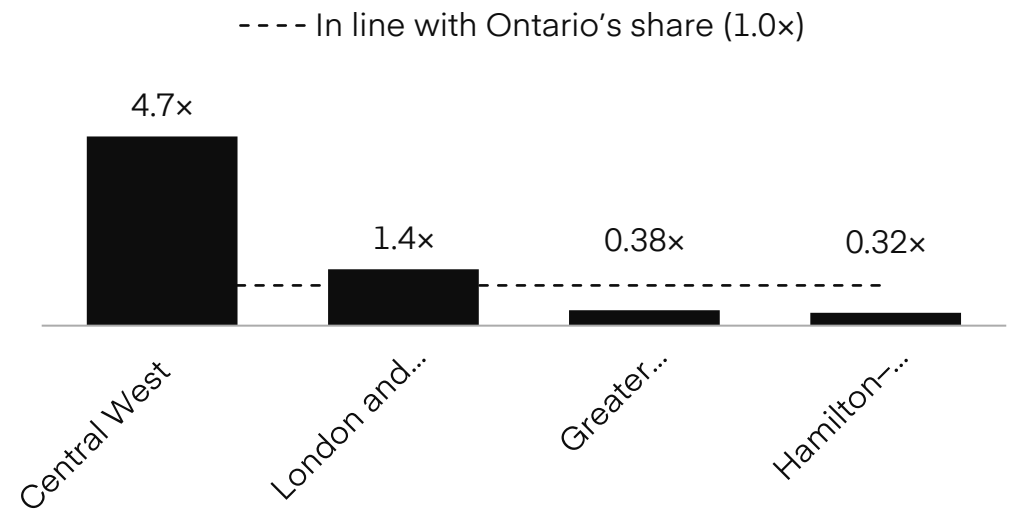
This compares where Kincardine's Ontario visitors live with where Ontario's travellers live, on the same four regions as the previous slide. The index shows which regions send more or fewer visitors than their size suggests: 1.0× means a region sends visitors in line with its share of Ontario's travellers.

Where visitors live, against Ontario's travellers



Share of Kincardine's Ontario visitors (Q1A, n=387 before rebasing) and of Ontario residents aged 25–64 (OTTM S4A), each rebased to these four regions.

Visitors per share of Ontario's travellers (index)



Visitor share divided by Ontario traveller share. Above 1.0×, a region sends more visitors than its size suggests.

Region lines don't match exactly: OTTM's GTA runs north to Barrie and the survey's GTA includes Durham. OTTM covers ages 25–64 only, Sep 2025 to Aug 2026. The index is directional.
Source · 2026 Visitor Survey (CRG), unweighted · Q1A · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM), Ontario market · S4A.

VISITOR PROFILE: HOME AREAS

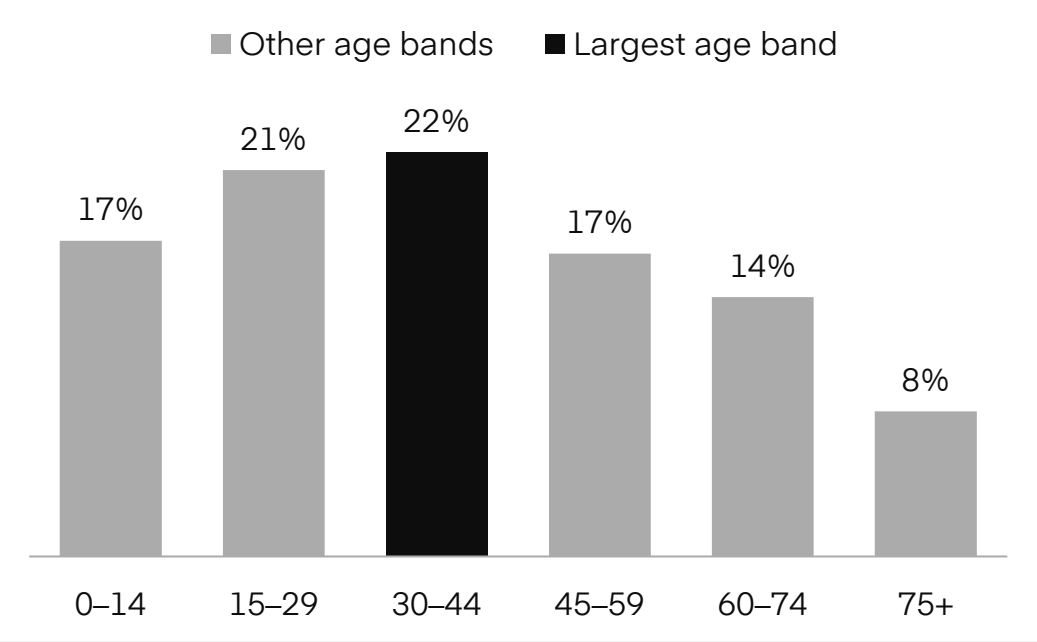
51

Median age of household maintainer, visitors' home areas[1]

$135,000

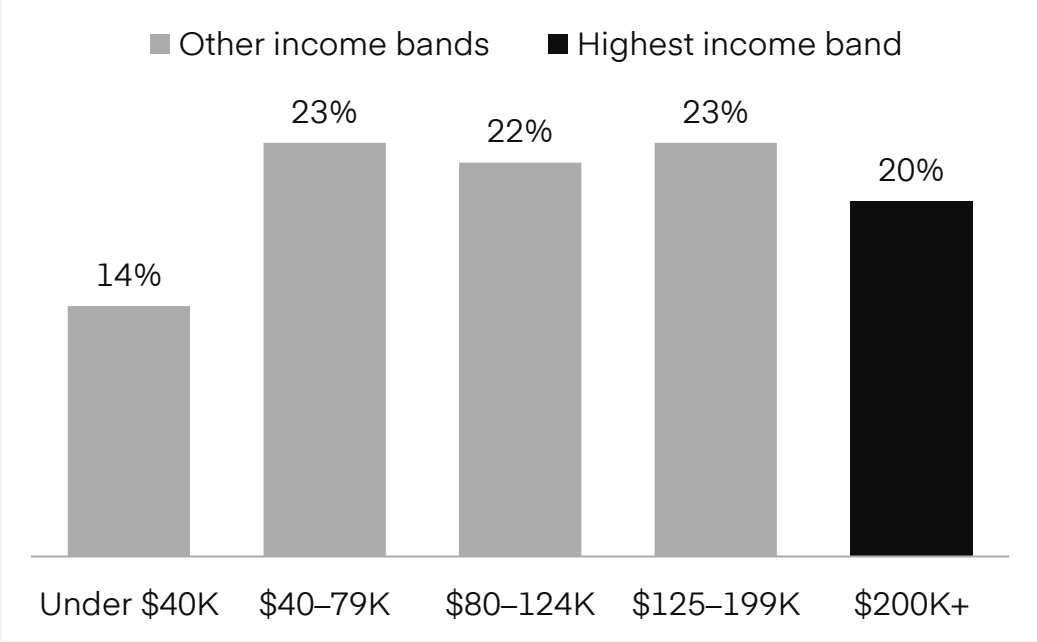
Average household income, visitors' home areas

Home areas span every age band; 30–44 leads at 22%



Population of visitors' home areas by age band, 40–200 km trade area, 2025.

Incomes in those areas spread evenly; a fifth earn $200K+



Household income of visitors' home areas, 40–200 km trade area, 2025.

1. Census profile of each visitor's home area, weighted by visits: it describes where visitors live, not the visitors themselves.
Source · 40–200 km trade area, downtown Kincardine geofence · Environics Analytics via RTO7 · 2025 report.

VISITOR PROFILE: DIVERSITY

15% of surveyed visitors identify as BIPOC, against 35% of Ontario's travelling public

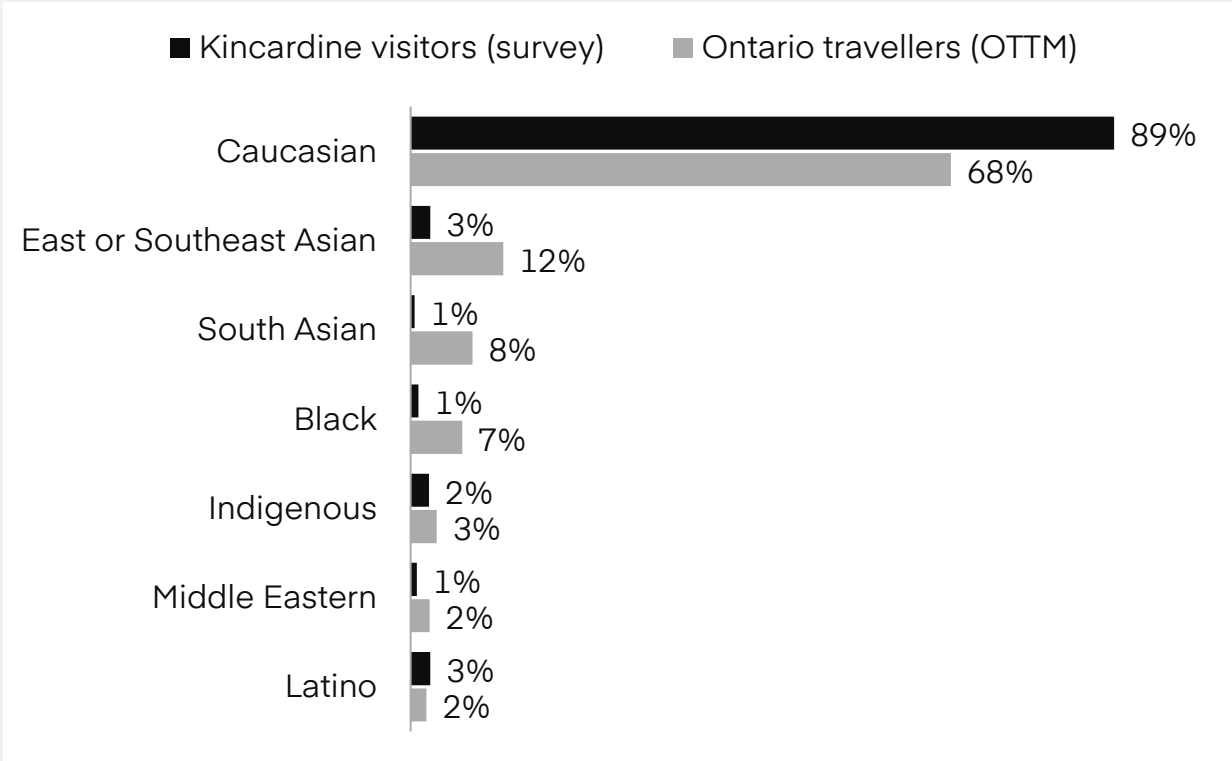
15%
Of surveyed visitors identify as BIPOC (n=394)

35%
Of Ontario travellers identify as BIPOC (OTTM, 12 months)

How this compares

Visitors to Kincardine are less diverse than the people who travel in Ontario: 15% against 35%.

The geofence report puts the home areas of 40–200 km visitors at 36% visible minority, close to the OTTM figure. So Kincardine's home markets look like Ontario as a whole. The gap is in who visits, or in who answered the survey.



Ethnic or cultural background, share of surveyed visitors (n=394) and of Ontario residents aged 25–64 (OTTM S3, Sep 2025 to Aug 2026). "Prefer not to answer" (8% of visitors) not shown.

BIPOC includes Indigenous respondents, so it is close to but not the Statistics Canada visible-minority definition. Both questions allow more than one answer, so shares add to more than 100%. Geofence: 36% visible minority for the home areas of 40–200 km visitors (census profile, Environics Analytics via RTO7, 2025 report).
Source · 2026 Visitor Survey (CRG), unweighted · D1 · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM), Ontario market · S3.

VISITOR TRIP PROFILE

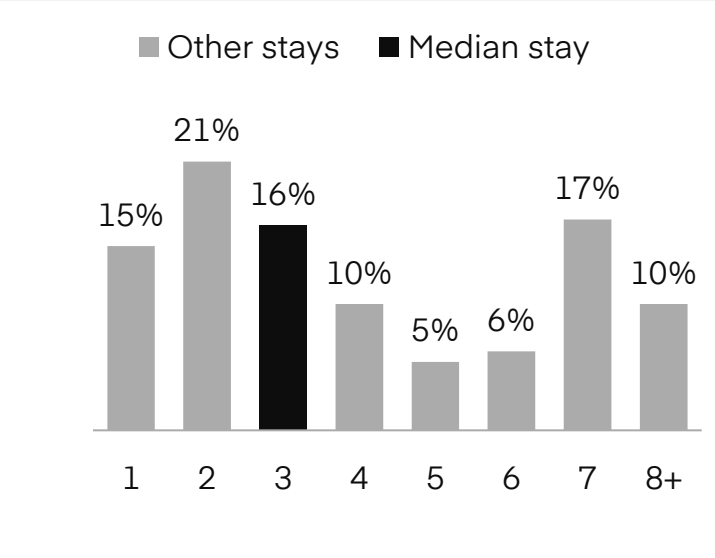
58%
Overnight trips

93%
Had visited before

38%
Of repeat visitors came more than 10 times in three years

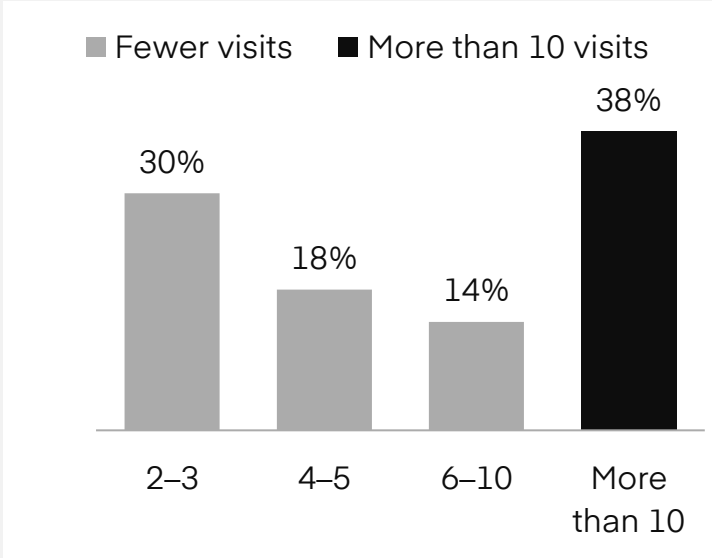
3.4
People in the average travel party

Overnight guests stay a median of three nights



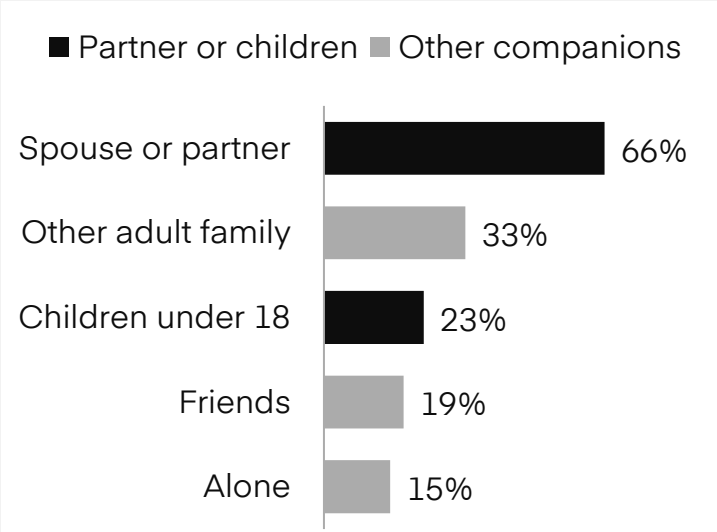
Nights stayed, overnight visitors, 2026 (n=241).

38% of repeat visitors have come more than ten times



Visits in the past three years, repeat visitors (n=395).

Two in three travel with a partner and almost a quarter bring children

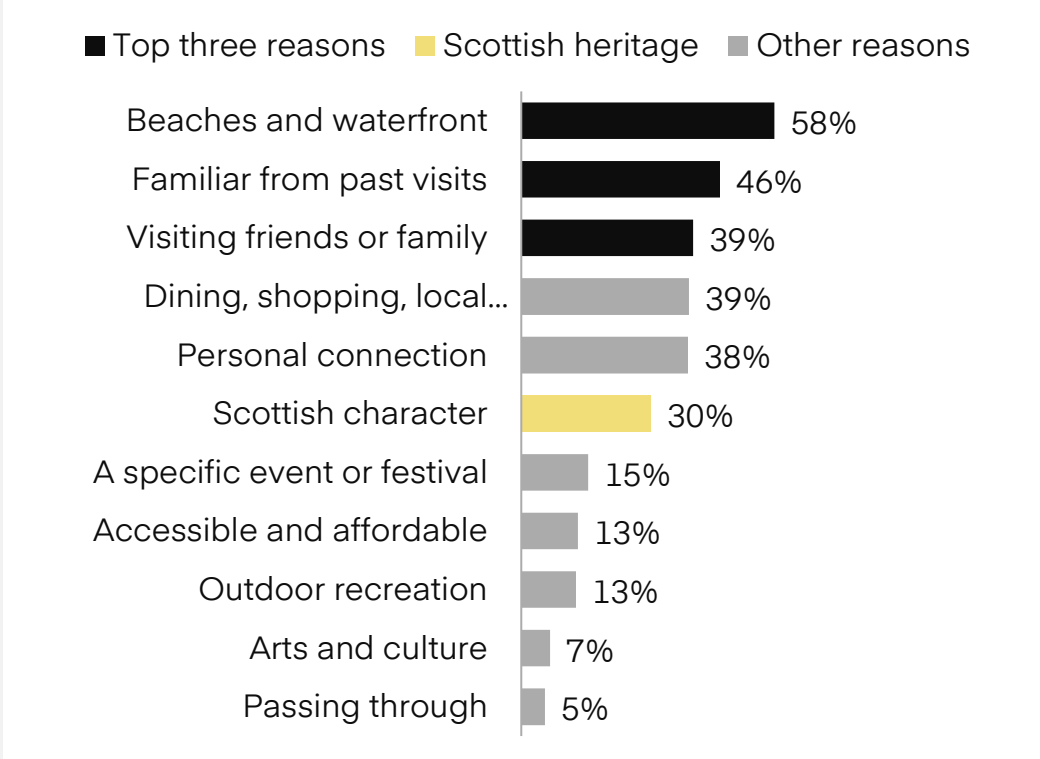


Who they travelled with, share of visitors (n=360, more than one answer allowed).

Source · 2026 Visitor Survey (CRG), unweighted.

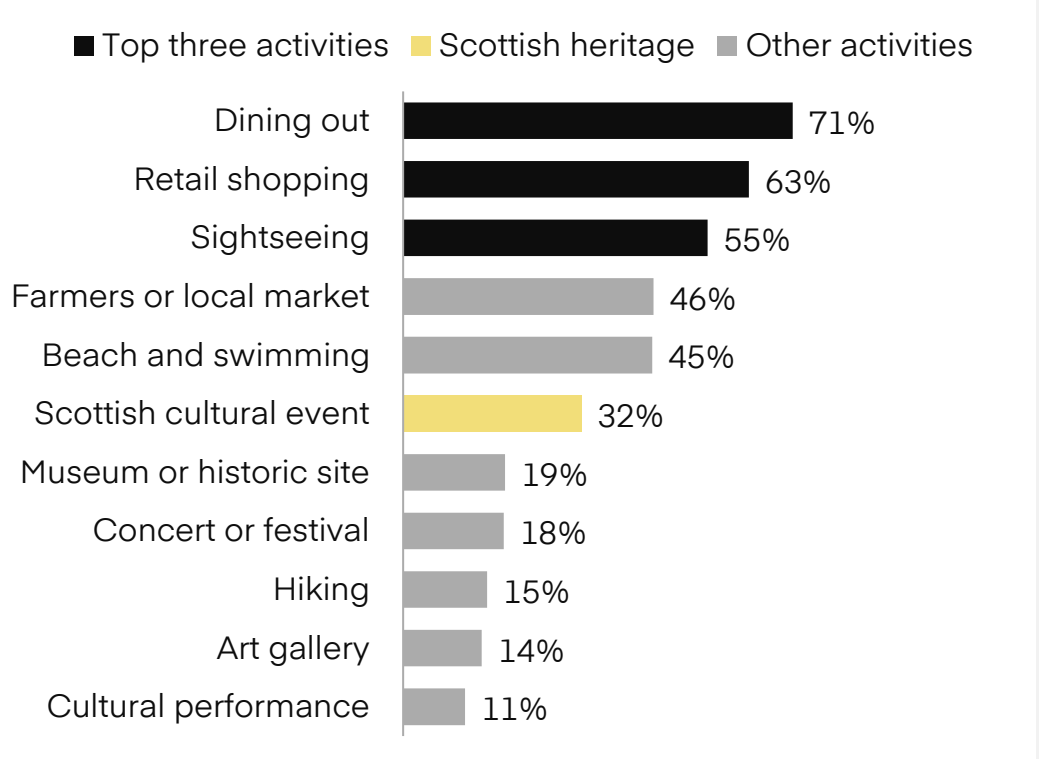
TRIP PURPOSE & ACTIVITIES

Beaches are the biggest draw, and two in five visitors come to see friends or family



Reasons for visiting, 2026, share of visitors (n=423, more than one answer allowed)[1].

Dining out and shopping lead what visitors do once they are here



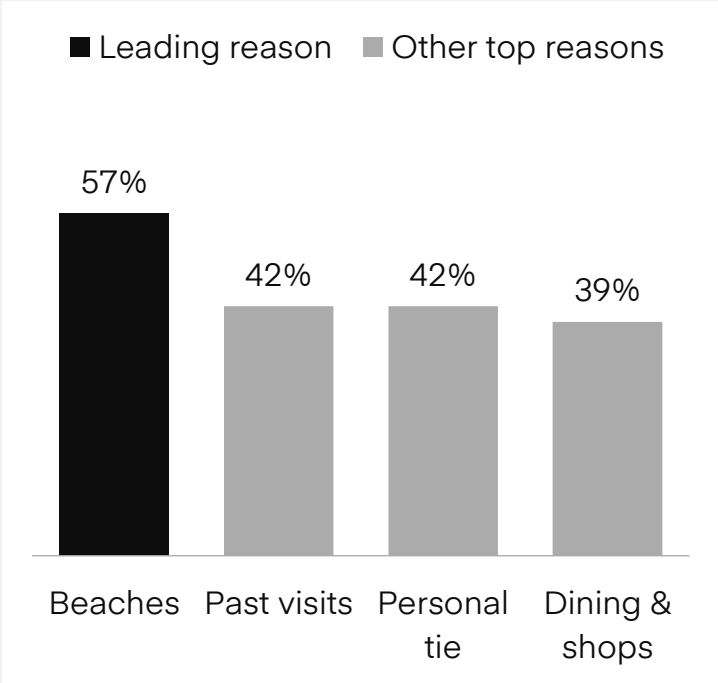
Activities during the visit, 2026, share of visitors (n=426, more than one answer allowed).

1. Framework trip-purpose groups: visiting friends or family 39%, a specific event 15% (a further 3% name a sports tournament), business 3% (work, e.g. Bruce Power); the remaining reasons are leisure.
Source · 2026 Visitor Survey (CRG), unweighted · Q8, Q7 (activities rebased to the full sample).

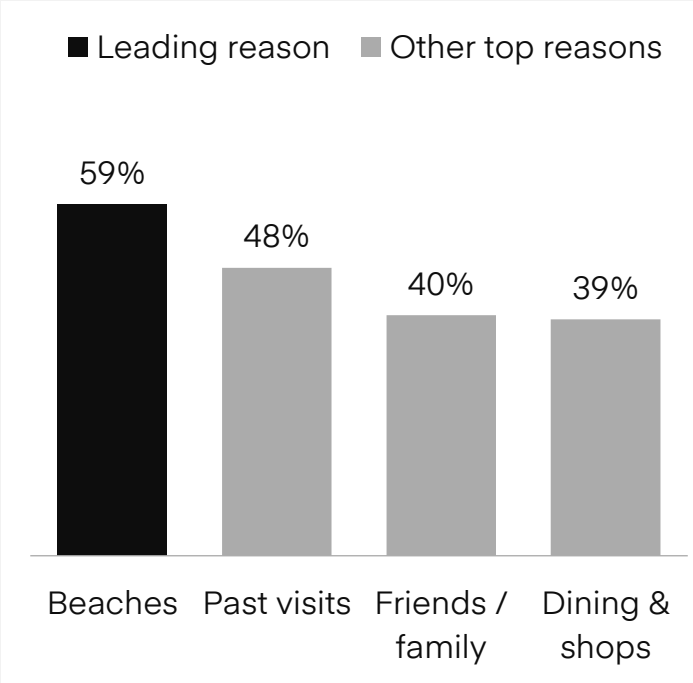
REASONS FOR VISITING BY SEASON

Beaches and familiarity lead the reasons to visit in spring, summer and fall

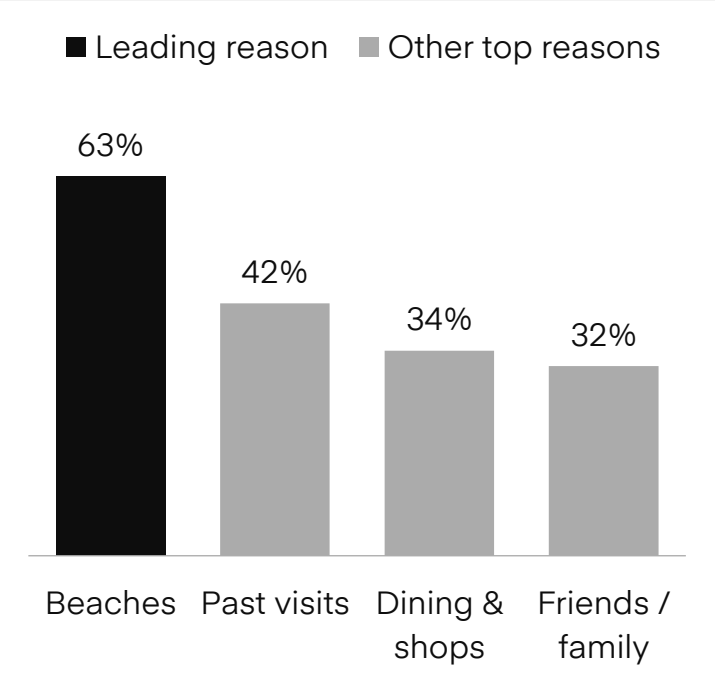
Spring (n=77)



Summer (n=302)



Fall (n=38) · directional

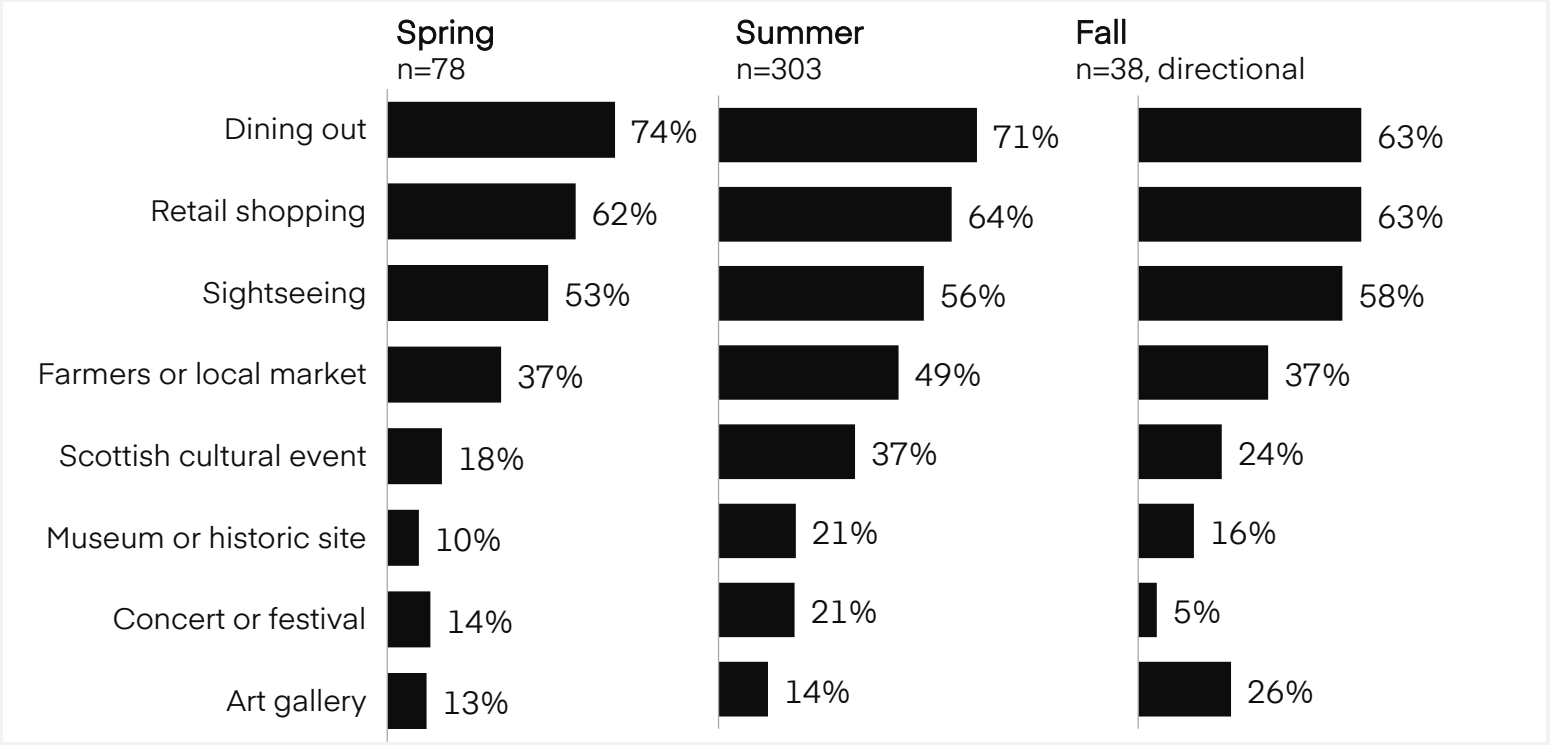


Top four reasons for visiting in each season, share of visitors who came in that season, 2026 (more than one answer allowed).

Winter is not shown: six visitors. Fall base is low (n=38), so fall results are directional.
Source · 2026 Visitor Survey (CRG), unweighted · Q8, Q1B.

ACTIVITIES BY SEASON

The same three activities lead in every season; summer adds markets and Scottish events, fall adds galleries



Activities during the visit, share of visitors who came in each season, 2026 (more than one answer allowed).

What changes by season

Summer: farmers' markets reach half of visitors (49%), Scottish events 37% and museums 21%, each the highest of the year. The beach draws 64%; beach activities were offered as a choice in summer only, so they are not charted.

Fall: art galleries draw 26%, performances 16%. Concerts and festivals fall to 5%.

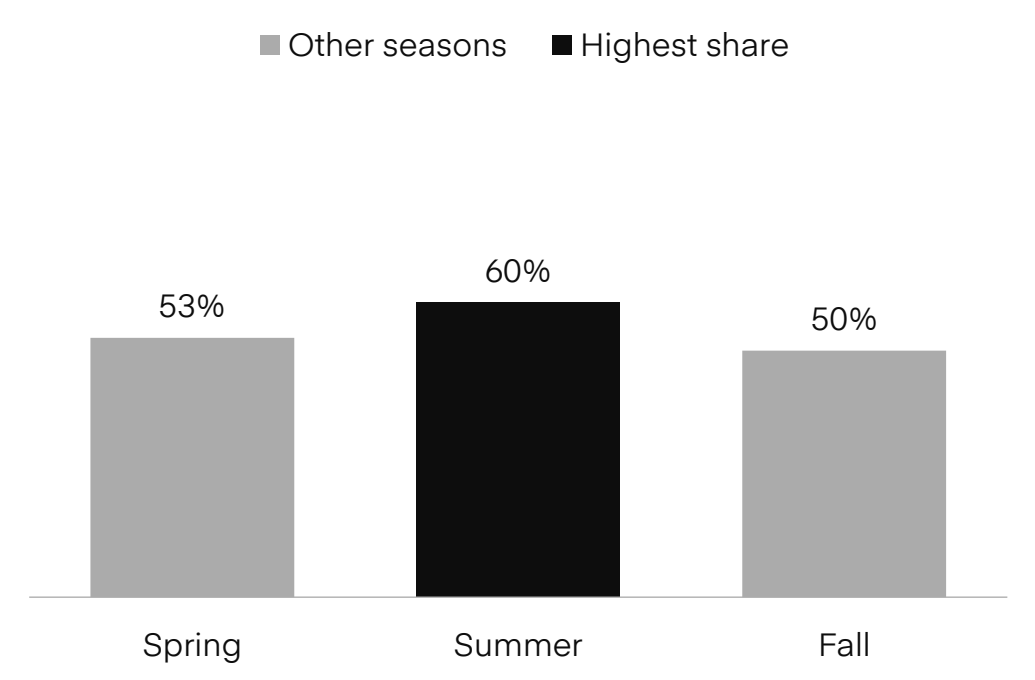
Spring: dining out peaks at 74%.

Winter is not shown: seven visitors. Fall base is low (n=38), so fall results are directional.
Source · 2026 Visitor Survey (CRG), unweighted · Q7, Q1B.

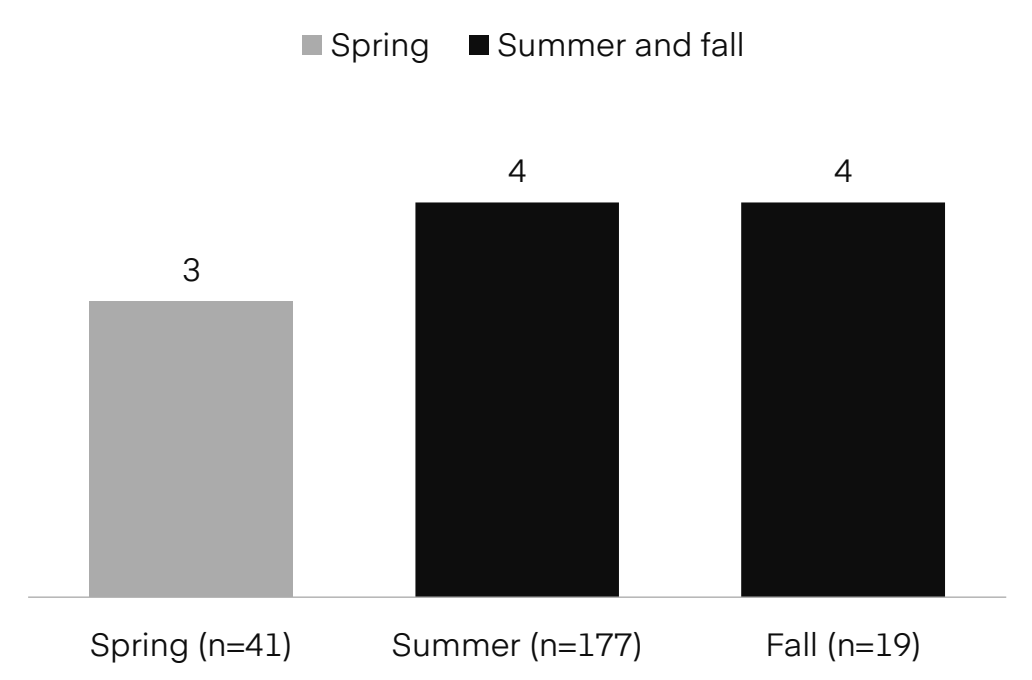
TRIP PROFILE BY SEASON

Summer and fall overnight guests stay a night longer than spring guests

Stayed overnight



Median nights, overnight guests

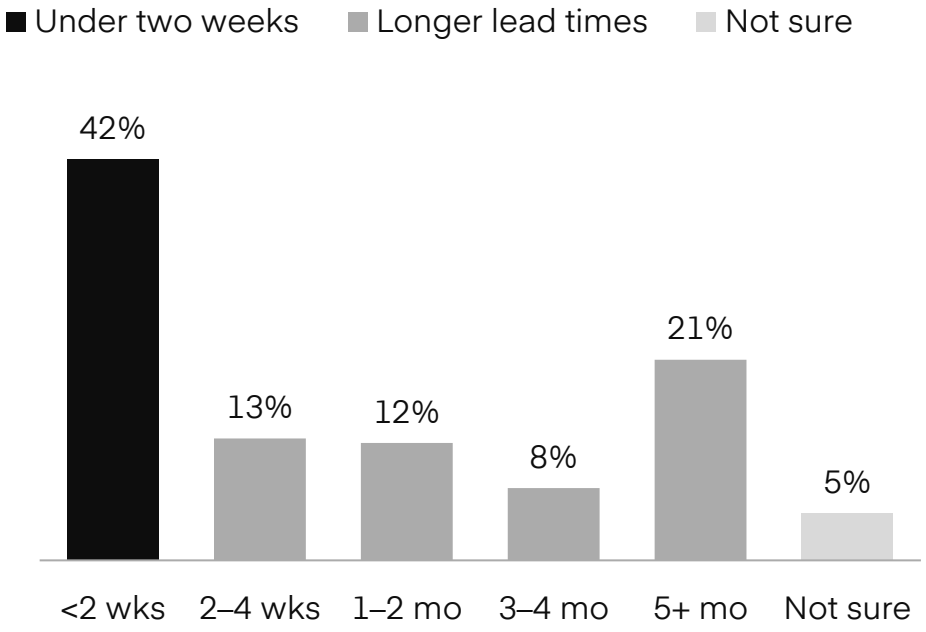


Share of visitors who stayed overnight (n=78, 303, 38); median nights among overnight guests, 2026.

Winter is not shown: seven visitors, four of them overnight. Fall bases are low (38 visitors, 19 overnight), so fall results are directional. Medians are read from the nights distribution.
Source · 2026 Visitor Survey (CRG), unweighted · Q4, Q4A, Q1B.

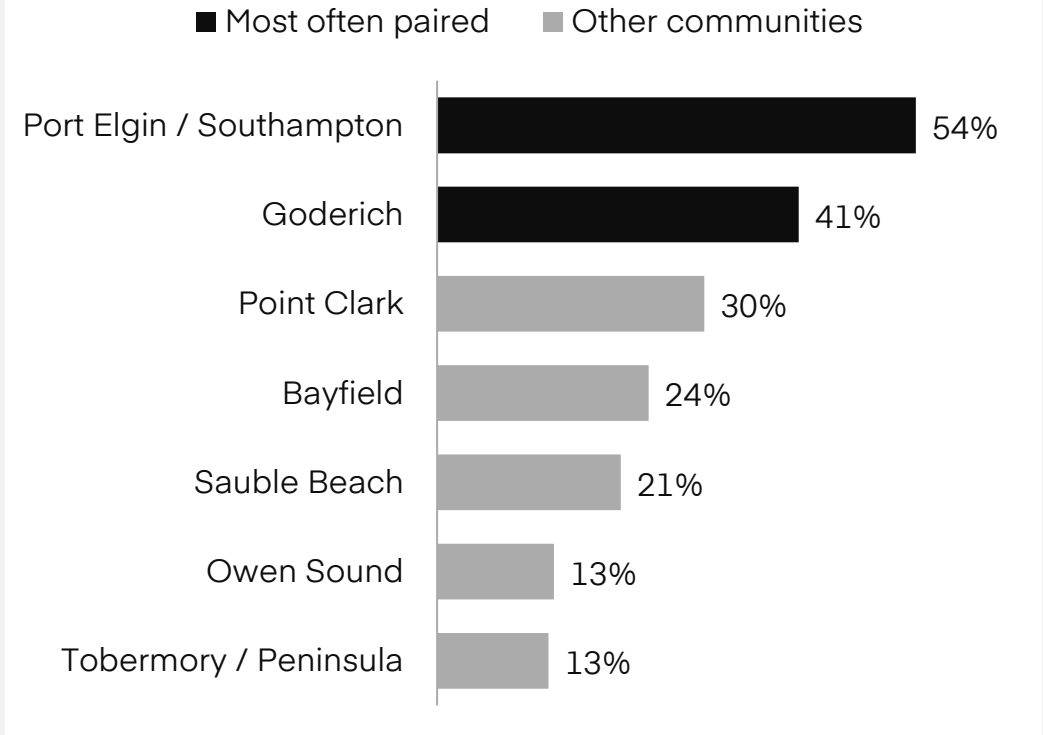
PLANNING THE TRIP

Four in ten visitors start planning less than two weeks out



How far ahead the visit was planned, share of visitors, 2026 (n=426).

62% come for Kincardine alone; the rest pair it with Port Elgin or Goderich



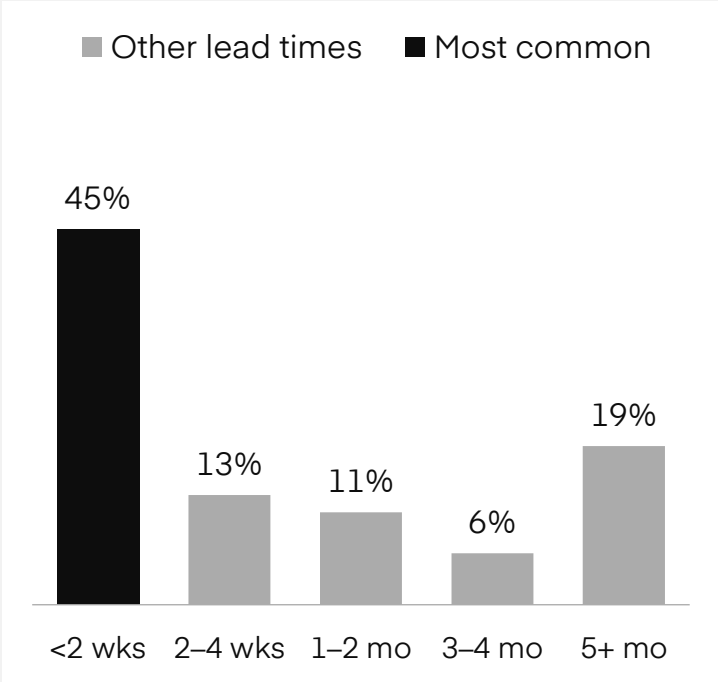
Other communities visited, share of the 38% who combined trips (n=159).

Source · 2026 Visitor Survey (CRG), unweighted · Q9A, Q6, Q6A.

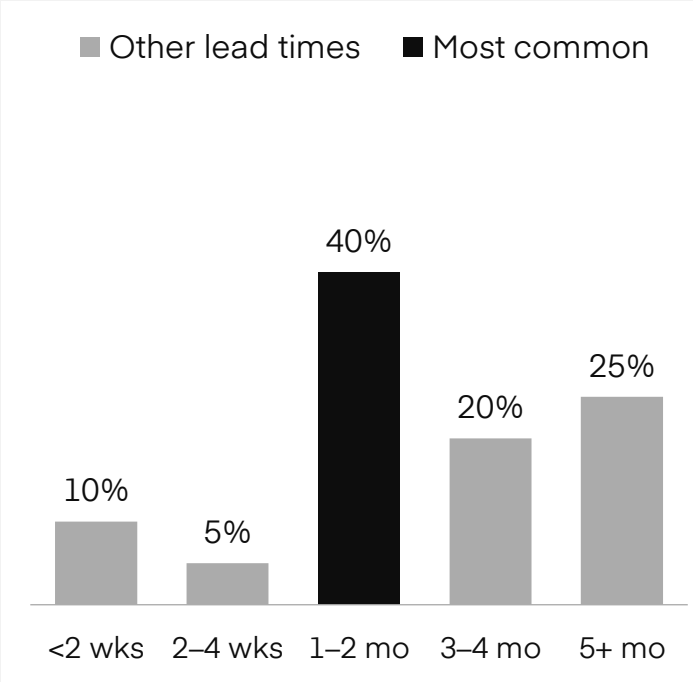
PLANNING BY PLACE OF RESIDENCE

Ontario visitors decide late; visitors from other provinces and the US plan months ahead

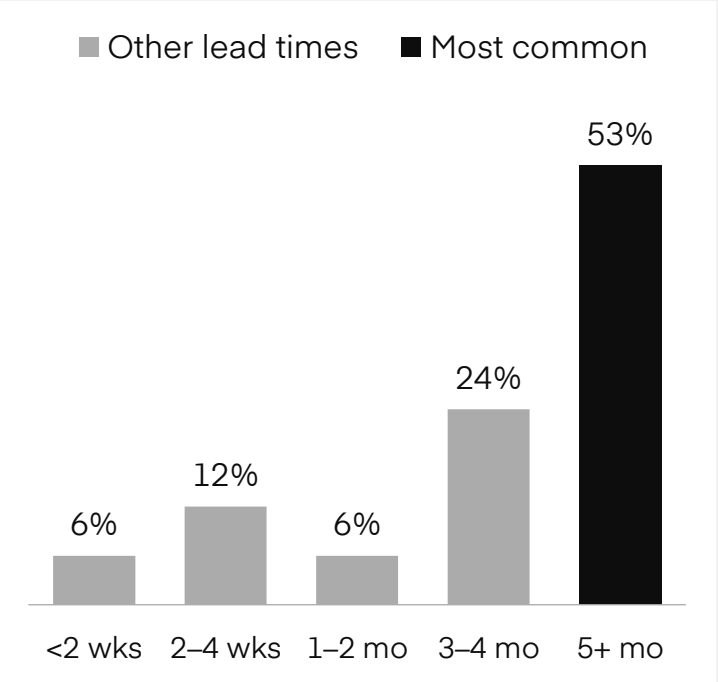
Ontario (n=387)



Another province (n=20) · directional



United States (n=17) · directional



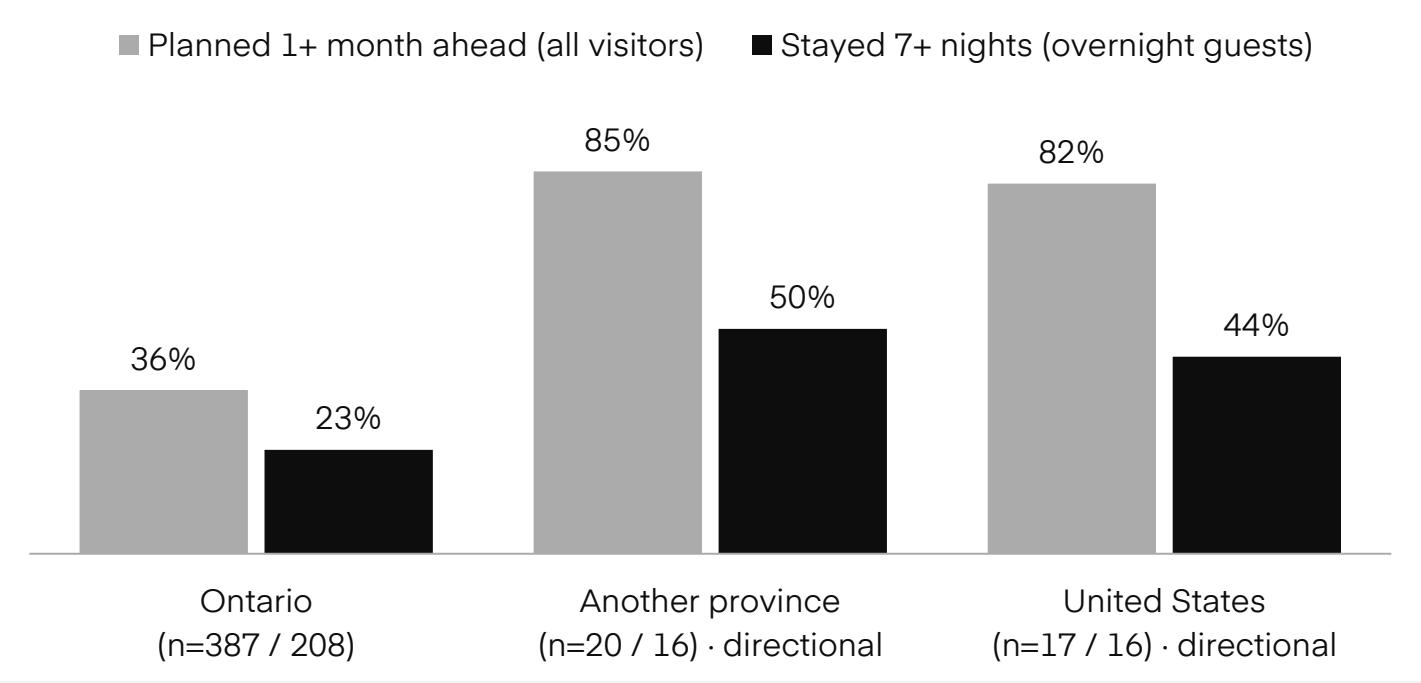
How far ahead the visit was planned, by where visitors live, 2026. “Not sure” not shown (5% of Ontario visitors).

Out-of-province and US bases are small (20 and 17 visitors), so those results are directional. The survey does not split planning by Ontario region.
Source · 2026 Visitor Survey (CRG), unweighted · Q9A, Q1VIS.

PLANNING AHEAD & LENGTH OF STAY

Visitors who come from further away plan earlier and stay longer: half of out-of-province overnight guests stay a week or more

Planned a month or more ahead, and stayed a week or more



Median nights, overnight guests

3

Ontario (n=208)

6–7

Another province (n=16) · directional

6

United States (n=16) · directional

Planning: all visitors, Q9A (1+ month = 1–2, 3–4 or 5+ months ahead). Nights: overnight guests, Q4A. Bases shown as planning / nights.

A comparison of groups from the published tables, not of individual visitors. Out-of-province and US bases are small, so those results are directional.
Source · 2026 Visitor Survey (CRG), unweighted · Q9A, Q4A, Q1VIS.

EVENTS: ATTENDEES & ORIGIN

69%
Repeat attendees, Blues Festival 2026

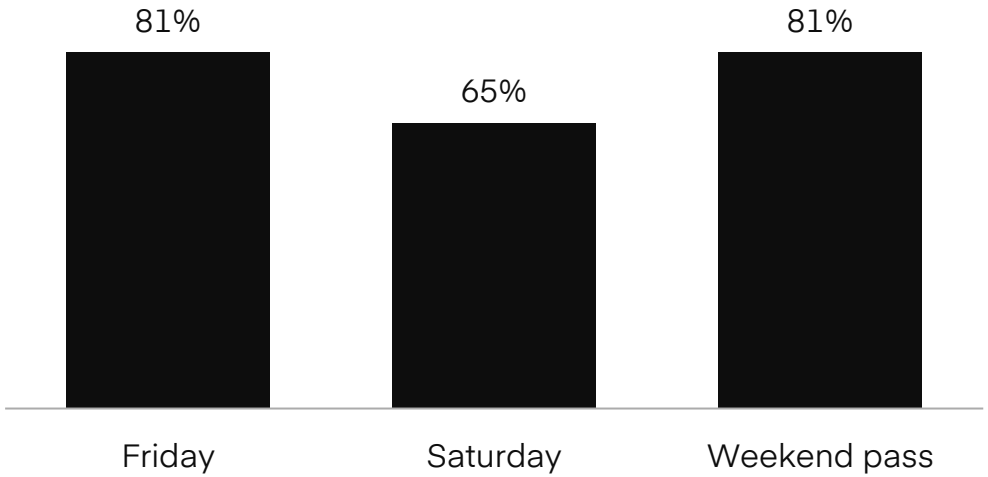
92%
Likely to return to the festival

10,000
Estimated attendance[1]

Most Blues Festival tickets are bought outside Kincardine, and seven in ten attendees have been before

Attendee profile, as published	Lighthouse Blues Festival 2026
Typical attendee	Age 53, household income $154,000, half with children
Kincardine share of tickets	19% Friday; 35% Saturday; 19% weekend pass
Non-local markets	London 18.5%, then Waterloo

Attendee profile as published by the organizers. Nothing is published for the Scottish Festival or Canada Day.



Share of Blues Festival tickets bought by people who live outside Kincardine, by ticket day, 2026.

1. Estimate provided in August 2026. No Kincardine event publishes a total attendance count.
Source · Lighthouse Blues Festival 2026 Economic Impact Report.

PILLAR 2: ECONOMIC IMPACT

What the visitor economy is worth in businesses, jobs, wages and spending.

PILLAR 2: ECONOMIC CONTRIBUTION

Subdomain	Indicator	Baseline (latest published)	Baseline source
Businesses, jobs & wages	Tourism-related employment ★	702 jobs (2025)	The Municipality's published figure; the basis is defined on How to read this Profile
	Tourism business locations ★	68 locations (Jun 2025)	Lightcast business-location bands, Kincardine CSD
	Wages and labour income ★	$14.5M direct wages (2023)	Lightcast input-output model, reference year 2023
Spending & economic contribution	Tourism business sales ★	$74.3M direct sales (2023)	Input-output model. Business revenue from every customer, residents and contractors included. Not visitor spending.
	Visitor spending, destination-wide ★	$1,020 per travel party per trip, mean (2026)	2026 Visitor Survey, n=426, five extreme answers removed
	Event visitor spending ★	$2.33M (Blues Festival 2026)	TREIM, run by the festival's consultants. One event, modelled, not destination-wide.
	Total tourism spending (destination-wide, visitor-only) ★	$43.8M a year (2026)	CRG estimate: survey spend per party × about 65,800 travel parties, built season by season. Modelled, not measured.
	Tax revenue attributable to tourism	$11.7M a year to all governments (2026)	TREIM, Bruce County, on the same estimate. The Municipality's own share is unknown.
	GDP supported by visitor spending	$28.2M in Bruce County (2026)	TREIM, Bruce County, on the same estimate. The value that stays in Bruce County.
	Tax revenue per travel party	$277 per trip; $24 "municipal" (2026)	TREIM, Bruce County, on $1,020 spend per party. The $24 covers every Bruce County municipality.

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

Items not yet collected are listed in the appendix.
Source · Municipality of Kincardine, Tourism Economic Impacts 2026 · Lightcast via McSweeney / BCED · 2026 Visitor Survey (CRG), unweighted · Lighthouse Blues Festival 2026 Economic Impact Report (TREIM) · CRG TREIM run, Bruce County, 2026.

TOURISM EMPLOYMENT & BUSINESS COUNTS

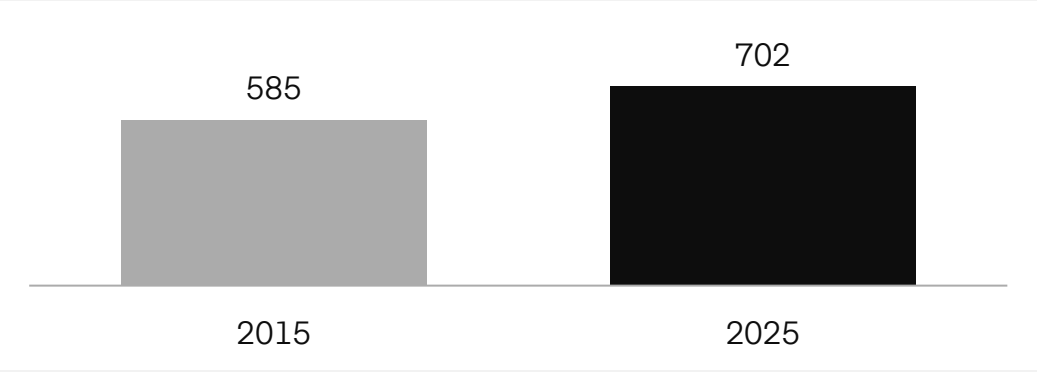
4.3%
Tourism share of all jobs, Lightcast's own count (2025)[1]

702
Tourism jobs, Municipality published[2]

68
Tourism business locations (Jun 2025)

4.2%
Tourism share of all business locations

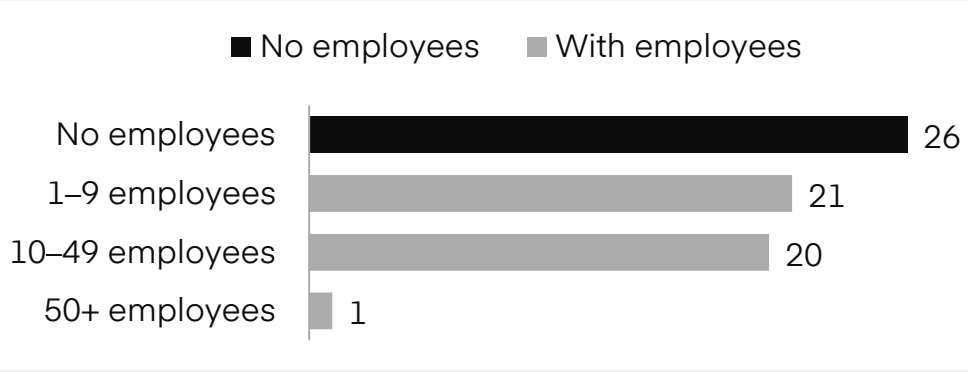
Tourism jobs grew 20% over the decade, from 585 to 702



Tourism jobs, Municipality of Kincardine (published).

Tourism jobs, Municipality of Kincardine	2015	2025	Decade growth
Total tourism jobs[2]	585	702	+20%

Almost two in five of Kincardine's 68 tourism businesses (26) have no employees



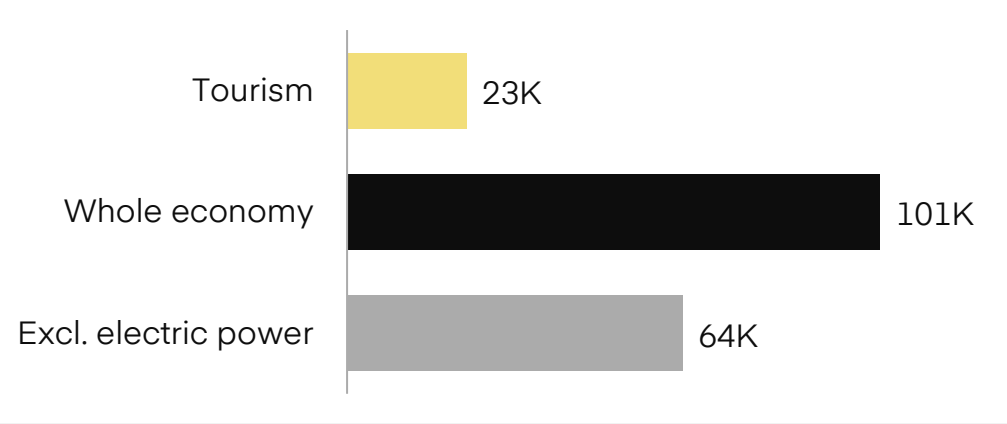
Tourism business locations by size band, Kincardine CSD, Jun 2025.

Cross-check on business counts	Locations	Share
Lightcast, Jun 2025 (place of work)	68 of 1,610	4.2%
TourismScapes, Census 2021 (residence)	58 of 1,557	3.7%

1. Lightcast via McSweeney / BCED, Q3 2025, place of work. 7% excluding NAICS 2211 electric power generation. On the Municipality's 702 the shares read 5% and 8%.
2. Municipality of Kincardine, Tourism Economic Impacts 2026. Basis defined on How to read this Profile. Business locations: Lightcast Jun 2025; comparator Canadian Tourism Data Collective.

TOURISM REVENUE & SHARE OF THE ECONOMY

Tourism's average wage is about a fifth of the Kincardine average



Average wage per job, Kincardine CSD, input-output 2023.

Average wage per job (2023)	Tourism	Whole economy	Excl. electric power
CAD	$22,600	$101,200	$63,700

The model counts jobs, not full-time equivalents, so seasonal and part-time work pulls the tourism average down. Two in five Kincardine jobs sit in electric power generation, which is why the third column is the closer comparison.

Tourism business revenue from all customers (residents, visitors and Bruce Power contractors)

Kincardine CSD, Input-Output year 2023	Direct	Indirect + induced	Total
Business sales (CAD)	$74.27M	$10.79M	$85.06M
Wages (CAD)	$14.53M	$2.02M[1]	$16.55M
Jobs	642[2]	47	689

0.9% of all Kincardine business sales, or 3.3% excluding NAICS 2211 electric power generation. Exports, meaning sales outside Kincardine, are $40.8M.

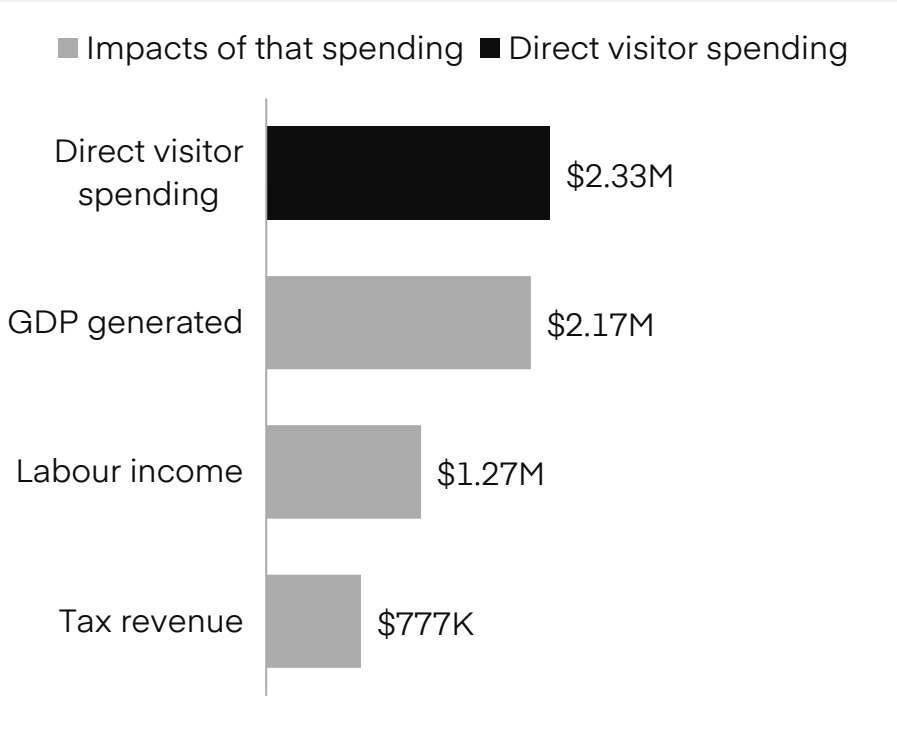
Location quotient, tourism employment[3]	vs Ontario	vs Canada
Census 2021, all industries	0.58	0.52
Excluding electric power generation	1.08	0.96

A quotient above 1.0 means tourism employs a larger share of the workforce in Kincardine than in the benchmark economy.

1. Computed indirect wages ($2.02M) against the published $2.1M total-minus-direct, about 4% apart on rounding or multiplier treatment.
2. A third jobs figure on a third reference year (input-output 2023); it is not comparable with the 2015/2025 series. The 2026 infographic publishes 111 indirect jobs.
3. Location quotient: Census 2021, place of work, tourism as NAICS 71 and 72.

EVENT ECONOMIC IMPACT: BLUES FESTIVAL 2026

The 2026 festival is modelled at $2.33M of direct visitor spending



Lighthouse Blues Festival 2026, single-event modelled impact (CAD).

Measure (2026, single event)	Value (CAD)
Direct visitor spending	$2,330,000
GDP generated	$2,170,000
Labour income	$1,270,000
Tax revenue, all levels of government	$777,000
Jobs supported	21 jobs
of which accommodation direct GDP	$229,000
of which food & beverage direct GDP	$192,000

CRG cross-check: the report's ticket-origin shares and spend bands, per spending party

Ticket origin × spend band, per party of 3.2	Value (CAD)
Local, 24% of tickets × $125	$95,000
Overnight, 56% × $750	$1,306,000
Long distance, 20% × $1,500	$938,000
Total	**$2,338,000**
Municipal investment	Not yet available
Return on investment	Not yet available

Spend bands are per spending party, not per head; applied per attendee they would return 3.2 times the report's own TREIM figure. Attendance (10,000) is an estimate provided in August 2026.
Source · Kincardine and surrounding area (event-based) · Lighthouse Blues Festival 2026 report (TREIM) · CRG model.

VISITOR SPENDING

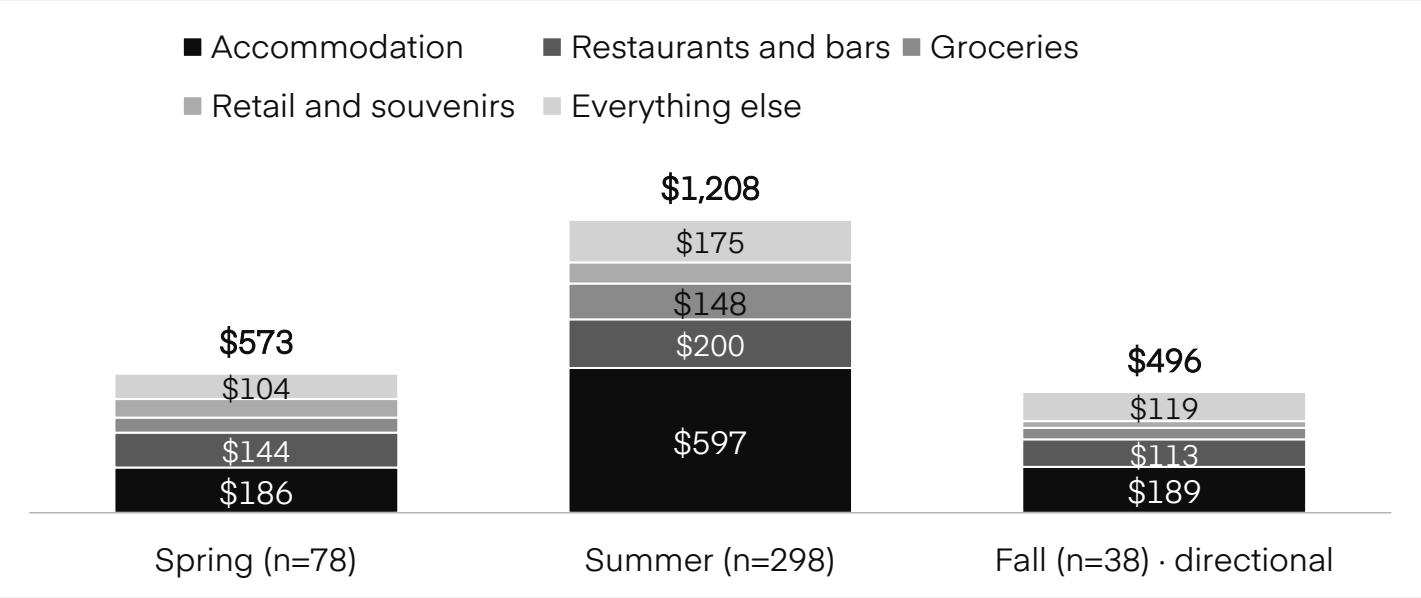
$1,020
Average party spend per trip[1]

$301
Per person per trip[2]

47%
Of party spend on accommodation

18%
On restaurants, cafés and bars

A summer trip costs about $1,200, twice a spring or fall trip, and most of the difference is accommodation



Average spend per party per trip, by season and category, CAD, 2026 (Q17 bases). Winter not shown (n=7); fall is directional. Segments under $90 are not labelled.

Summer minus spring: $635

$411 of the gap is accommodation (65%).

Summer minus fall is $711, and $408 of that is accommodation (57%).

Spring and fall visitors are more likely to stay with friends or family (see Where overnight visitors stay).

1. Means per travel party, day trips included; five extreme single answers removed, so no respondent is dropped (n=426). 71% of respondents visited in July or August. 2. Average party spend divided by the average party size of 3.4. Everything else: transport and parking, recreation, food trucks, farm stands and other.
Source · 2026 Visitor Survey (CRG), unweighted · Q17, Q3, Q1B, Q4B.

PILLAR 3: ACCOMMODATION CAPACITY & DEMAND

How much accommodation the Municipality of Kincardine has, how full it is, and where overnight visitors stay.

PILLAR 3

PILLAR 3: ACCOMMODATION CAPACITY & DEMAND

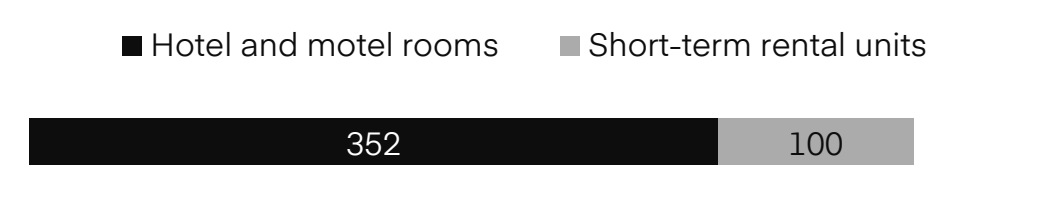
Subdomain	Indicator	Baseline (latest published)	Baseline source
Accommodation supply	Accommodation supply: rooms available ★	352 hotel and motel rooms a night (2025)	McSweeney and Associates, MAT Model (May 2025)
	Short-term rental supply and trends ★	81 to 100 short-term rentals	AirROI since 2021; Avenu Insights / Harmari, 3 March 2025
Accommodation demand	Short-term rental occupancy ★	41% (12 months to Aug 2026)	AirROI, 12 months to Aug 2026
	Short-term rental nightly rate ★	$279 (12 months to Aug 2026)	AirROI, 12 months to Aug 2026
	Hotel and motel occupancy (regional context)	55% (RTO7 region, 2012–2022 average)	McSweeney MAT Model, RTO7 data 2012–2022
	Hotel and motel nightly rate (regional context)	$129 (RTO7 region, 2012–2022 average)	McSweeney MAT Model, RTO7 data 2012–2022
	Business-reported capacity utilization	66% of businesses at or near capacity in peak season (2026)	2026 Business Survey (CRG), n=32, directional

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

The hotel and motel figures are RTO7 regional averages used in the McSweeney MAT model, not Kincardine measurements. Items not yet collected are listed in the appendix.
Source · McSweeney and Associates, MAT Model, May 2025 · Avenu Insights / Harmari, 3 March 2025 · AirROI, September 2026 · 2026 Business Survey (CRG).

ACCOMMODATION & SHORT-TERM RENTAL SUPPLY

Short-term rentals are about a fifth of overnight capacity: 100 of 452 units

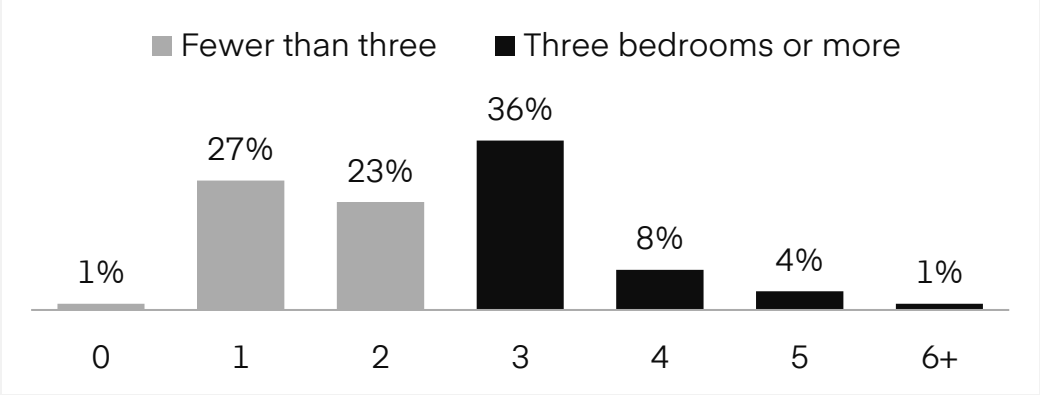


Units available a night, Municipality of Kincardine, 2025.

Accommodation supply	Units a night
Hotel and motel rooms	352
Short-term rental units	100
Total units a night	**452**

AirROI counts 81 active Airbnb and Vrbo listings a month over the last 12 months, below the sweep's 100 unique rentals. The sweep counts every listing it can find, dormant ones included, so the two are not combined.

Half of Kincardine's short-term rentals have three bedrooms or more



Share of 167 mapped listings by bedroom count, 3 March 2025.

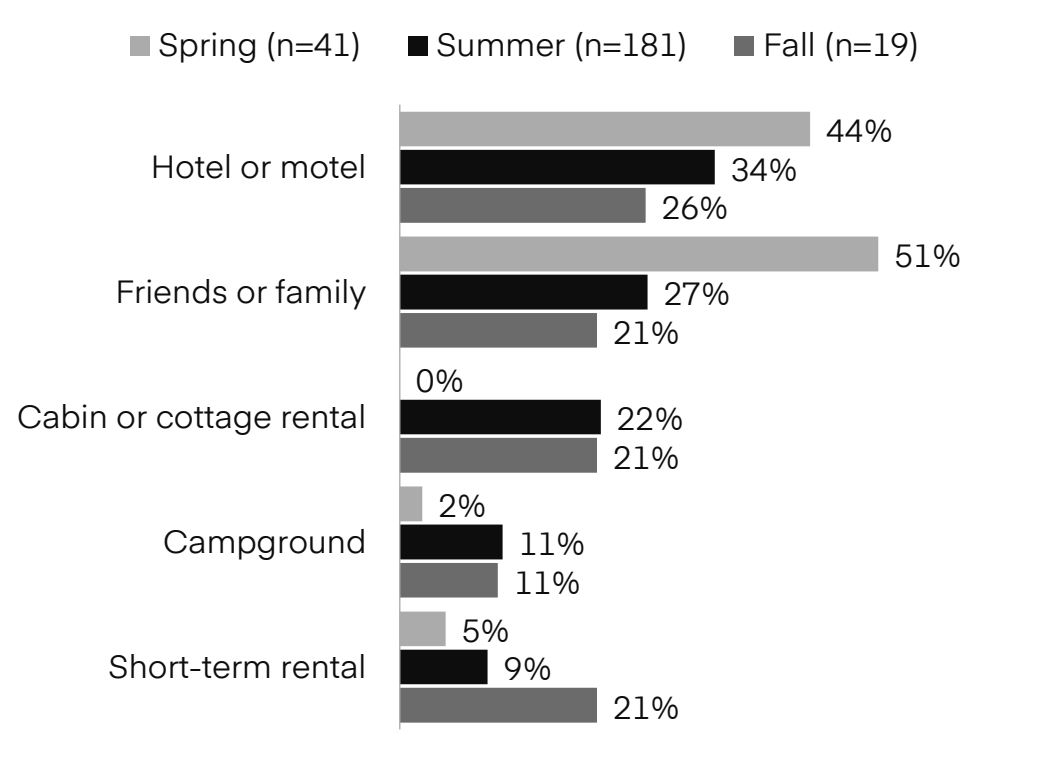
75% of listings are whole houses and 89% of operators list a single property: family homes, not commercial stock. 96% could not be tied to an address.

Short-term rentals, 3 March 2025	Value
Listings mapped	167
Estimated unique rentals	100
Entire-home listings	125
Shared-home listings	42
Occupancy vs national average (AirDNA)	1.0×
Revenue per room vs national average (AirDNA)	1.3×

Hotel and motel rooms: McSweeney and Associates estimate from conversations with local operators. Short-term rentals: Avenu Insights / Harmari sweep of all platforms on 3 March 2025, a winter snapshot that understates peak supply; one listing counts as one unit.
Source · McSweeney and Associates, May 2025 · Avenu Insights / Harmari, 3 March 2025 · TourismScapes (AirDNA 2024) · AirROI, September 2026.

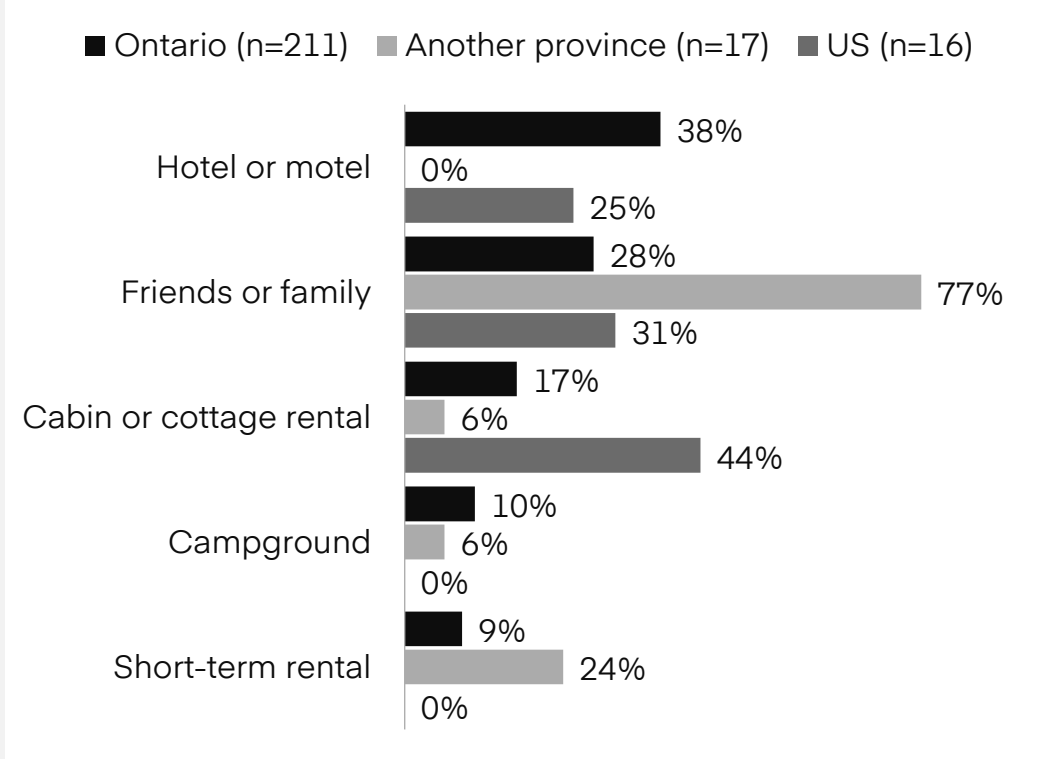
WHERE OVERNIGHT VISITORS STAY

Half of spring guests stay with friends or family; summer brings the cottage and campground stays



Where overnight visitors stayed, by season of visit, 2026 (more than one answer allowed).

Ontario visitors fill the hotels; three in four visitors from other provinces stay with friends or family

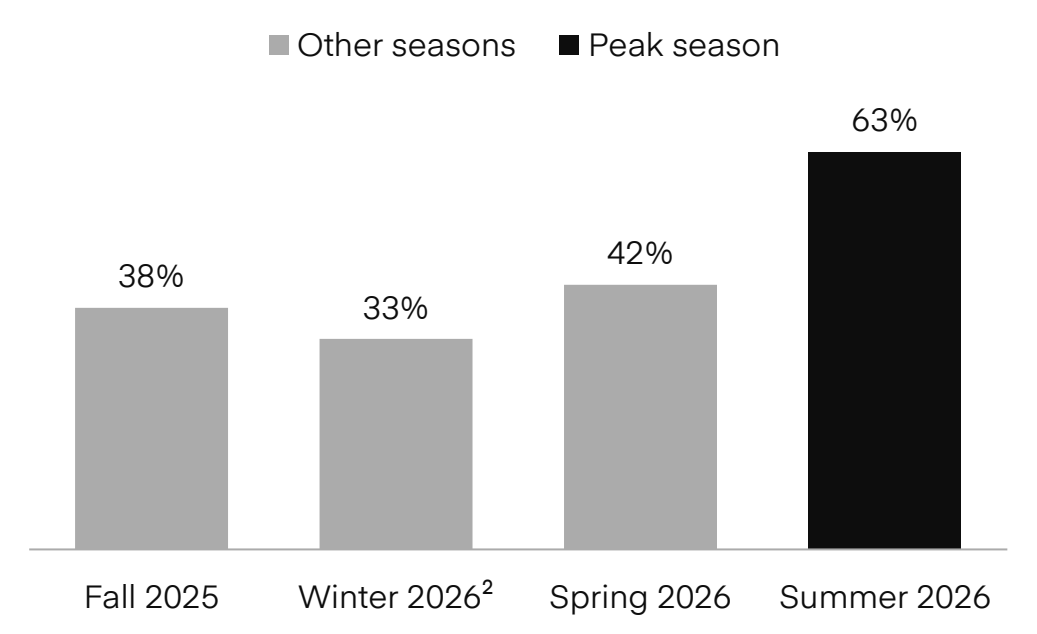


Where overnight visitors stayed, by where they live, 2026 (more than one answer allowed).

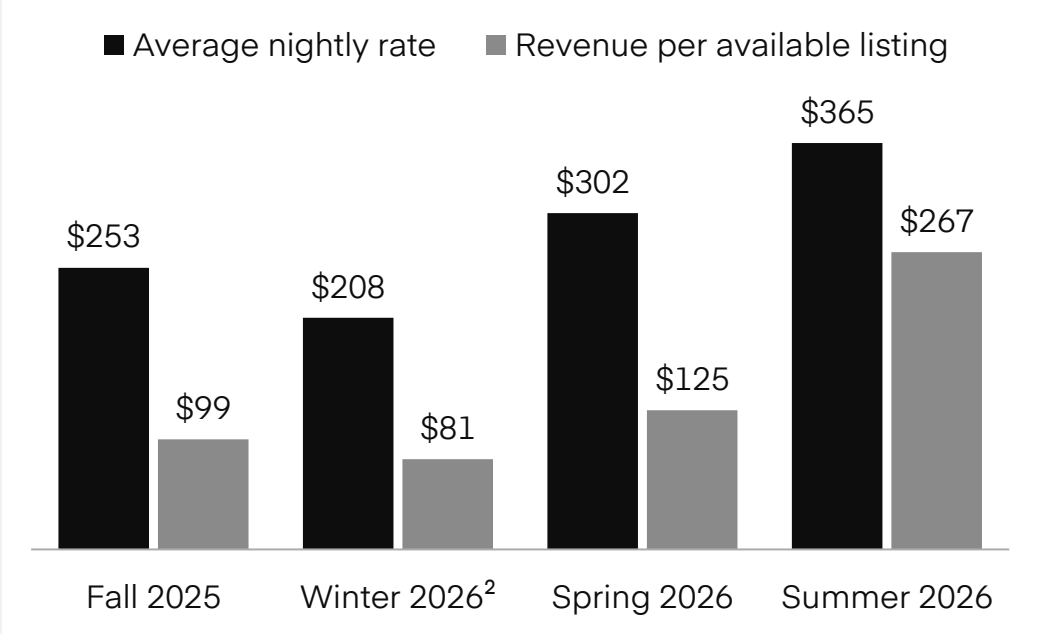
Winter (four overnight guests) not shown. Fall, out-of-province and US bases are under 20, so those results are directional. Stays with friends or family never appear in accommodation data.
Source · 2026 Visitor Survey (CRG), unweighted · Q4B, Q1B, Q1VIS.

ACCOMMODATION: STR PERFORMANCE BY SEASON

Summer runs at 63% occupancy and $267 revenue per available listing, compared to $81 revenue per available listing in winter



Short-term rental occupancy by season, September 2025 to August 2026[1].

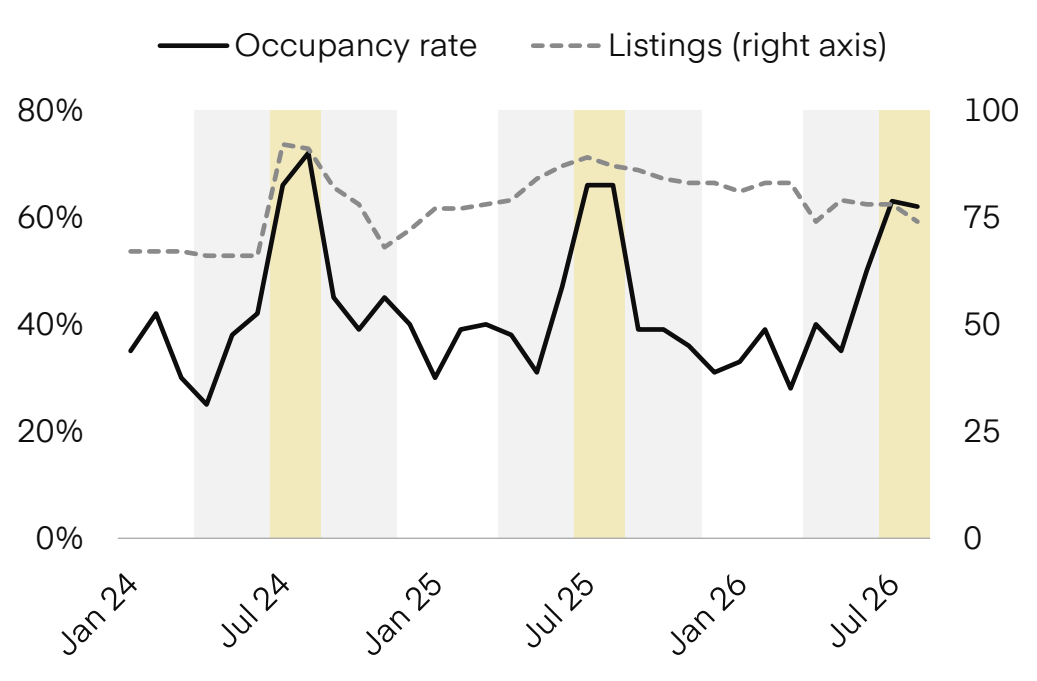


Nightly rate and revenue per available listing by season, CAD[1].

1. AirROI, approximately the Municipality of Kincardine CSD, pulled 18 September 2026, CAD. Occupancy and revenue per listing weighted by available listing nights; nightly rate by booked nights. Revenue per listing is AirROI's reported figure and runs above occupancy × nightly rate.
2. Winter is the four months inside one calendar year, so Winter 2026 is January to March only. Airbnb and Vrbo listings only, not a census.

ACCOMMODATION: STR OCCUPANCY & PEERS

Since 2024, listings grew by about a tenth while bookings held flat, so occupancy slipped from 45% to 41%



Monthly occupancy (left axis) and active listings (right axis), Jan 2024 to Aug 2026. Shading: yellow summer, grey spring and fall, white winter.

Market	Occupancy	Nightly rate	RevPAR	Listings
Kincardine	**41%**	**$279**	**$124**	**81**
Saugeen Shores	41%	$291	$125	191
South Bruce Peninsula	34%	$352	$126	331
Goderich	35%	$332	$115	37
Collingwood	42%	$269	$113	211

Peer markets, trailing 12 months to August 2026, CAD[1].

1. AirROI, pulled 18 September 2026, CAD. Occupancy weighted by available listing nights; nightly rate by booked nights. Airbnb and Vrbo listings only. Peer markets are AirROI's settlement markets grouped into municipalities.
Source · AirROI, September 2026.

PILLAR 4: VISITOR EXPERIENCE & SATISFACTION

Whether visitors enjoyed the Municipality of Kincardine, what they would change, and whether they intend to come back.

PILLAR 4

PILLAR 4: VISITOR EXPERIENCE & SATISFACTION

Subdomain	Indicator	Baseline (latest published)	Baseline source
Satisfaction & intent	Visitor satisfaction score (composite) ★	92% satisfied with their visit	2026 Visitor Survey (CRG)
	Likelihood to recommend (NPS-style) ★	Net Promoter Score +66	2026 Visitor Survey (CRG)
	Return intent ★	91% likely to return in summer	2026 Visitor Survey (CRG)
	Off-season visit drivers	More events or festivals, 38%	2026 Visitor Survey (CRG), n=296
	Visitor pain points and complaints	Transportation, 22% dissatisfied	2026 Visitor Survey (CRG)
	Rating against other destinations	75% rate Kincardine above other lakefront places	2026 Visitor Survey (CRG)
	Cultural and heritage participation	32% attended a Scottish event	2026 Visitor Survey (CRG)

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

Online review ratings and volume are not collected yet and are listed in the appendix.
Source · 2026 Visitor Survey (CRG), unweighted, 426 respondents.

SATISFACTION & RECOMMENDATION

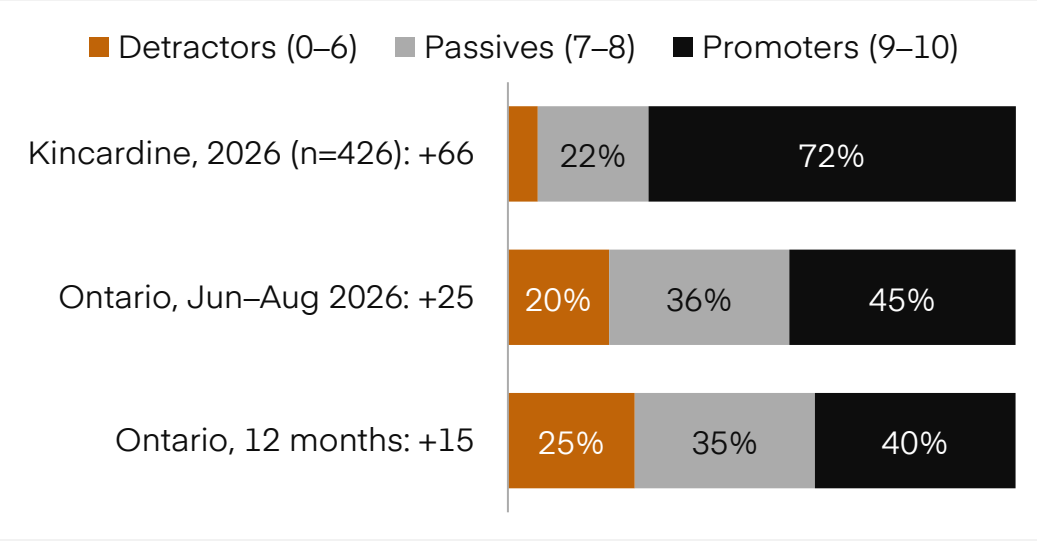
92%
Satisfied with their visit

+66
Net Promoter Score

83%
Rate value for money good

75%
Rate it above other lakefront destinations

Kincardine's +66 is about 40 points above Ontario's summer score



Likelihood to recommend, 0–10, with the Net Promoter Score after each label. Ontario: Ontario residents aged 25–64 rating Ontario as a destination (OTTM Q4).

Visitors rate Kincardine at or above Ontario's image on everything but transportation

Aspect of the visit	Satisfied	Ontario travellers agree Ontario…	Agree
Beaches, outdoor recreation	97% · 91%	has great natural attractions	90%
Friendliness of residents	92%	is friendly and inclusive	88%
Events and entertainment	89%	provides lots of things to do	88%
Value for money	83%	provides good value for money	74%
Transportation	**56%**	**has good travel infrastructure**	**81%**
Overall	92%	(rated 4 or 5 out of 5 overall)	86%

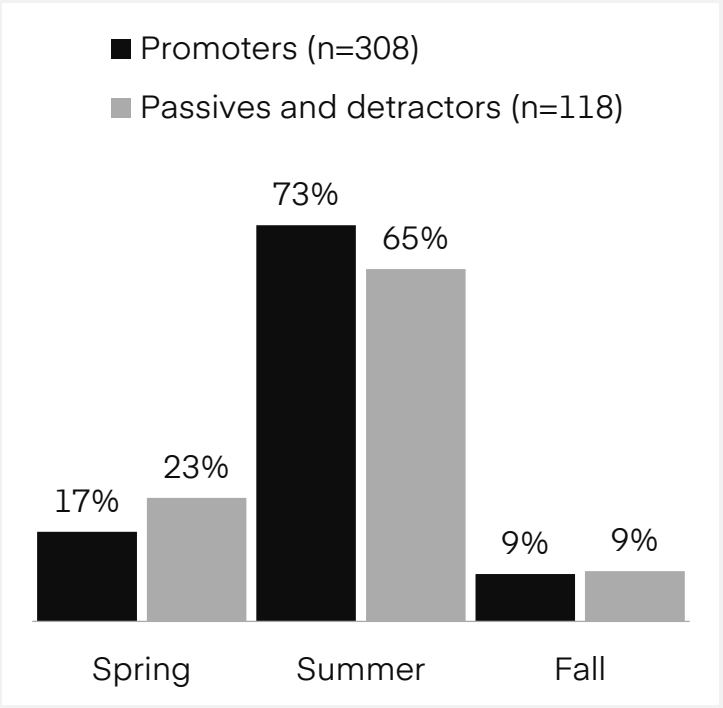
Kincardine: top 2 of 5 (Q12, Q13, Q18). Ontario: top-2 agreement (Q5, Q6) or rating (Q3), Jun–Aug 2026. Eight of the fourteen aspects score 90% or higher.

Kincardine asks its visitors about Kincardine; OTTM asks Ontario residents aged 25–64 about Ontario, travelled or not. Same NPS question, different subject, so Ontario is a benchmark rather than a like-for-like score. Satisfaction and agreement are different measures, shown side by side for context.
Source · 2026 Visitor Survey (CRG), unweighted · Q12, Q13, Q16, Q18, Q21 · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM), Ontario market · Q3, Q4, Q5, Q6.

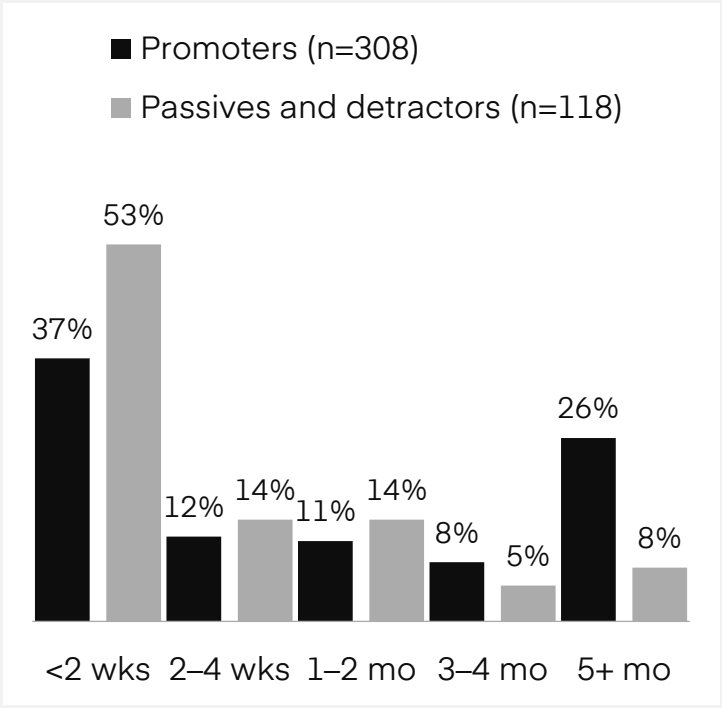
WHAT SETS PROMOTERS APART

Promoters are likelier to come in summer, plan months ahead and spend half as much again per trip

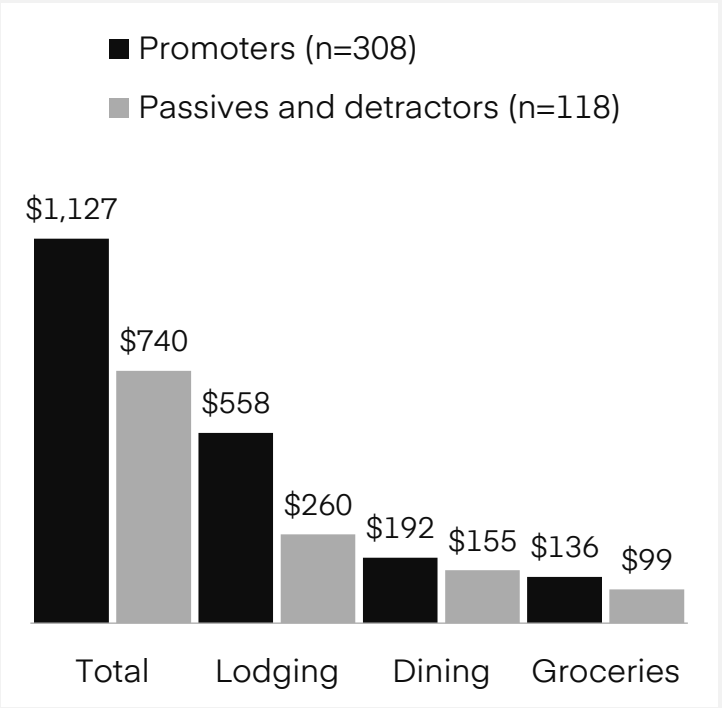
When they came



How far ahead they planned



Spend per party per trip, CAD

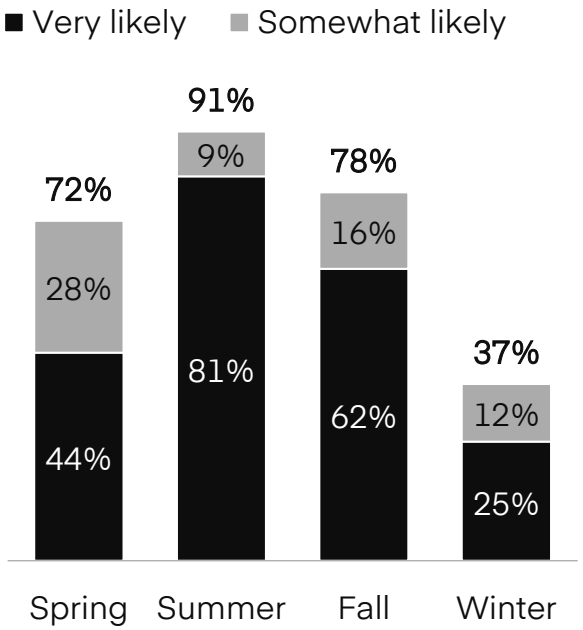


Promoters rate their likelihood to recommend Kincardine 9 or 10 out of 10; passives and detractors rate it 0 to 8.
Source · 2026 Visitor Survey (CRG), unweighted · Q16, Q1B, Q9A, Q17.

RETURN INTENT BY SEASON

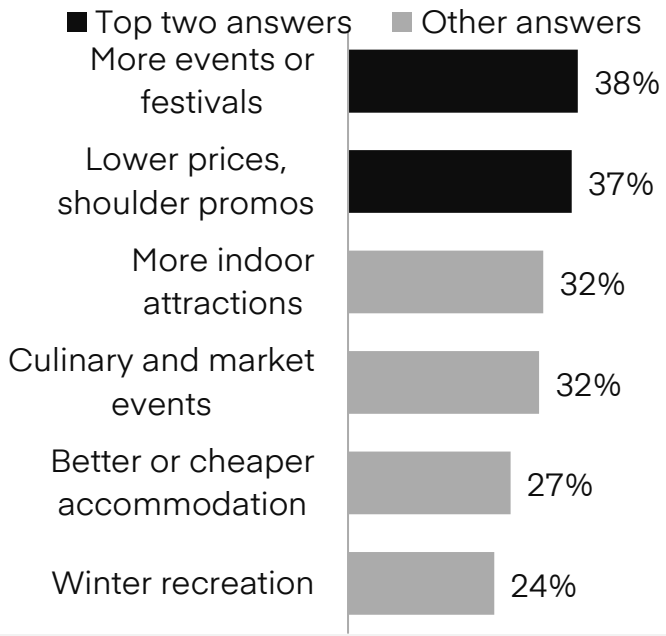
Nine in ten plan a summer return and fewer than four in ten a winter one; Ontario's winter travellers plan dining, shopping and festivals well ahead of snow sports

Likely to return in the next two years, by season



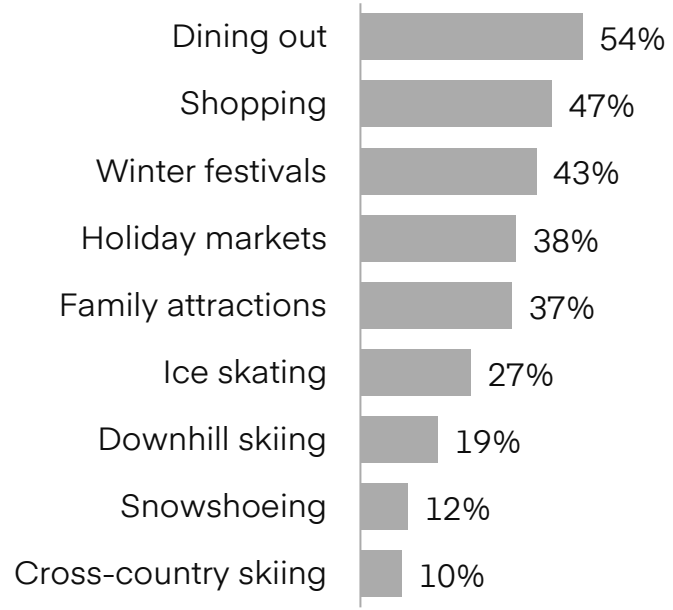
Likely to return in the next two years, by season, 2026 (n=384). Bold figure above each column is the top 2 share.

What would make a fall or winter visit more appealing



What would make a fall or winter visit more appealing, share of visitors (n=296, more than one answer allowed).

Ontario travellers: what they plan to do on a winter trip



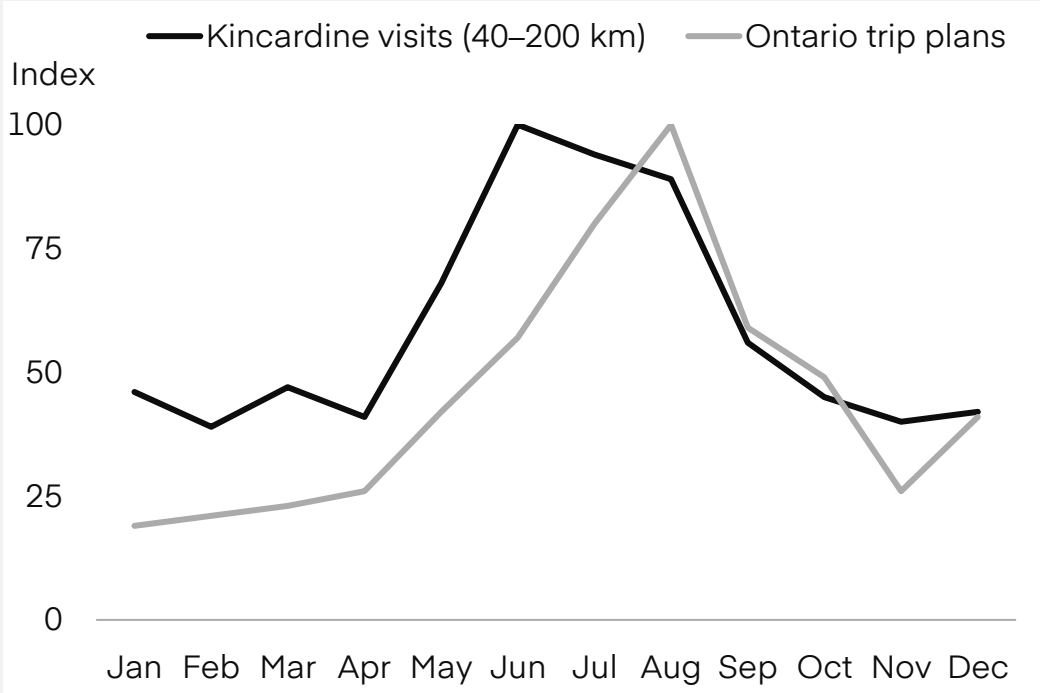
Ontario residents aged 25–64 planning a winter trip in Ontario, Sep 2025 to Aug 2026 (OTTM Q1BA, more than one answer).

Source · 2026 Visitor Survey (CRG), unweighted · Q11, Q11C · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM), Ontario market · Q1BA.

ONTARIO BENCHMARK: THE FALL MARKET

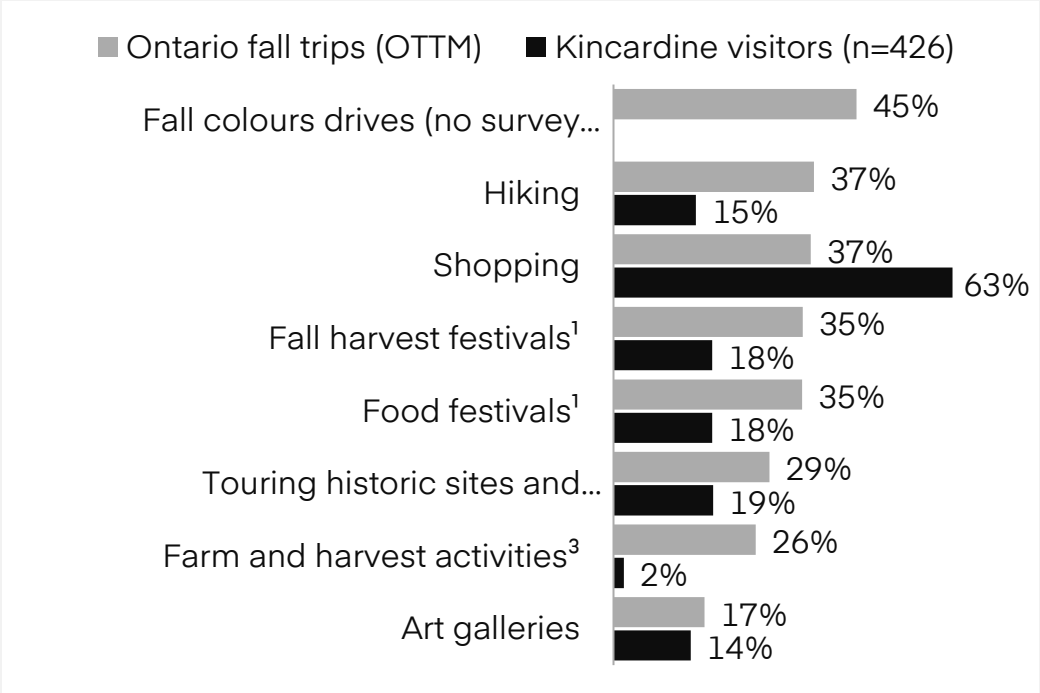
Kincardine's visits drop after August at almost the same rate as Ontario's trip plans; Ontario's fall travellers plan festivals, harvest events and hikes, which draw fewer Kincardine visitors today

Visits and trip plans by month (peak month = 100)



September: Kincardine 56, Ontario 59. October: 45 and 49. Ontario line: months in which trips are planned (OTTM S6BB).

Ontario fall trip plans, against what Kincardine visitors did



Ontario: fall trip plans in Ontario (OTTM Q1BC, 12 months). Kincardine: activities during the visit, all visitors (Q7, n=426). More than one answer allowed.

1. Kincardine pairing: "concert, festival or major event". 2. Kincardine pairing: "museum or historic site". 3. Kincardine pairing: "agrotourism experience". Left chart: counted visits against planned months, so only the shape is compared.
Source · Environics Analytics geofence via RTO7, 2025 · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM), Ontario market · S6BB, Q1BC · 2026 Visitor Survey (CRG), unweighted · Q7.

PILLAR 5: RESIDENT SENTIMENT

How residents experience tourism where they live: whether they support it, what it costs them, and how much more of it they want.

PILLAR 5

PILLAR 5: RESIDENT SENTIMENT

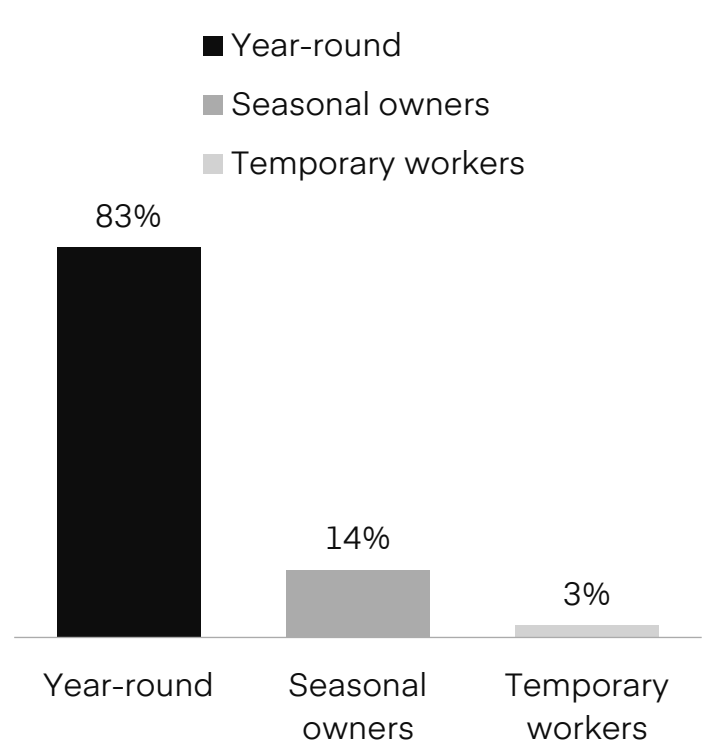
Subdomain	Indicator	Baseline (latest published)	Baseline source
Attitudes to tourism	Resident support for tourism (favourable / unfavourable)	52% positive about tourism	2026 Resident Survey (CRG), weighted
	Perceived benefits vs impacts	78% agree with pressures vs 67% with benefits	2026 Resident Survey (CRG), weighted
	Tolerance for tourism growth	49% say current tourism is about right	2026 Resident Survey (CRG), weighted
	Community pride	65% say tourism adds to community pride	2026 Resident Survey (CRG), weighted
Pressures & concerns	Key resident concerns (traffic, housing, environment)	Parking: 84% say tourism puts pressure on it	2026 Resident Survey (CRG), weighted
	Seasonal sentiment shifts	41% say life is worse in July and August	2026 Resident Survey (CRG), weighted
	Resident-perceived infrastructure strain	37% say infrastructure keeps pace in peak season	2026 Resident Survey (CRG), weighted
Voice & participation	Resident voice in tourism governance	33% say the Municipality weighs residents well	2026 Resident Survey (CRG), weighted
	Ideas from residents	Family attractions, 66%	2026 Resident Survey (CRG), weighted
Community & place	Quality of life rating	78% rate quality of life 4 or 5 out of 5	2026 Resident Survey (CRG), weighted
	Sense of community belonging and resident–visitor relations	72% feel a strong sense of belonging	2026 Resident Survey (CRG), weighted

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

Source · 2026 Resident Survey (CRG), weighted, 713 respondents.

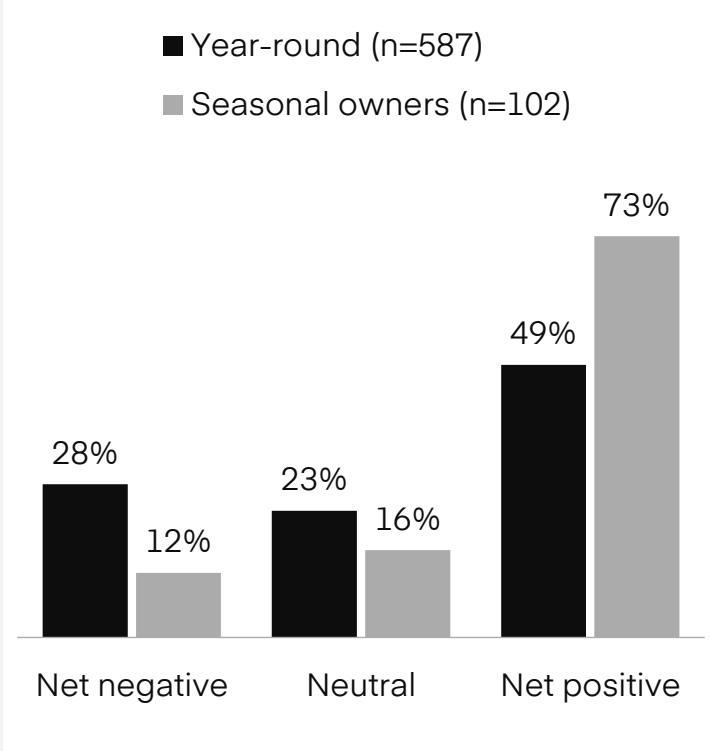
SUPPORT FOR TOURISM

Most respondents are year-round residents



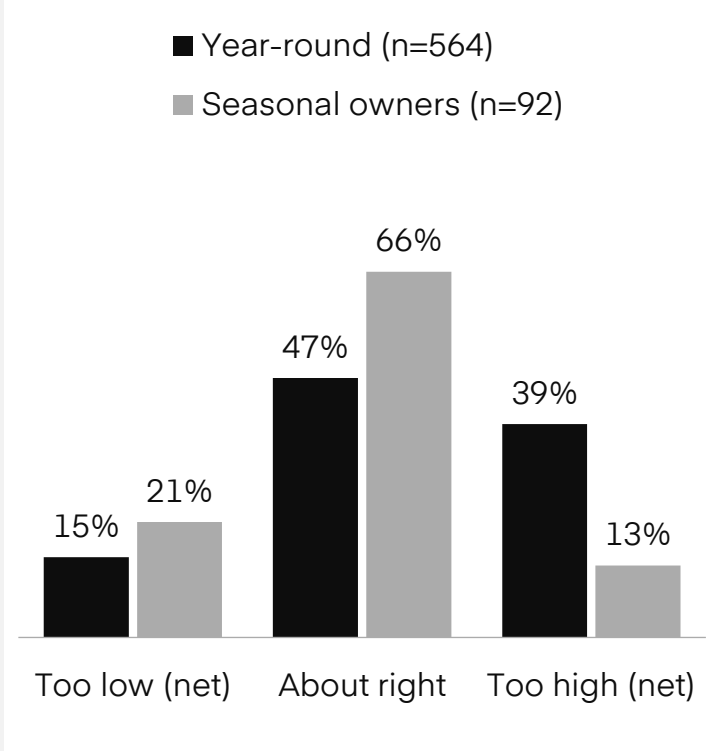
Connection to the Municipality, share of residents, 2026 (n=713).

Seasonal owners are far more positive about tourism



Overall feeling about tourism in the Municipality, 2026 (n=707).

Year-round residents are three times as likely to say it is too much



"Is the current level of tourism…", 2026 (n=671).

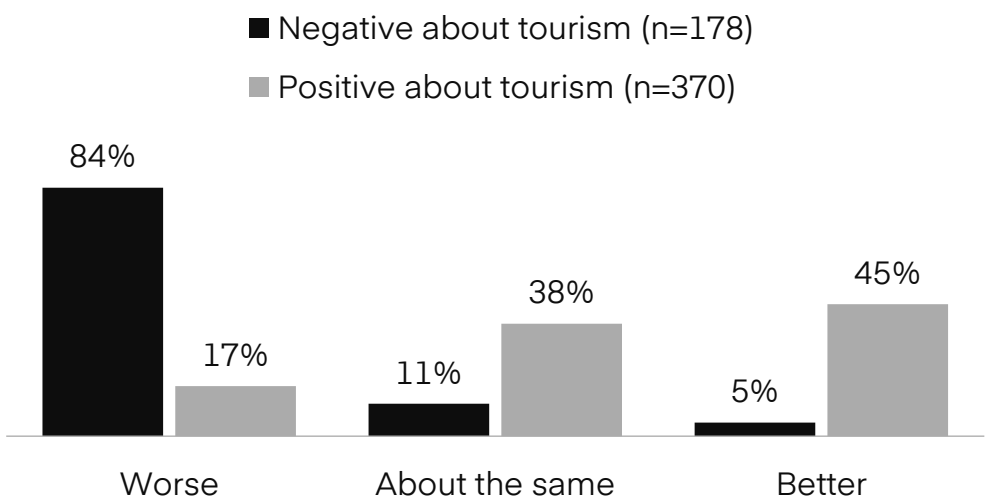
Figures are weighted. Net negative is somewhat or very negative; net positive is somewhat or very positive. Temporary workers (3%) are too few to show by group.
Source · 2026 Resident Survey (CRG), weighted, 713 respondents · Q1, Q12, Q19.

WHAT DIVIDES RESIDENTS ON TOURISM

84% vs 17%

Say life is worse in July and August, negative vs positive residents

Negative residents feel the peak season: 84% say July and August are worse

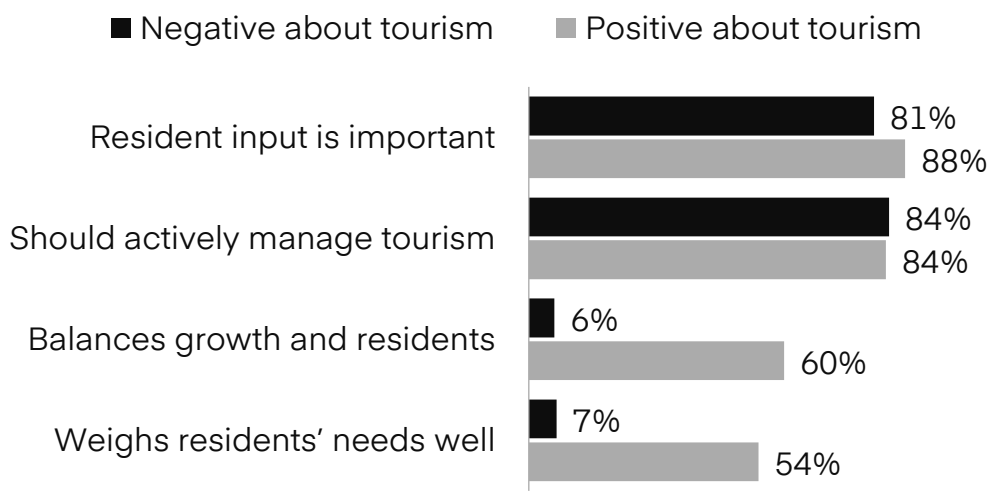


Living here in July and August compared with the rest of the year, by overall feeling about tourism, 2026.

6% vs 54%

Say the Municipality weighs residents' needs well

Both groups want a say; only positive residents think the Municipality listens



Agree or rate well (top 2 of 5), by overall feeling about tourism, 2026 (bases vary by statement: negative 177–178, positive 317–370).

Negative: somewhat or very negative about tourism (25%). Positive: somewhat or very positive (52%). Neutral residents (22%) fall between the two and are not shown.
Source · 2026 Resident Survey (CRG), weighted · Q11, Q12, Q30, Q31, Q32.

RESIDENT SENTIMENT

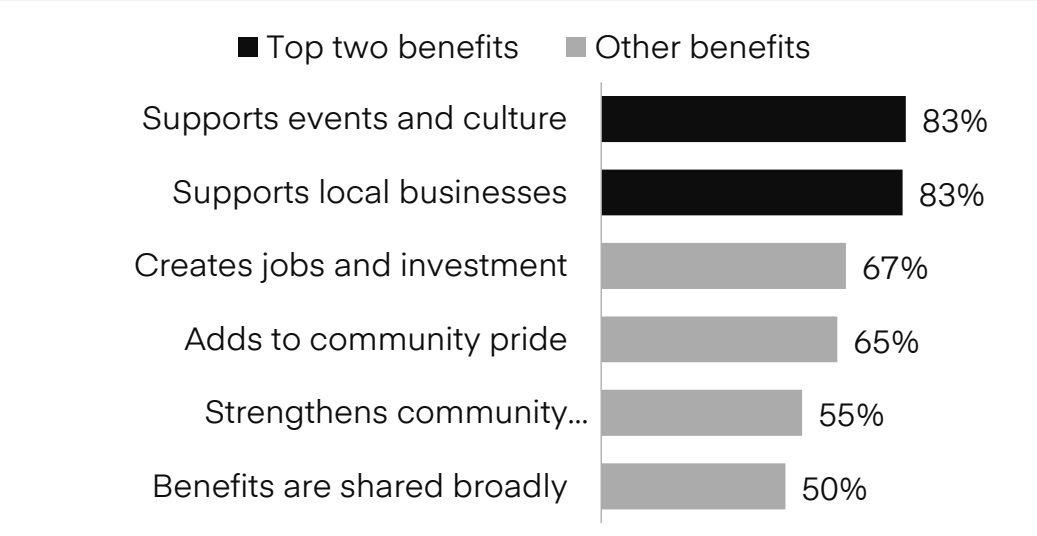
BENEFITS & GROWTH

67%
Average agreement with six benefits[1]

44%
Support growing tourism in July and August

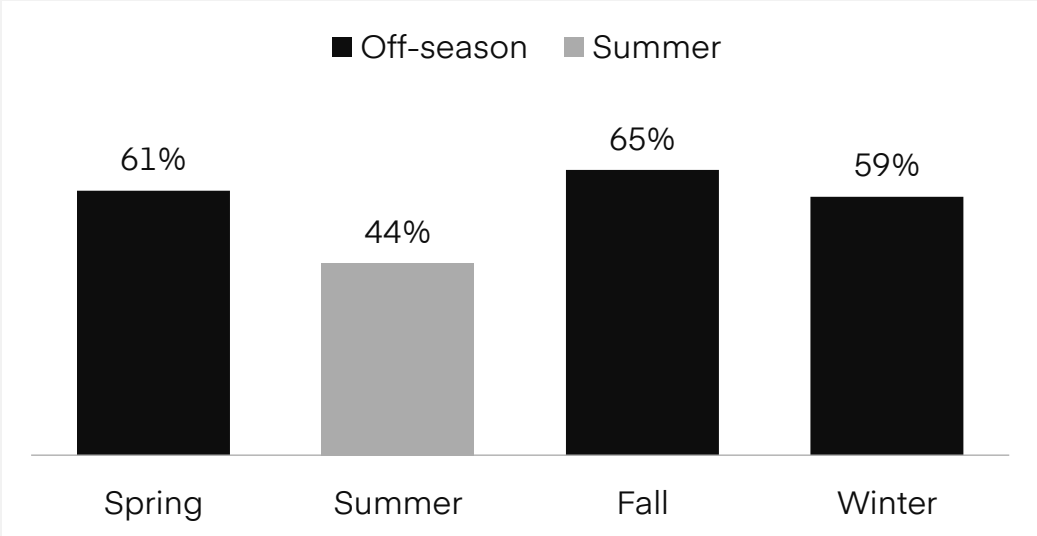
65%
Say tourism adds to community pride

Residents credit tourism most for events and local business; half say the benefits are shared broadly



Agree with each benefit (top 2 of 5), all residents, 2026 (n≈650).

Residents back off-season growth; support for more summer tourism drops to 44%



Supportive of growing tourism in each season, 2026 (top 2 of 5; n=699).

1. CRG-derived: simple average of the top-2 share across the six benefit items. Support for summer growth splits by feeling about tourism: 9% of negative residents against 64% of positive residents.
Source · 2026 Resident Survey (CRG), weighted, 713 respondents · Q14, Q20.

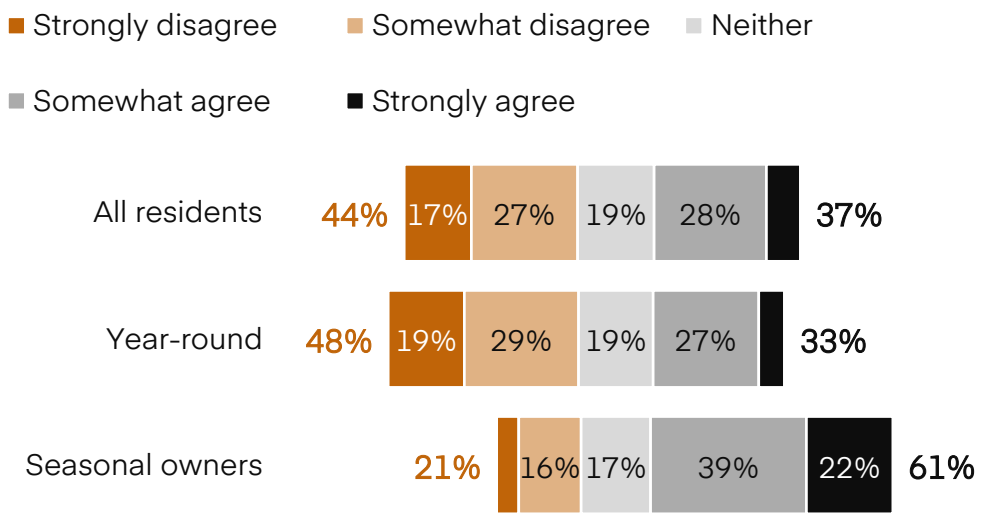
PERCEIVED CAPACITY: RESIDENT VIEW

37%
Say infrastructure keeps pace in peak season

41%
Say life is worse in July and August

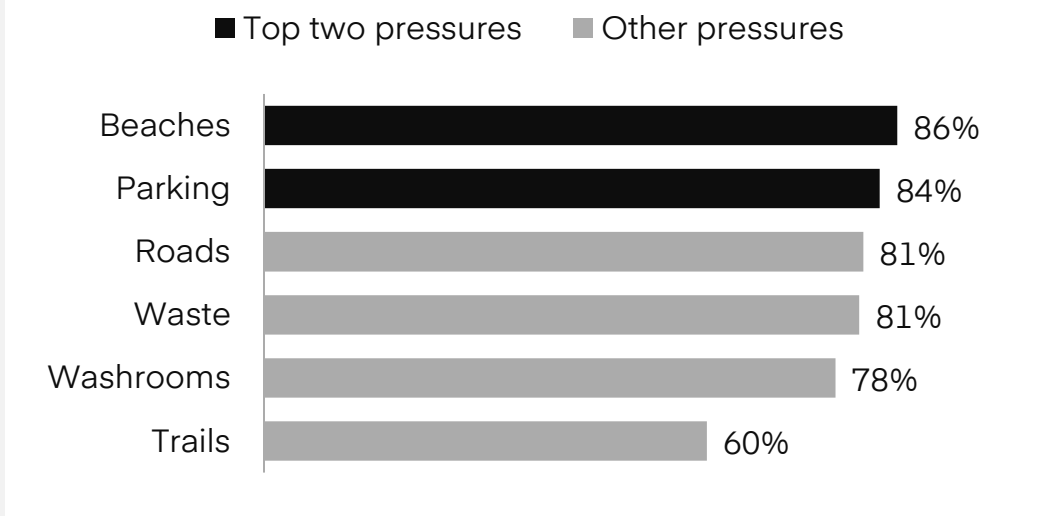
73%
Want investment in infrastructure for responsible growth

Only a third of year-round residents think infrastructure keeps pace in peak season



"Public infrastructure keeps pace with the demands of the peak visitor season" (n=680; year-round 569, seasonal owners 95). Narrow segments are not labelled.

Residents feel tourism pressure most on beaches, parking and roads



Agree tourism puts pressure on each, 2026 (top 2 of 5; n≈640). Businesses agree: 59% say parking affects customers' access (n=32).

Resident sample includes seasonal property owners (14%) and temporary workers (3%). Figures are weighted.
Source · 2026 Resident Survey (CRG), weighted, 713 respondents · Q11, Q16, Q17, Q32.

PILLAR 6: MARKET TRENDS, REACH & BRAND

How the Municipality of Kincardine reaches its market and how it is perceived.

PILLAR 6: MARKET TRENDS, REACH & BRAND

Subdomain	Indicator	Baseline (latest published)	Baseline source
Owned channels & campaigns	Reach of municipal channels	13% of visitors found out through the Municipality's website or social media (2026)	2026 Visitor Survey (CRG), n=420. Owned-channel analytics are not collected yet.
Brand & market position	Event and festival marketing performance	65% to 81% of Blues Festival tickets sold outside Kincardine	Lighthouse Blues Festival 2026 Economic Impact Report
	Competitor benchmarking	Bruce, Grey and Simcoe is fifth of 16 regions Ontario travellers are seriously considering, 19%	Destination Ontario, OTTM, Ontario market (Q1B, Jun to Aug 2026)
	Brand awareness in target markets	19% of Ontario travellers are seriously considering Bruce, Grey and Simcoe	Destination Ontario, OTTM (Q1B, Jun to Aug 2026). Consideration of the region, not awareness of Kincardine.
	Emerging travel trends ★	34% of Ontario travellers plan more trips in Canada this year	Destination Ontario, OTTM, Ontario market (Sep 2025 to Aug 2026)
	What draws visitors	Beaches and waterfront, 58%	2026 Visitor Survey (CRG)
	How visitors hear about Kincardine	Family or friends 47%, a previous visit 45% (2026)	2026 Visitor Survey (CRG), n=420, more than one answer
	Rating against other destinations	75% rate Kincardine above other Ontario lakefront or rural destinations	2026 Visitor Survey (CRG). Also in Pillar 4.

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

Owned-channel and campaign indicators are not collected yet; they are listed in the appendix.
Source · Lighthouse Blues Festival 2026 Economic Impact Report · 2026 Visitor Survey (CRG) · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM).

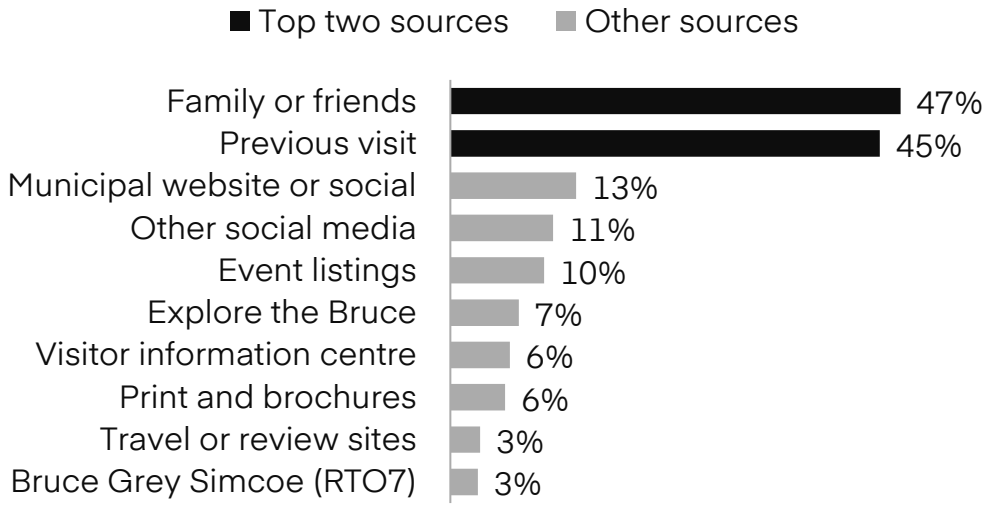
HOW VISITORS FIND KINCARDINE

75%
Rate it above other Ontario lakefront or rural destinations

30%
Considered somewhere else first

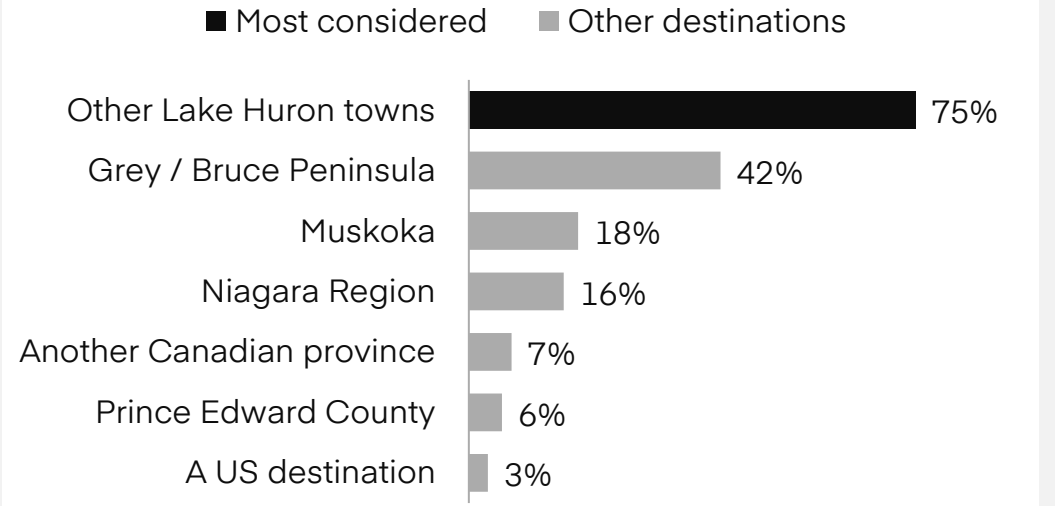
13%
Found out through municipal channels

Word of mouth and past visits bring most visitors; the Municipality's own channels reach 13%



How visitors found out about Kincardine, share of visitors, 2026 (n=420, more than one answer allowed).

Visitors who shopped around weighed other Lake Huron towns first



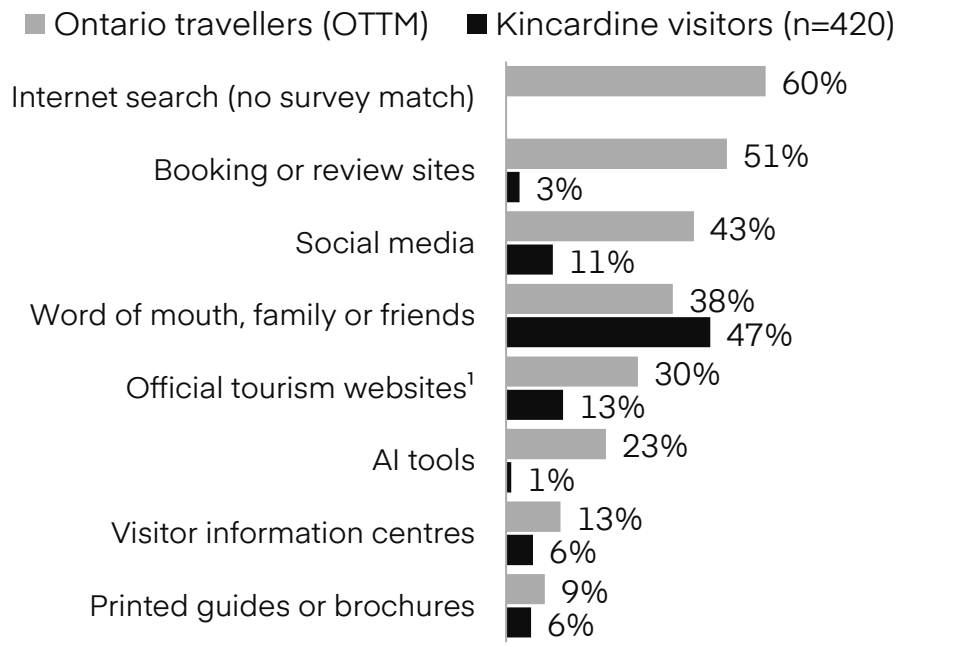
Other destinations considered, share of the 30% who considered others (n=125).

Source · 2026 Visitor Survey (CRG), unweighted · Q9, Q10, Q10A, Q21.

ONTARIO BENCHMARK: HOW TRAVELLERS PLAN

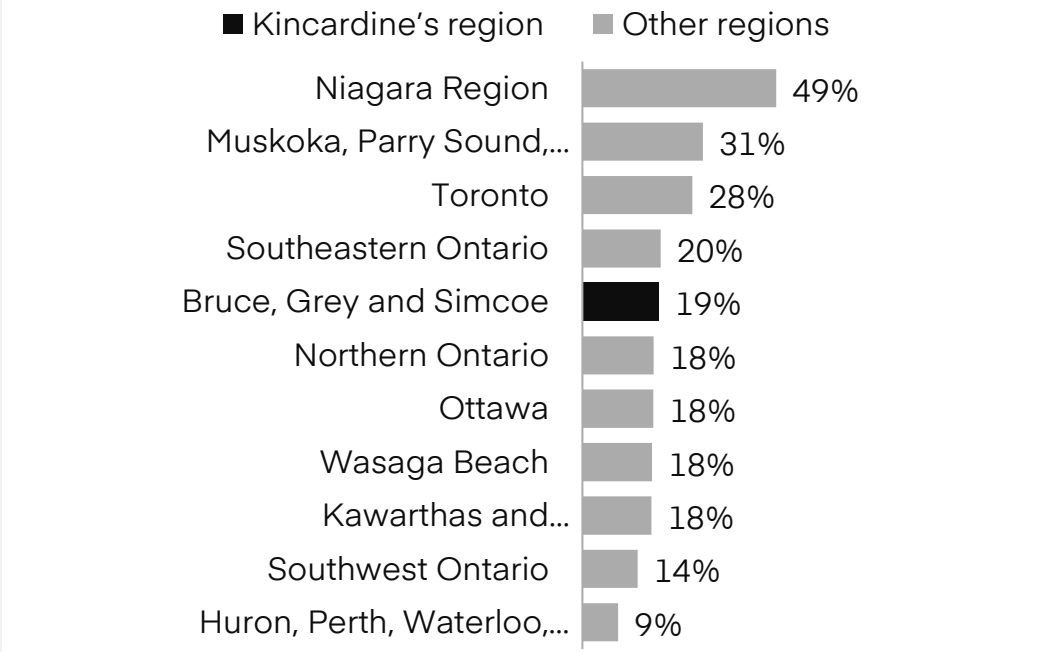
Ontario travellers research online, and one in five is considering Bruce, Grey or Simcoe; Kincardine's visitors mostly hear about it from people they know

Where Ontario travellers look, and how visitors found out



Ontario: sources used for travel information in the past month (OTTM I2, 12 months). Kincardine: how visitors found out (Q9). "Previous visit" (45%) has no Ontario match.

Ontario regions travellers are seriously considering



Share of Ontario residents aged 25–64 seriously considering each region in the next 12 months (OTTM Q1B, Jun–Aug 2026, more than one answer).

1. Kincardine: "Municipality of Kincardine website or social media". Different questions, shown side by side. Bruce, Grey and Simcoe is one OTTM region, so Kincardine can't be separated from Collingwood and Blue Mountain.
Source · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM), Ontario market · I2 (Sep 2025 to Aug 2026), Q1B (Jun–Aug 2026) · 2026 Visitor Survey (CRG), unweighted · Q9.

ONTARIO TRAVEL MARKET, 2025–26

34%
Plan more trips in Canada this year (12% plan fewer)

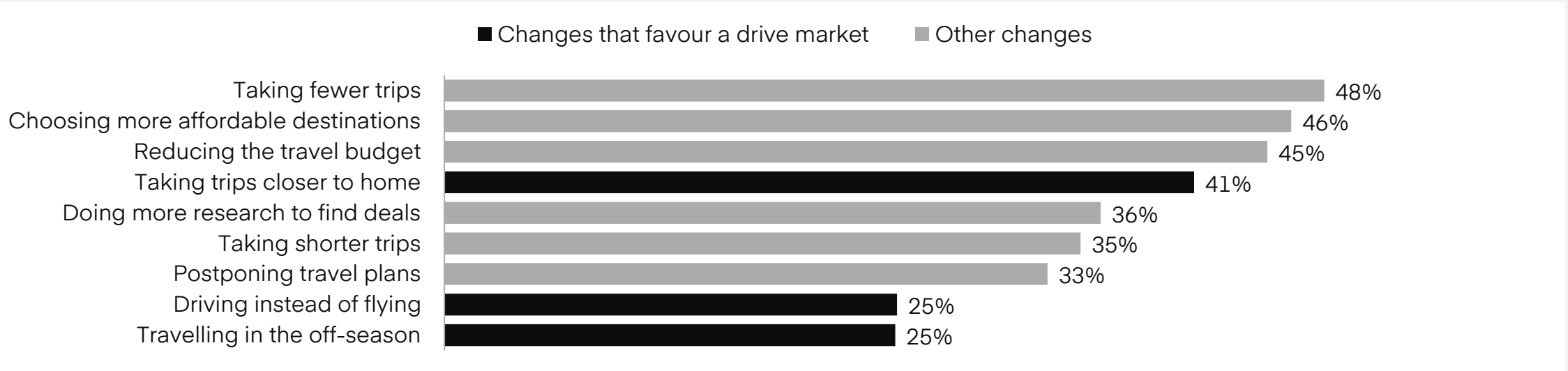
61%
Say money pressures affect their travel plans

68%
More likely to travel in Ontario because of the US political climate

32%
Have used AI tools to help plan a trip

38%
Choose destinations that put sustainable tourism first

Ontario travellers are staying closer to home and watching costs, which suits a drive-market destination like Kincardine



What money pressures change about trips, among the 61% whose plans are affected (OTTM T6, more than one answer).

Ontario residents aged 25–64, Sep 2025 to Aug 2026 (four 3-month waves averaged). Top-2 agreement for T5, P3 and ST2. Province-wide attitudes, not Kincardine data.
Source · Destination Ontario, Ontario Travel & Tourism Monthly (OTTM), Ontario market · T1, T5, T6, P3, I4, ST2.

PILLAR 7: ENVIRONMENTAL IMPACT

What tourism costs the natural environment.

PILLAR 7: ENVIRONMENTAL IMPACT

Subdomain	Indicator	Baseline (latest published)	Baseline source
Risk & perception	Resident-perceived environmental impact	60% say tourism strains trails and nature	2026 Resident Survey (CRG), weighted
	Resident satisfaction with access to parks, beaches and green space	84% satisfied (top 2 of 5)	2026 Resident Survey (CRG), weighted

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

Three environmental indicators are not collected yet, all held in municipal records; they are listed in the appendix.
Source · 2026 Resident Survey (CRG), weighted.

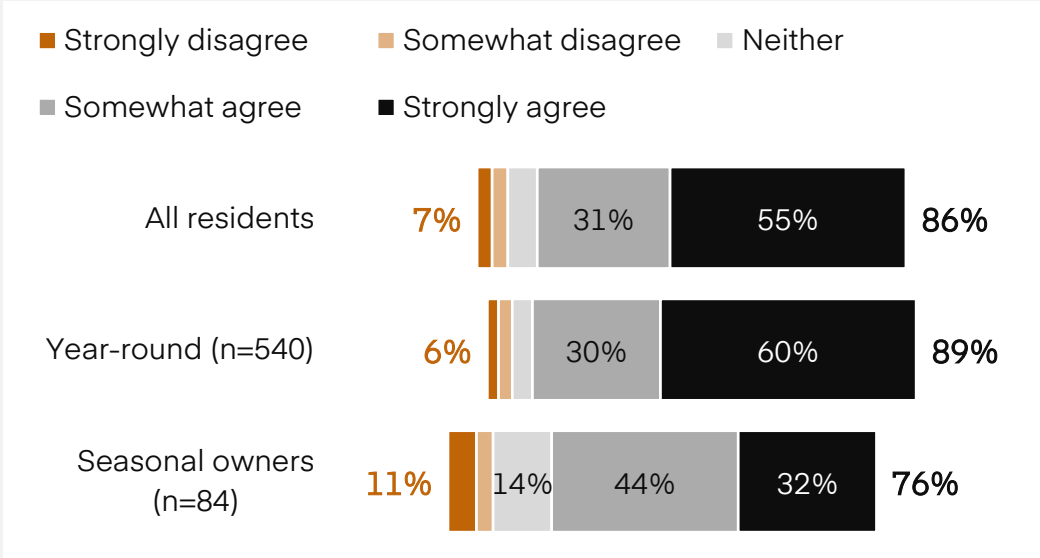
ENVIRONMENTAL PRESSURE: THE WATERFRONT

86%
Of residents say tourism puts pressure on beaches and the waterfront

84%
Of residents are satisfied with access to parks, beaches and green space

97%
Of visitors are satisfied with the beaches and waterfront

86% of residents say tourism puts pressure on the beaches, year-round residents most of all



"Tourism puts pressure on beaches and waterfront access", 2026 (n≈640). Narrow segments are not labelled.

Residents still rate their access to beaches and green space highly: 84% are satisfied

Residents satisfied (top 2 of 5)	Aspects of life in the Municipality
90% to 100%	None
80% to 89%	Access to parks, beaches and green space; sense of peace and quiet
Under 80%	Things to do (66%), local infrastructure (65%), restaurants, shops and local businesses (65%), jobs and economic opportunities (52%)

Residents' satisfaction with aspects of life in the Municipality, grouped by score, 2026 (Q9, n≈700).

No aspect of life reached 90% satisfaction among residents; visitors rate the beaches and waterfront at 97%.
Source · 2026 Resident Survey (CRG), weighted, 713 respondents · Q9, Q16 · 2026 Visitor Survey (CRG), unweighted · Q13.

PILLAR 8: INDUSTRY & WORKFORCE HEALTH

How tourism businesses are faring through the seasons, and whether they can find and keep staff.

PILLAR 8: INDUSTRY & WORKFORCE HEALTH

Subdomain	Indicator	Baseline (latest published)	Baseline source
Dependence & seasonality	Share of businesses earning 25%+ of revenue from tourism	44% earn a quarter or more of revenue from visitors (14 of 32)	2026 Business Survey (CRG), n=32, directional
	Business off-season difficulty	41% find the off-season challenging (13 of 32), including 11 of the 14 that earn 25%+ from visitors	2026 Business Survey (CRG), n=32, directional
	Seasonal revenue distribution	47% say a more even spread of visitors through the year would help them (15 of 32)	Partial: the survey did not ask revenue by season. 30 of 32 open year-round.
	Bruce Power / transient worker share of business revenue	22% say contractors are a significant share of revenue (7 of 32); 63% serve them	Self-reported band, not a percentage of revenue. 2026 Business Survey (CRG), directional.
Workforce	Tourism job vacancies ★	About 25 active tourism postings a month (12-month average to Aug 2026)	connect2JOBS via Four County Labour Market Planning Board. Postings, not vacancies.
	Workforce recruitment and retention difficulty	53% of businesses with seasonal staff find recruiting and keeping them challenging (9 of 17)	2026 Business Survey (CRG), n=17 with seasonal staff, directional
	Staff housing as a barrier to recruitment	69% say affordable staff housing is a barrier (22 of 32)	2026 Business Survey (CRG), n=32, directional
Municipal support	Business views on municipal support and priorities	66% say the Municipality supports tourism businesses well (21 of 32); 85% want more off-season programming (22 of 26)	2026 Business Survey (CRG), directional
	Business awareness of tourism supports	56% are aware of the tourism support and programs available (18 of 32)	2026 Business Survey (CRG), directional

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

Business Survey results are directional: 32 businesses, open link, unweighted. One indicator is not collected yet and is listed in the appendix.
Source · 2026 Business Survey (CRG) · connect2JOBS via Four County Labour Market Planning Board, August 2026.

BUSINESS SURVEY: WHO ANSWERED

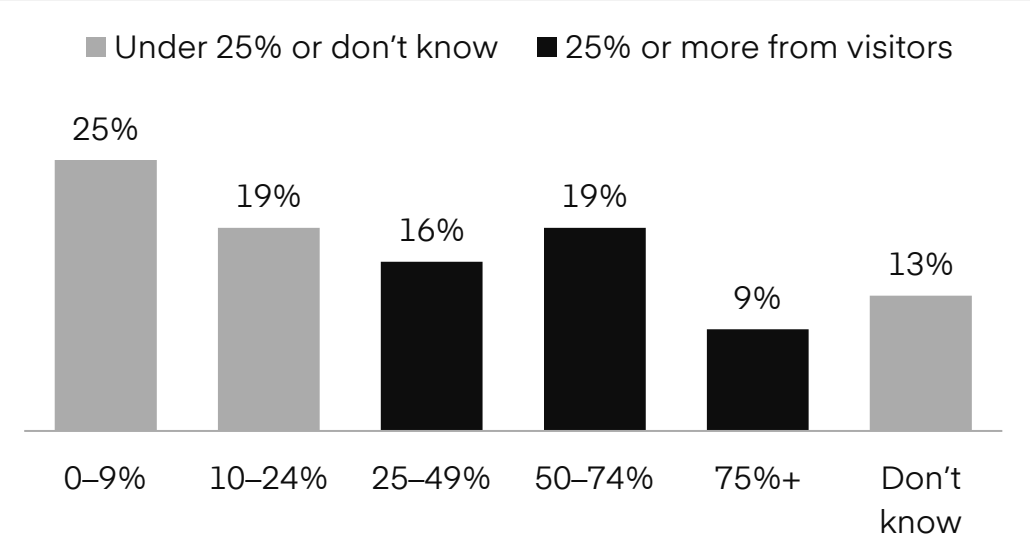
32
Businesses and organizations answered

44%
Earn 25% or more of revenue from visitors (14 of 32)

94%
Operate year-round (30 of 32)

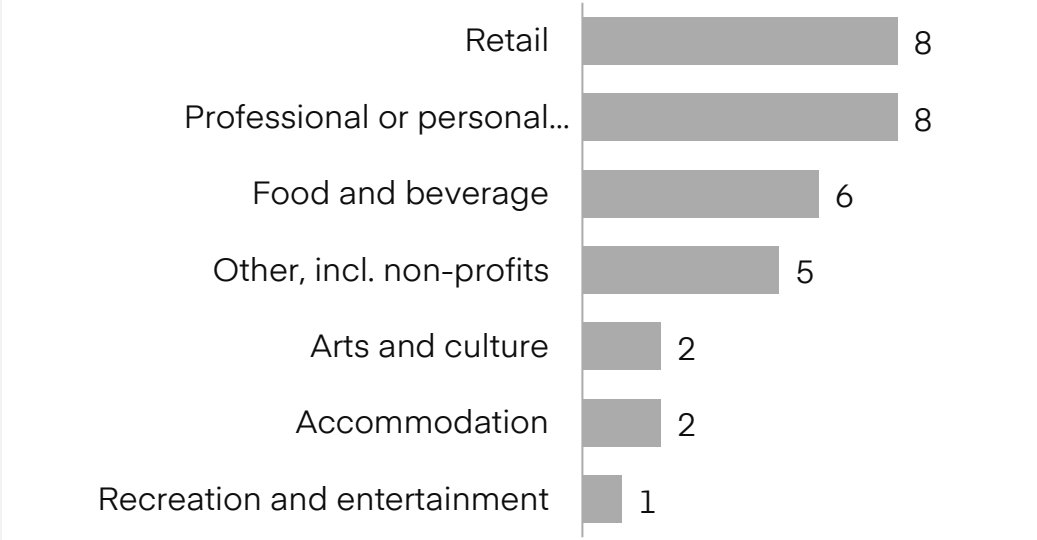
34%
Have operated here more than 20 years (11 of 32)

Four in ten businesses that answered earn a quarter or more of their revenue from visitors



Share of businesses by the share of their annual revenue that comes from visitors (n=32).

Retail and professional services make up half of the businesses that answered



Number of businesses and organizations by type (n=32).

Open-link survey of 32 businesses and organizations in the Municipality, 3 July to 8 September 2026, unweighted. All results are directional (under 50 respondents).
Source · 2026 Business Survey (CRG) · SC2, Q1, Q2, Q3.

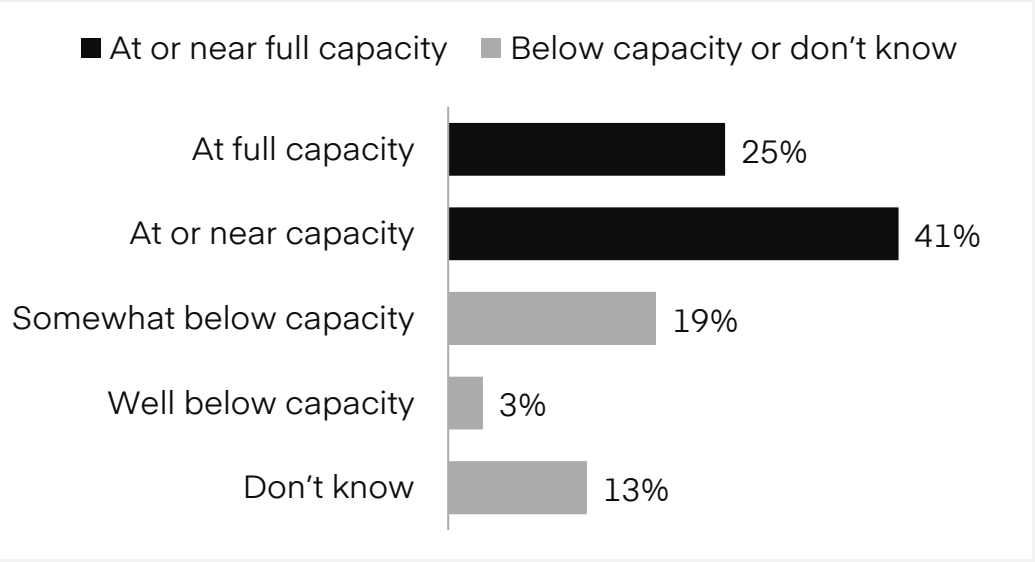
PEAK SEASON & THE OFF-SEASON

66%
At or near full capacity in peak visitor season (21 of 32)

41%
Find the off-season challenging (13 of 32)

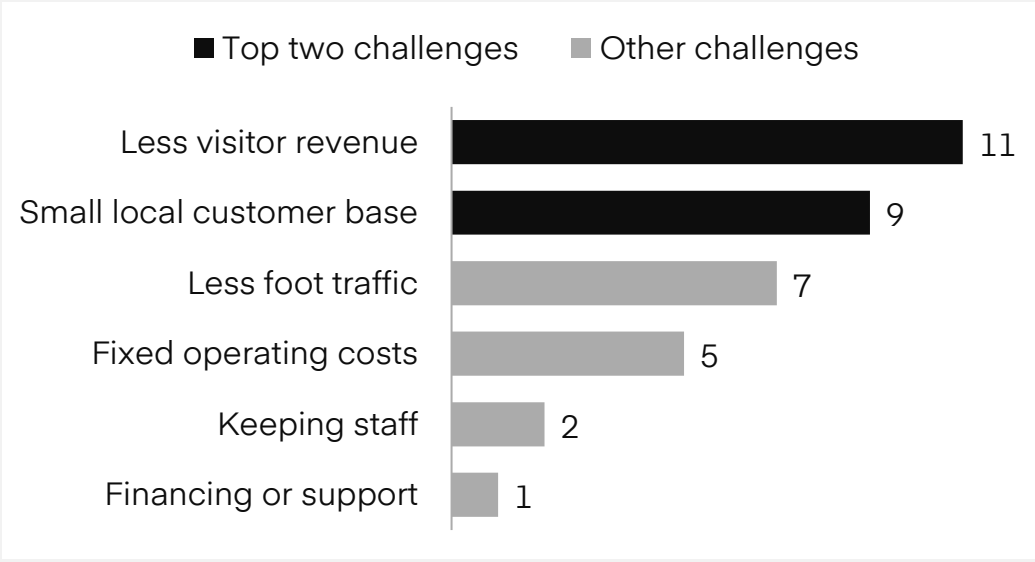
11 of 14
Businesses earning 25%+ from visitors find the off-season challenging; none of the 14 earning less do

Two thirds of businesses run at or near full capacity in peak season



How close to full capacity businesses operate in peak visitor season, share of businesses (n=32).

Lost visitor revenue and a small local customer base are the main off-season problems



Main off-season challenges, number of businesses that find the off-season challenging (n=12), more than one answer.

Open-link survey of 32 businesses and organizations in the Municipality, 3 July to 8 September 2026, unweighted. All results are directional (under 50 respondents).
Source · 2026 Business Survey (CRG) · Q3, Q5, Q6, Q6A.

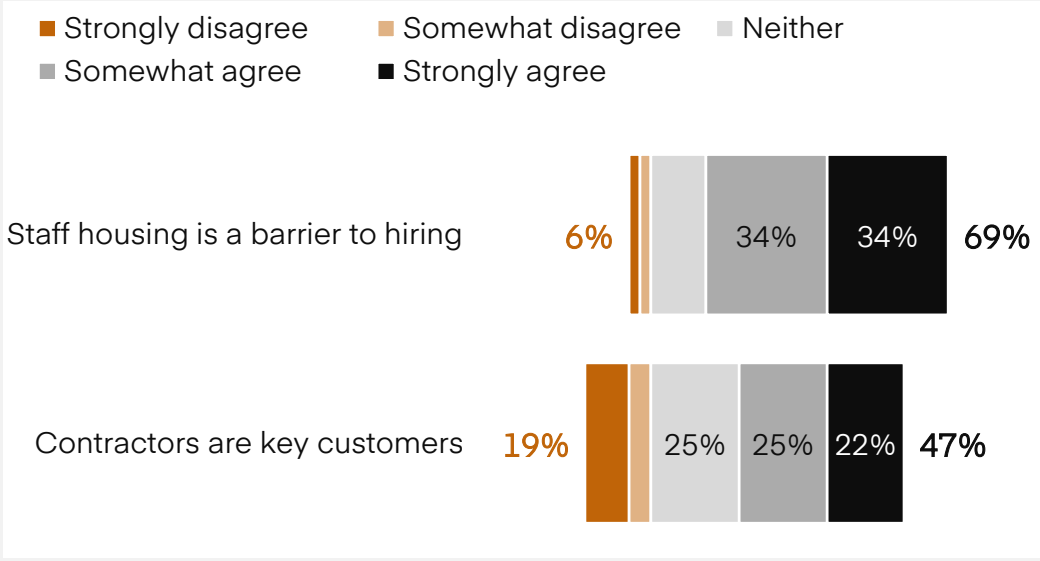
WORKFORCE & STAFF HOUSING

69%
Agree affordable staff housing is a barrier to hiring and keeping staff (22 of 32)

53%
Of businesses with seasonal staff find recruiting and keeping them challenging (9 of 17)

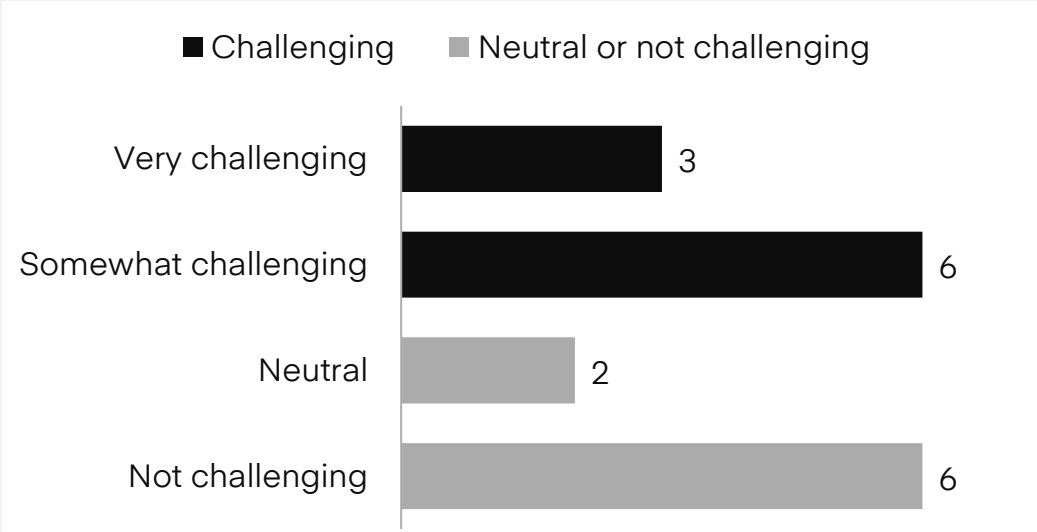
22%
Say contractors and transient workers are a significant share of revenue (7 of 32)

Seven in ten businesses say staff housing is a barrier to hiring



Agreement with each statement, share of all 32 businesses; "don't know" not shown. Narrow segments are not labelled.

Just over half of businesses with seasonal staff find them hard to recruit and keep



Recruiting and keeping seasonal staff, number of businesses with seasonal staff (n=17); 15 have none.

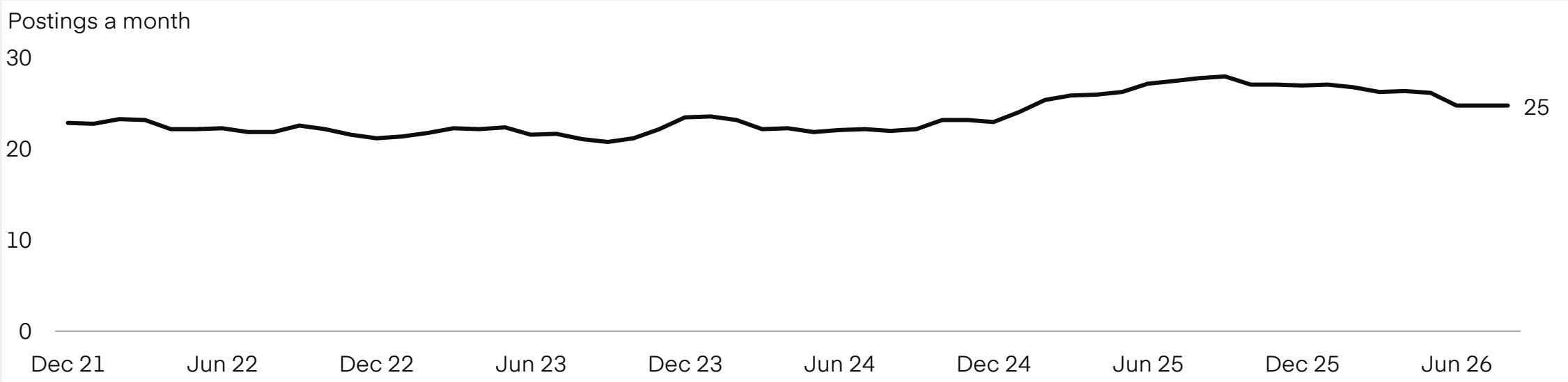
Open-link survey of 32 businesses and organizations in the Municipality, 3 July to 8 September 2026, unweighted. All results are directional (under 50 respondents).
Source · 2026 Business Survey (CRG) · Q4, Q8, Q9.

WORKFORCE

TOURISM JOB POSTINGS

25	12	9%	25%
Active tourism postings a month, 12-month average	Employers posting a month	Of all Kincardine job postings	Of Bruce County's tourism postings

Tourism job postings have stayed between 21 and 28 a month since 2021, with no sign of a spike



Active tourism job postings a month, 12-month rolling average, Kincardine CSD, December 2021 to August 2026.

Online job ads (active = live at any point in the month), not employer-reported vacancies, so no vacancy rate can be calculated. CRG's 25-code tourism definition. The tool places some postings in Kincardine in error: in August 2026, 5 of 26 were from employers elsewhere.
Source · connect2JOBS Labour Market Insights Report, Four County Labour Market Planning Board, extracted 28 August 2026.

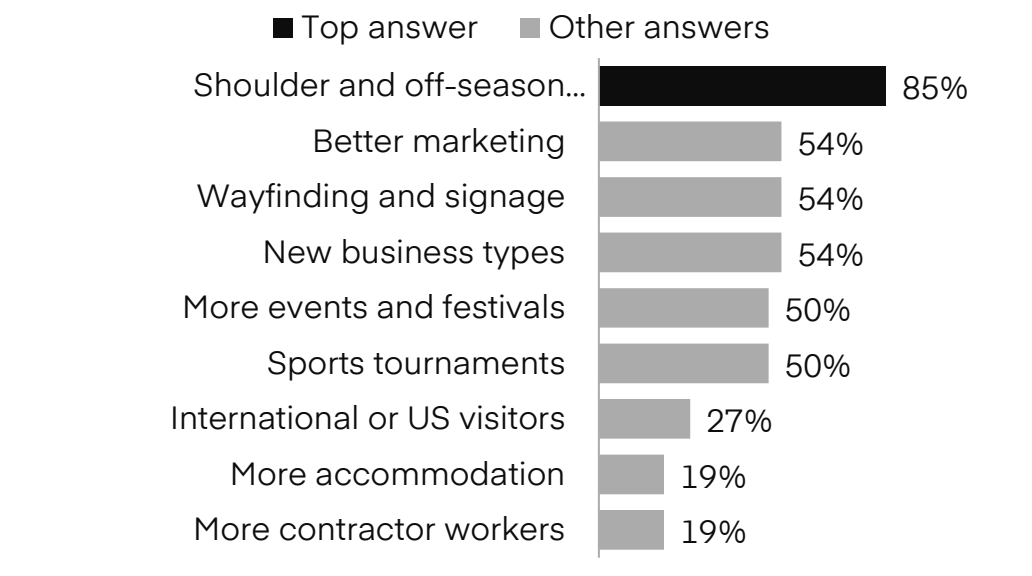
MUNICIPAL SUPPORT & BUSINESS PRIORITIES

66%
Say the Municipality does a good job of supporting tourism businesses (21 of 32)

85%
Want more shoulder and off-season programming (22 of 26)

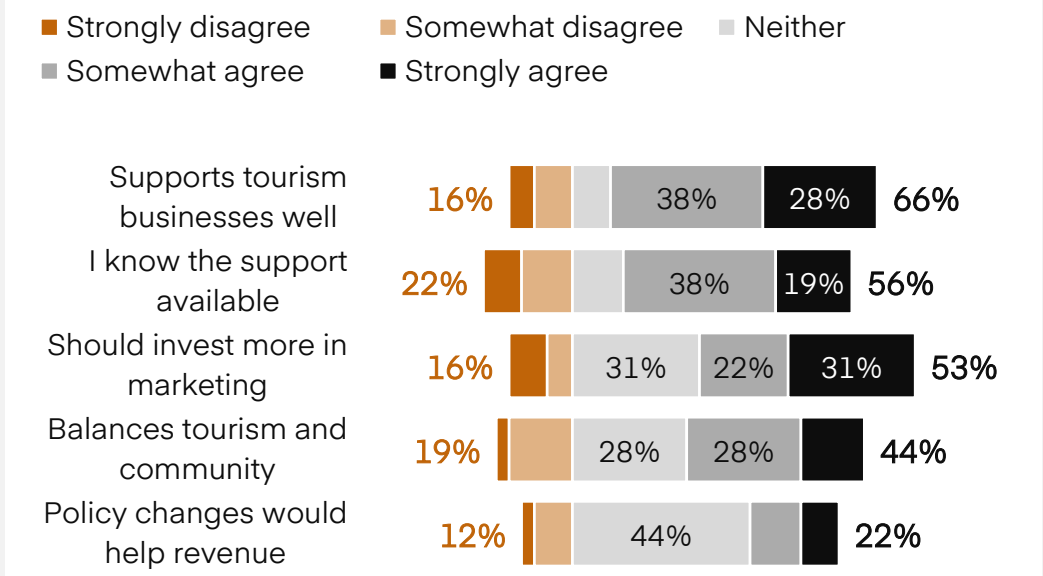
56%
Are aware of the tourism support and programs available (18 of 32)

Off-season programming is the growth most businesses say would help them



Tourism growth that would most help the business, share of businesses answering (n=26), more than one answer.

Businesses agree most strongly that the Municipality should invest more in marketing



Agreement with each statement, share of all 32 businesses; "don't know" not shown. "Invest more in marketing" has the most "strongly agree" answers (10). Narrow segments are not labelled.

Open-link survey of 32 businesses and organizations in the Municipality, 3 July to 8 September 2026, unweighted. All results are directional (under 50 respondents).
Source · 2026 Business Survey (CRG) · Q13, Q14.

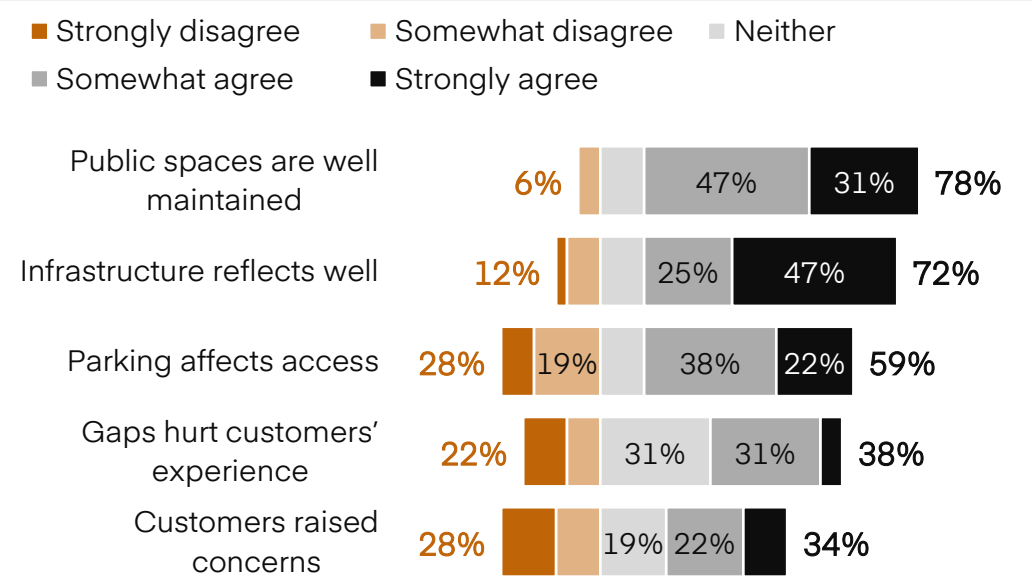
INFRASTRUCTURE: THE BUSINESS VIEW

78%
Say public spaces are kept to a standard that supports visitors (25 of 32)

72%
Say public infrastructure reflects well on Kincardine (23 of 32)

59%
Say parking availability affects their customers' access (19 of 32)

Overall, business owners are satisfied with public infrastructure



Agreement with each statement, share of all 32 businesses; "don't know" not shown. Narrow segments are not labelled.

When asked what to improve, most named parking



Improvements named in the 23 written answers, number; coded into themes by CRG, and an answer can count in more than one.

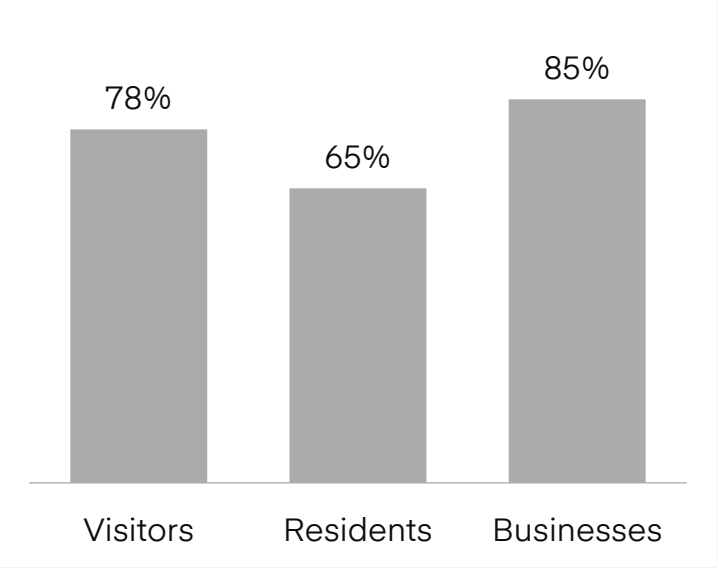
Open-link survey of 32 businesses and organizations in the Municipality, 3 July to 8 September 2026, unweighted. All results are directional (under 50 respondents). No written answers are quoted, so no business can be identified.
Source · 2026 Business Survey (CRG) · Q10, Q11, Q12.

ALL THREE SURVEYS

THREE SURVEYS, ONE DIRECTION

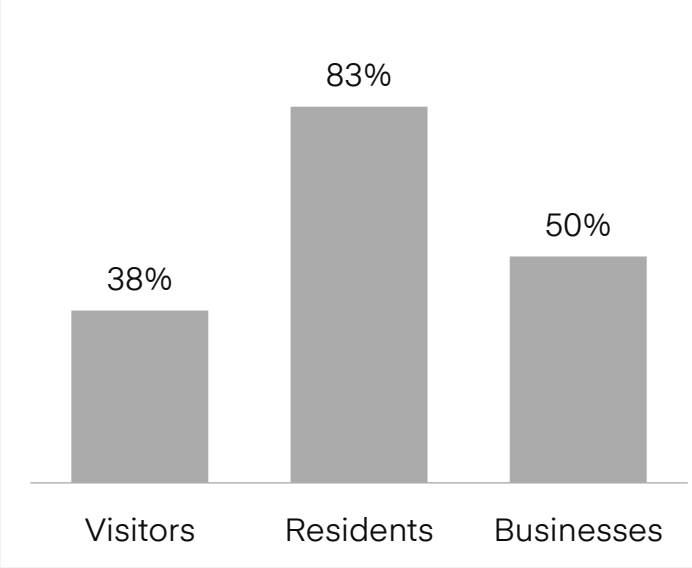
Visitors, residents and businesses all point to the shoulder season and to events; parking looks different from each side

Shoulder season



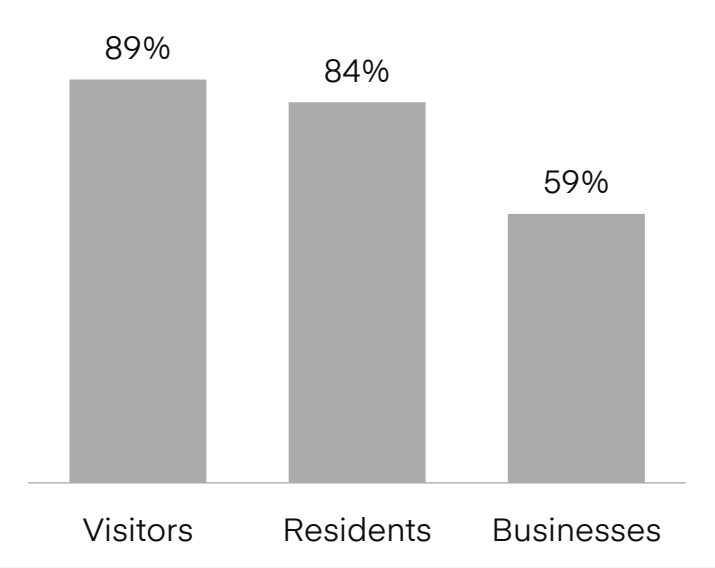
Visitors: likely to return in fall. Residents: support fall growth. Businesses: want off-season programming (n=26).

Events



Visitors: more events would draw them off-season. Residents: tourism supports events. Businesses: want more events (n=26).

Parking



Visitors: satisfied with parking. Residents: tourism strains parking. Businesses: it affects customer access (n=32).

Different questions to different groups: each chart shows the same theme, not one comparable measure. Business results are directional.
Source · 2026 Visitor Survey (CRG), unweighted, n=426 · 2026 Resident Survey (CRG), weighted, n=713 · 2026 Business Survey (CRG), unweighted, n=32.

APPENDIX: INDICATOR STATUS TABLES

Indicators in the framework with no baseline yet.

APPENDIX

NOT YET COLLECTED: PILLARS 1 TO 3

Status	Indicator	What it would take
PILLAR 1: VISITOR PROFILE, VOLUME & BEHAVIOUR		
Not collected	Event cost-to-revenue ratio	No cost data is collected for any event; needs the Municipality's cost per event.
PILLAR 2: ECONOMIC IMPACT		
Not collected	Municipal and tourism budget ★	Municipality Finance: confirm the 2026 Tourism budget line, and whether event costs held under Community Services count toward it.
PILLAR 3: ACCOMMODATION CAPACITY & DEMAND		
Not collected	Parking utilization at peak periods ★	Paid-parking transactions for the beach lots, by date and lot. Operations.
Not collected	Parking tickets ★	By-law enforcement keeps them, dated and located. Same Operations request.
Not collected	Resident complaints (e.g. garbage at beach) ★	Municipal service-request system, extracted by category and date.
Not collected	Special event bookings ★	Facility bookings (Recreation) and special event permits (Clerk); both are dated records.
Not collected	Investment in tourism-related infrastructure ★	Building, special event and tent permits, plus trails and tourism budget lines.
Not collected	Marina, campground and trail counts ★	Facility and counter records, where they exist.
Needs decision	Municipal service cost attribution	Needs municipal spend on tourism to calculate community and organization-level ROI.

★ = a priority indicator flagged by the Municipality during the August 2026 framework review.

APPENDIX

NOT YET COLLECTED: PILLARS 4 AND 6

Status	Indicator	What it would take
PILLAR 4: VISITOR EXPERIENCE & SATISFACTION		
Not collected	Online review ratings and volume (Google, TripAdvisor) ★	Free, and the only measure of experience between survey waves.
PILLAR 6: MARKET TRENDS, REACH & BRAND		
Not collected	Website traffic and engagement ★	Google Analytics is already running; needs a quarterly export.
Not collected	Social media reach and engagement ★	Native platform analytics are free.
Not collected	Campaign performance (CTR, conversions) ★	Depends on whether paid campaigns run; needs the 2025 and 2026 campaign list, with dates and costs, from Tourism and Communications.

APPENDIX

NOT YET COLLECTED: PILLARS 7 AND 8

Status	Indicator	What it would take
PILLAR 7: ENVIRONMENTAL IMPACT		
Not collected	Trail and beach condition reports ★	No source identified yet.
Not collected	Environmental incidents or degradation ★	No source identified yet.
Not collected	Road closures ★	Operations and by-law records; covers all closures, not only weather.
PILLAR 8: INDUSTRY & WORKFORCE HEALTH		
Not collected	Participation in tourism training programs ★	No source identified yet.

APPENDIX: UNDERSTANDING ROI

Tourism’s return and where the tax on visitor spending goes.

APPENDIX

TOURISM ROI: WHERE THE TAX ON VISITOR SPENDING GOES

Of the $277 in tax from a travel party's trip, $24 is local, and TREIM can't say how much of that reaches Kincardine

$1,020 → **$672** → **$277**

spent by one travel party on a trip to Kincardine

GDP it generates in Bruce County

in tax to all levels of government

WHERE THE $277 GOES



$125 · 45%
Federal: income tax, GST/HST, gas and excise taxes

$127 · 46%
Provincial: income tax, HST, gas and liquor taxes

$24 · 9%
"Municipal" in TREIM

WHAT THE $24 IS MADE OF

Municipality of Kincardine
The only part the Municipality keeps.

Bruce County
The upper tier, for county services.

Education
Ontario sets the rate. The Municipality collects it and passes it to school boards.

And it is added up across every municipality in Bruce County, not just Kincardine. TREIM doesn't split it by pot or by municipality, so Kincardine's share is unknown. It is also an estimate of tourism's share of property taxes already collected, not new money each visitor pays.

WHAT THE MUNICIPALITY GETS BACK

MUNICIPAL REVENUE FROM TOURISM +

- Kincardine's share of property tax on tourism properties: accommodation, restaurants, attractions
- User fees, permits, facility rentals and event fees linked to visitors
- Grants that tourism activity brings in

No accommodation tax: Council decided against one.

COST OF SERVING VISITORS −

- Beaches, washrooms and waste in peak season
- Bylaw enforcement
- Roads and parking

Net return to the Municipality = ?

INPUT NEEDED
Both lists come from the Municipality's Finance and Operations groups.

Source · Ontario TREIM, Bruce County, 2026 · 2026 Visitor Survey (CRG), unweighted · Q17.