

insights

Report on Research to Support Bruce Brand Project

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1 BACKGROUND, OBJECTIVES AND METHODOLOGY



NEW BRUCE BRAND

The County of Bruce has engaged Tenzing to assist in development of a new Bruce brand. In turn, Insights is providing the research component of the branding project.

THE BRANDING PROJECT

The County is seeking ...
a new Bruce brand that best defines and communicates its unique positioning to its target audiences.
These audiences include existing and future residents, visitors, existing and new business owners, and the Corporation itself.

APPLICATION OF THE NEW BRAND

The County intends that ...
the new Bruce brand will form the basis for a unified voice across all Corporate functions in addition to raising the County's profile as a viable place to live, visit and to build a business.

ROLE OF RESEARCH

The goal of the research was to determine how Bruce County is currently known, and to identify strengths and attributes that can be leveraged when developing the new brand, to ensure that it is credible and motivational.

A THREE PART RESEARCH PROCESS

PART 1 REVIEWING EXISTING REPORTS AND STUDIES

OBJECTIVES FOR PART 1

- To leverage existing learning and avoid duplication of effort, particularly in addressing tourism (as this was the focus of most of the resources); see Appendix for list of reports and studies that were reviewed
- Note that Part 1 was primarily used to inform questionnaire design for Part 2; no specific deliverables but some limited references in this report as relevant

PART 2 QUANTITATIVE SURVEY OF ONTARIO RESIDENTS

OBJECTIVES FOR PART 2

- To learn, from the key target audience of Ontario residents:
 - awareness, familiarity (including incidence of first hand experience through visiting) and impressions of Bruce County
 - evaluation of Bruce County on a variety of dimensions, including perceived suitability as a place to live and work
 - unaided perceptions of strengths and concerns for Bruce County
 - reaction to preliminary concept statements describing the County

PART 3 QUALITATIVE RESEARCH WITH STAKEHOLDERS & RESIDENTS

OBJECTIVES FOR PART 3

- To involve the community in the branding project by sharing objectives and process, clarifying expectations and seeking input regarding:
 - the personality of Bruce County, including strengths, shortcomings, and areas of uniqueness
 - perceptions of what makes the County attractive for residents, businesses and visitors

PART 2: QUANTITATIVE SURVEY OF ONTARIO RESIDENTS

- telephone survey of 505 adults 25-65 living in all parts of Ontario excepting the far north (see Appendix for profile of respondents)
- quotas by region, age and gender; data weighted by these variables to ensure accurate reflection of the population (see Appendix for full details) ... and results can be extrapolated within a range of + or – 3.7% at worst, with a 95% level of confidence
- questionnaire included as an Appendix; incidence of 52% and average length of 16.2 minutes
- survey in field November 23 to December 6, 2015
- full tabulation of results with crosstabs provided separately, verbatim responses to open ended questions appended

PART 3: QUALITATIVE RESEARCH WITH STAKEHOLDERS AND RESIDENTS

- meetings facilitated by Terry Green of Insights, with participation of Gary Lintern of Tenzing, as follows.

Timing	Group	# participating
November 30, 2015		
(Museum: Southampton)		
2 – 4:30 pm	Civic leaders	12
7 – 9:30 pm	Citizens	12
December 1, 2015		
(Walkerton Administration Bldg)		
9:30 – noon	Council	8
1 – 3:30 pm	Directors & staff	10

- all recruiting done by County staff, and two staff attended as notetakers
- meeting consisted of a brief presentation outlining the branding process, group discussion, and idea generation by small teams with the group

2 SUMMARY



WORKING FROM A POSITION OF STRENGTH

- The new Bruce brand is being created from a position of strength. Today, Bruce County is well known and positively regarded by Ontario residents; 85% had heard of the area, and 81% of these people had a positive impression while the balance were simply neutral. Moreover, those who had visited were typically positive about their experiences and expressed high likelihood of returning.
- However, only 15% of the total sample felt that they had high familiarity with Bruce County, and 65% indicated that they were aware of the County and had at least some familiarity (scores of >1 where 1=low) ... reinforcing the need for communications.

WHAT BRUCE COUNTY IS KNOWN FOR TODAY

- The identity of Bruce County, and its most unique strength, revolved around the spectacular natural landscape: its scenic beauty and myriad of easily accessible outdoor recreational opportunities were almost iconic. This was seen by community members as a key driver for all who come to the County.
- The County was also seen as a traditional, friendly rural area with strong community and family values: a place where life was less hectic and stressful.
- When it came to fulfilling the needs that they considered most important when choosing a place to live, however, there was a bit of a disconnect; ~40% of those with at least some familiarity were not convinced that the Bruce would deliver on health care, affordability, easy accessibility, and work:life balance. To some extent, this reflects the low to moderate familiarity and is a communication challenge.

PERCEIVED SUITABILITY FOR LIVING, WORKING AND VISITING

- Through the survey of Ontarians, Bruce County was endorsed most strongly as a vacation destination, secondly as a place to live, and relatively least enthusiastically as a place to work or have a business – an assessment that was reinforced through the community meetings.
 - Tourism was clearly a success story. The majority of those in the survey who were aware of the County had visited in the past five years, and their satisfaction and high likelihood of returning were consistent with past visitor research.
 - Beyond Bruce Power, which was a significant employer, and seasonal employment, availability of jobs and favourable opportunities for establishing businesses were seen as limited ... a barrier to attracting new permanent residents.
 - As a place to live, the County was perceived as most suitable for those raising a family, and for empty nesters ... and was challenged in appealing to young adults. Looking ahead, however, the community prioritized attracting younger residents to ensure sustainability of the area; those who had grown up in The Bruce or another rural area, and who have started their families, were seen as the most likely targets, as they know and appreciate the benefits of living outside the city.

IMPLICATIONS FOR THE NEW BRUCE BRAND

- Residents pointed out that there were distinct differences across the County – not only geographically, but in terms of the range of possible experiences, groups of residents, and economic health. While this variety translates into a unique strength, particularly for tourism and secondarily for those living in the area, it adds a layer of difficulty to creating a brand identity.
- When developing the new Bruce brand, there is logic in leveraging the positive awareness of the natural environment and active outdoor lifestyle for which Bruce is already recognized. The brand concepts that were tested, and most of the ideas that the community brainstormed, were built on this foundation. Other elements that defined the Bruce personality, and which could contribute to the brand with credibility, included community, simplicity, rural / agriculture, environmentally friendly, and water.
- Among the brand concepts that were tested, the one that directly focused on living close to nature (*living in an active outdoor oriented community with easy access to a unique and appealing blend of ...*) had very high credibility but was strongly appealing to only ~40%. When parlayed into a statement that highlighted simplifying life, nearly 60% found this concept appealing ... but credibility was slightly lower.
- The proposed brand concept that presented rural, local living resonated less strongly than the notion of simplifying life, but had similar credibility.
- The community brainstorming resulted in ideas that related to the natural environment and lifestyle, with one notable exception. This idea linked nature, energy and agriculture to present Bruce County as environmentally forward: a leader in climate change.

3 DETAILED RESULTS OF QUANTITATIVE SURVEY

Awareness, Familiarity and Overall Impressions of Bruce County
Visitation to Bruce County by Those Who Had Familiarity
Evaluation of Bruce County
Perceived Suitability of Bruce County as a Place to Live and Work
Perceived Strengths and Concerns
Reaction to Concept Statements Describing Bruce County

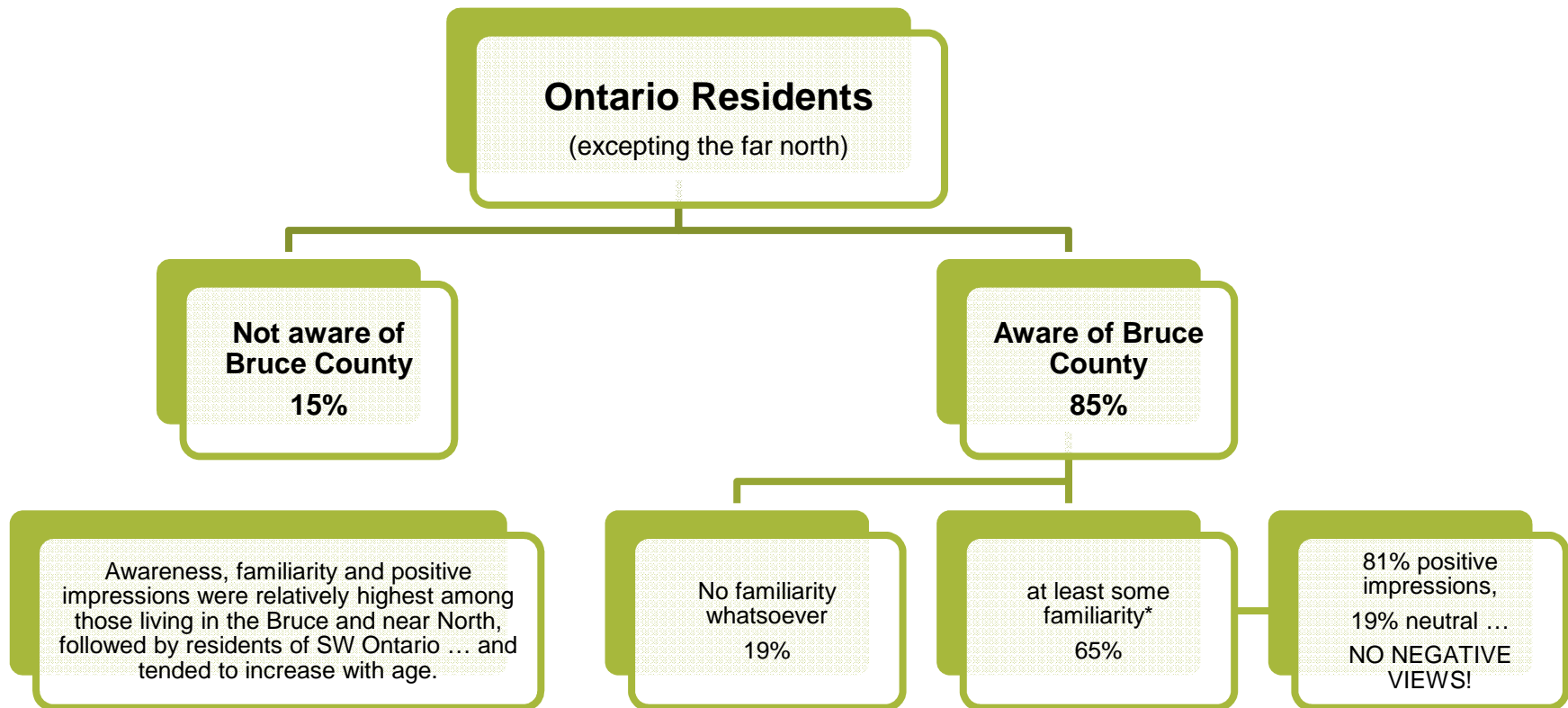
Awareness, Familiarity and Overall Impressions of Bruce County

- Spontaneous Awareness vs. Other Counties
- Awareness of Specific Places in Bruce County
- Total Awareness
- Familiarity
- Overall Impression
- Image

Awareness, Familiarity and Overall Impressions of Bruce County



Ontario residents had high awareness and positive impressions of Bruce County, although only a minority felt that their level of familiarity was high. The County was seen as a friendly, traditional, rural area that was unique and, for many, exciting.

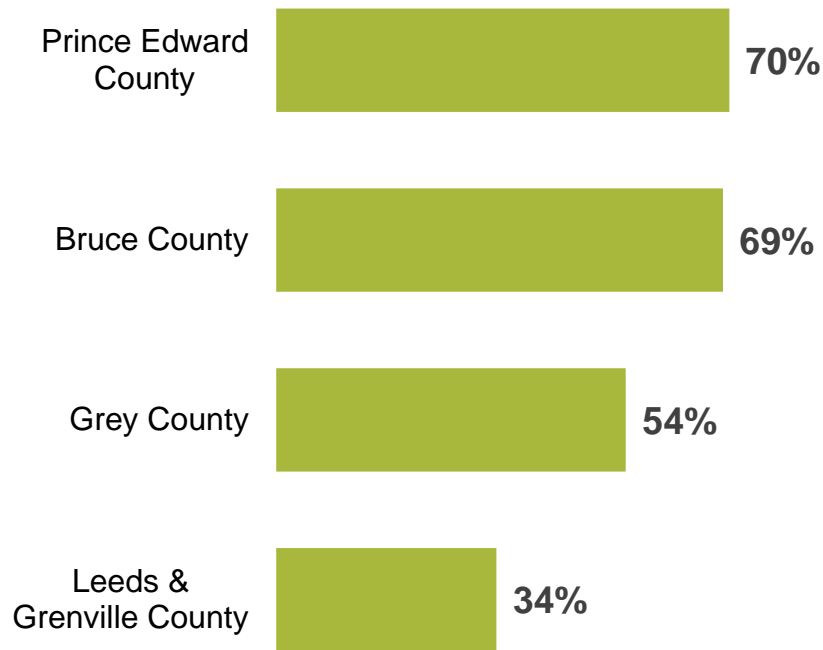


* Those with at least some familiarity were aware of the County and gave a score of >1 when asked to rate their own familiarity on a scale where 1=low

Spontaneous Awareness of Bruce vs. Other Counties



% Who Indicated They Had Heard of County in Question



Base: All respondents: n=505

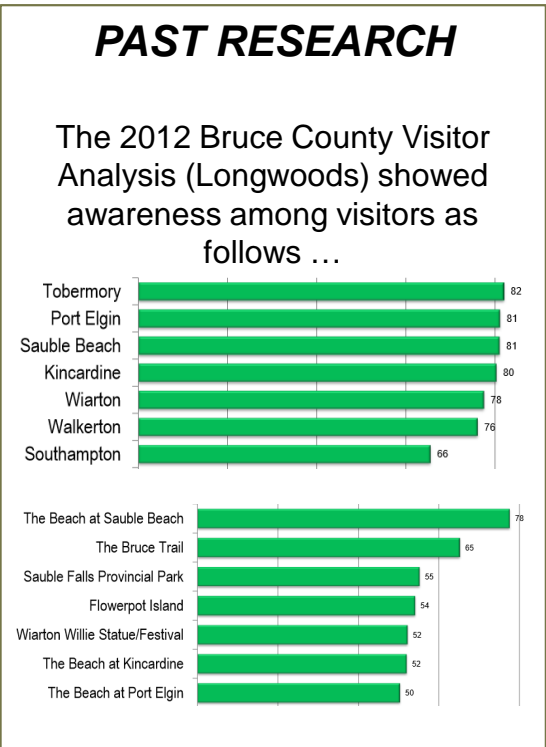
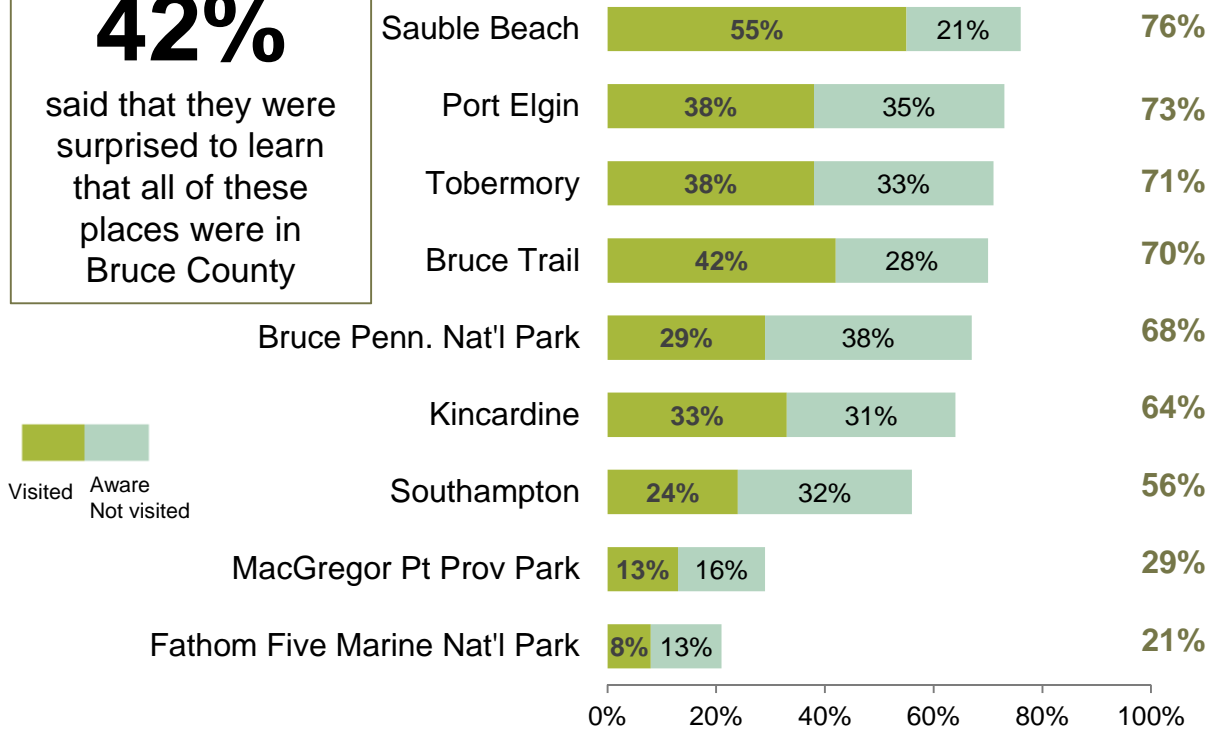
QB1: I am going to read the names of a few counties in Ontario. Please tell me whether or not you had heard of each one, before I mentioned it.

Awareness of Specific Places in Bruce County insights

% Who Had Heard of / Ever Visited Selected Place in Bruce County

42%
said that they were surprised to learn that all of these places were in Bruce County

% AWARE

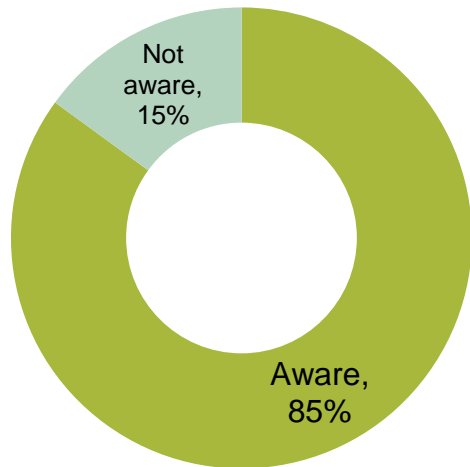


Base: All respondents: n=505

Q3a I am going to read a number of place names. For each, please tell me if you have heard of it and, if so, whether or not you have visited it.

Total Awareness of Bruce County

Total Awareness of Bruce County Spontaneous + Aided



Awareness of Bruce County for Sub-Groups

	REGION					AGE		
	Bruce	GTA	SW ON	Near North	Eastern ON	18-34	35-54	55-64
% Aware	100%	85%	91%	100%	71%	72%	87%	90%

relatively lowest awareness in Eastern ON followed by the GTA

awareness increased with age

Base: All respondents: n=505

Determination of Awareness

The following questions were used to understand how many respondents were aware of Bruce County – either spontaneously (said yes when asked if they had heard of it) – or when prompted with a description or told of places located in the County.

Spontaneously aware **69%**
Had you heard of Bruce County before I mentioned it?

+ Aided by description **11%**
You mentioned that you had not heard of Bruce County. It is sometimes simply called The Bruce, and is located northwest of Toronto or straight north of London, Ontario. The western edge of the County follows along the Lake Huron shoreline and the most northerly part of the County is the Bruce Peninsula, which extends into Georgian Bay.

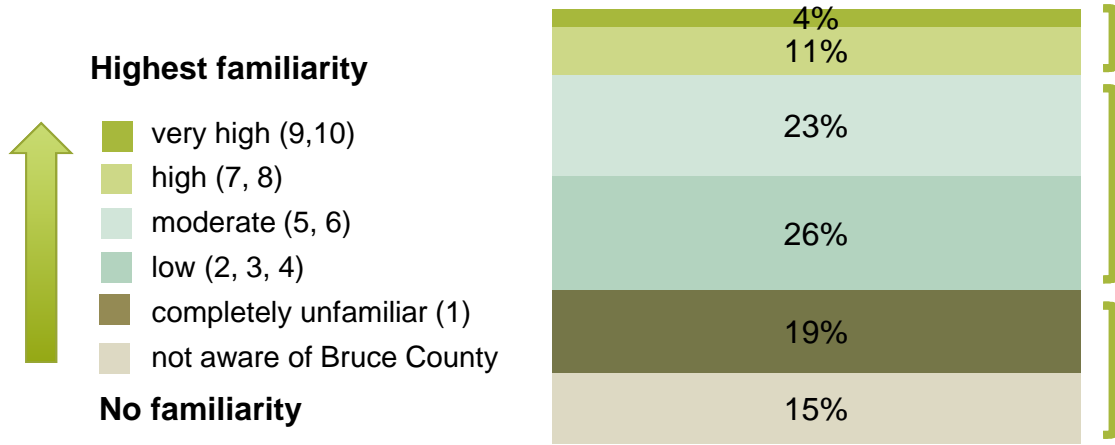
+ Aided by having heard of places in Bruce County **5%**
I know that you said you were not aware of The Bruce. Now that you know some of the places that are located in the County, however, would you say that you actually were aware of Bruce County?

= Total awareness..... **85%**

Familiarity with Bruce County

AVERAGE FAMILIARITY SCORE
3.6 (on 10)

% WITH AT LEAST SOME FAMILIARITY
65%



15% high or very high familiarity
49% low to moderate familiarity

35% completely unfamiliar

Later in the survey, these respondents were not asked to evaluate Bruce County

Average Familiarity Scores for Sub-Groups

	REGION					AGE		
	Bruce	GTA	SW ON	Near North	Eastern ON	18-34	35-54	55-64
Average score (on 10)	8.2	3.6	3.9	5.9	2.5	2.4	3.9	4.1

As with awareness, perceived familiarity was relatively lowest in Eastern ON, followed by the GTA ... and increased with age

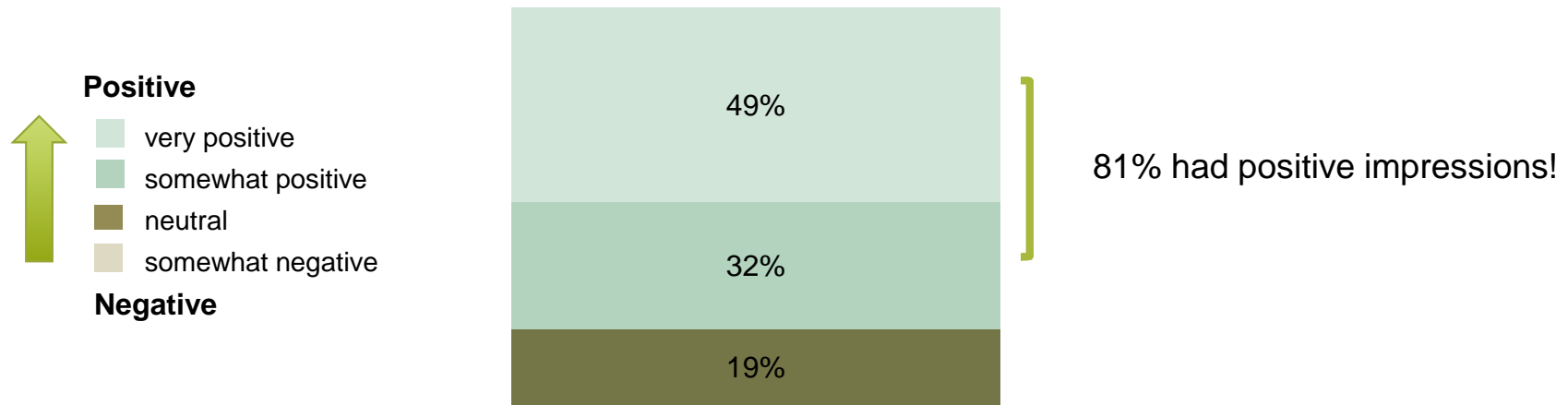
Base: All respondents – those who were unsure: n=503

QB5: On a scale from 1 to 10, where 1 is not at all familiar and 10 is very familiar, how familiar would you say that you are with Bruce County?

Overall Impression of Bruce County



Impression Among Those With at Least Some Familiarity With Bruce County



% with Positive Scores by Sub-Group

	REGION					AGE			VISITATION (by those familiar)		
	Bruce	GTA	SW ON	Near North	Eastern ON	18-34	35-54	55-64	past 5 years	longer ago	never
% positive	91%	79%	87%	83%	72%	66%	84%	83%	89%	66%	50%

Impressions were relatively least positive in Eastern Ontario, followed by the GTA ... and among the youngest age cohort.

Positive impressions increased with recency of visiting

Base: Those with at least some familiarity with Bruce County (aware and familiarity score >1): n=370
 QC2a: In general, is your impression of Bruce County:

Image of Bruce County

Choice of Descriptors for Bruce County

Read as: 92% felt that 'friendly' best represented Bruce County, 1% selected 'unsociable' and 7% felt that neither word was a good fit



Base: Those with at least some familiarity with Bruce County (aware and familiarity score >1): n=370
 QD3: I am going to read a pair of words and I would like you to tell me which one better fits with what you know of Bruce County.

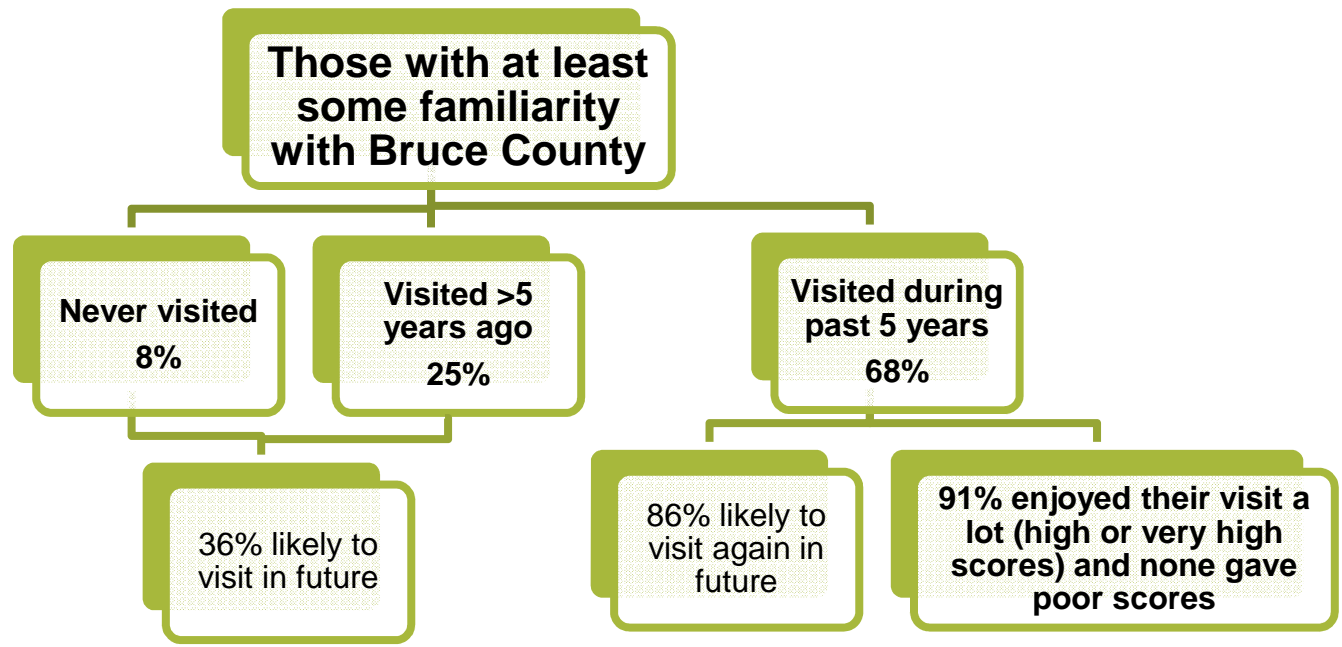
Visitation to Bruce County by Those Who Had Familiarity

Past Visitation
Future Likelihood of Visiting

Visitation to Bruce County by Those With Familiarity



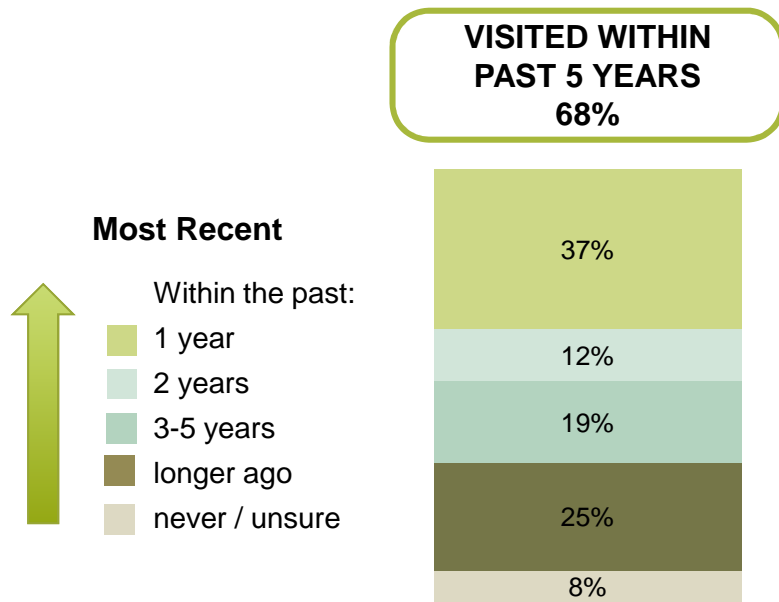
Those who had at least some familiarity with Bruce County had high levels of past five year visitation, enjoyment of their most recent trip and likelihood of returning.



Those from the near North and SW ON were more likely to have visited, followed by GTA residents ... with those from Eastern Ontario least likely. Incidence of visiting peaked in the 35-54 age group.

Past Visitation to Bruce County

Recency of Travel to Bruce County, Among Those Who Had at Least Some Familiarity With the County



Visitation Among Those With Familiarity for Sub-Group

	REGION					AGE		
	Bruce	GTA	SW ON	Near North	Eastern ON	18-34	35-54	55-64
% visited past 5 years	NA	65%	77%	86%	47%	66%	73%	58%

Near north and SW ON residents were most likely to have visited, followed by GTA ... with Eastern ON trailing.

The older respondents were least likely to have visited recently.

PAST RESEARCH

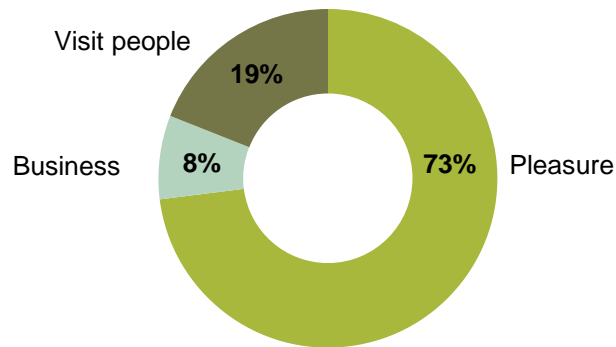
The 2012 Bruce County Visitor Analysis (Longwoods) says that:

The top source of visitors to Bruce County is Southwestern Ontario, which accounts for almost half of visitors, followed by the GTA, which provides 3 in 10 visitors.

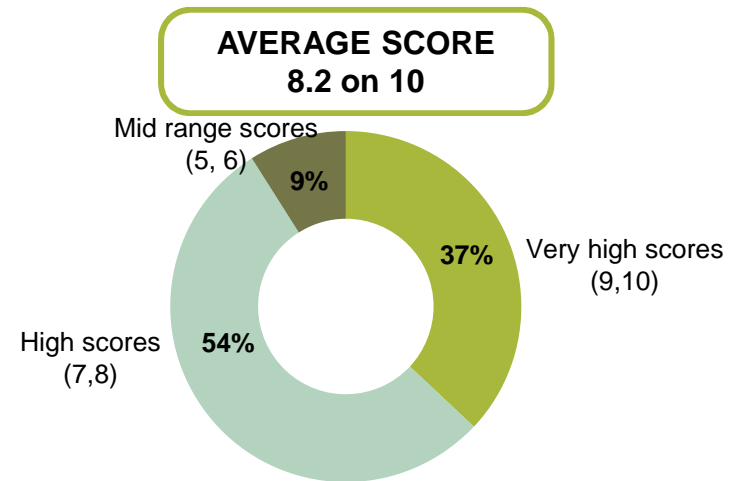
Base: For recency of travel, those who do not live in Bruce County but who had at least some familiarity with it (aware and familiarity score >1): n=293
 QB6: Was your most recent trip to Bruce County within the past

Past Visitation to Bruce County

Reason for Most Recent Trip, Among Those Who Had Visited the Bruce Within the Past Five Years



Extent to Which Most Recent Trip Was Enjoyed



PAST RESEARCH
2013 Consumer Insight Research for Bruce / Grey / Simcoe (TNS) showed a high degree of satisfaction with their trip among Ontario visitors
(average score of 8.7 on 10)

Base: Those who are aware and had at least some familiarity with Bruce County (aware and familiarity score >1) and who had visited within the past 5 years: n=196

QB7: What was the main reason for your most recent trip to the Bruce? Was it ...

QB8: Using a scale of 1 to 10 where 1 means 'not at all' and 10 means 'very much so', please rate the extent to which you enjoyed the Bruce.

Future Likelihood of Visiting Bruce County



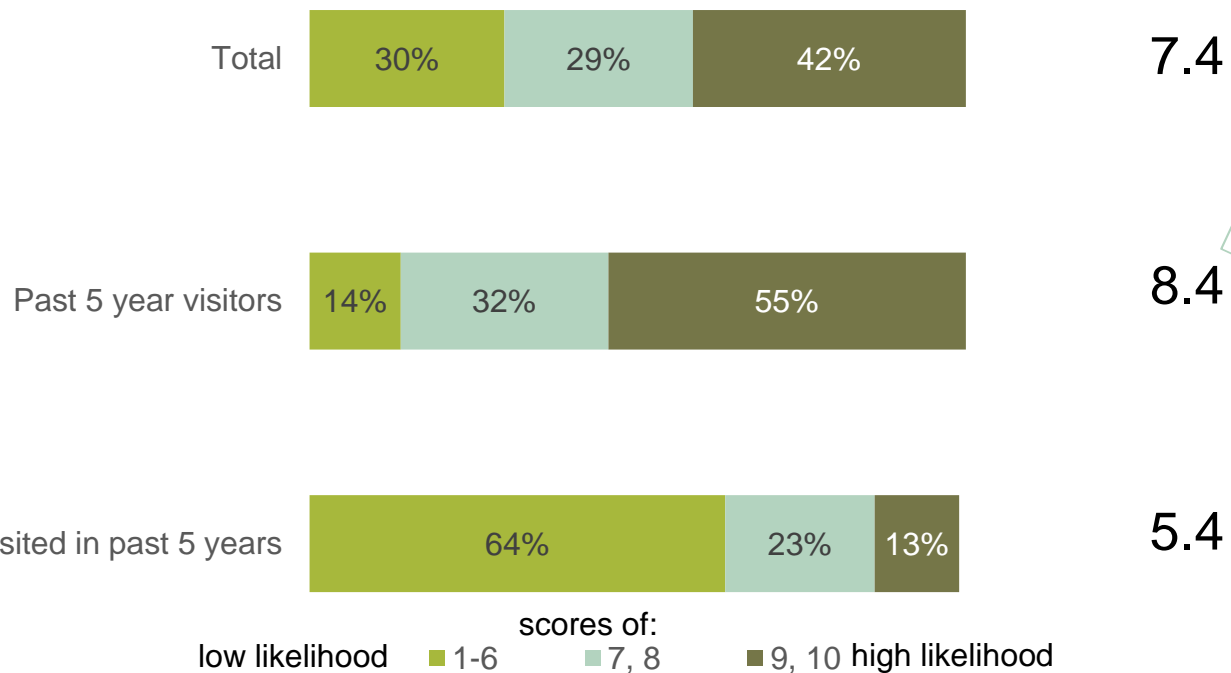
Likelihood of Visiting the Bruce in Future, Among Those Who Had at Least Some Familiarity With the County

PAST RESEARCH

The 2012 Bruce County Visitor Analysis (Longwoods) indicated a high likelihood of repeat visitation :

Interest in returning to the region is especially high among visitors to Bruce County, which suggests a very substantial level of satisfaction ... 74% of those who have visited this county indicate that they are planning to come again.

AVERAGE SCORE ON 10



Those who had visited recently were much more likely to anticipate visiting in future.

Base: For recency of travel, those who do not live in Bruce County but who had at least some familiarity with it (aware and familiarity score >1): n=293 in total (199 past 5 year visitors + 94 who had not visited in past 5 years)

QB9: Using a scale of 1 to 10 where 1 means 'not at all' and 10 means 'very much so', please indicate how likely you are to visit the Bruce in the future.

Evaluation of Bruce County

The Attributes

Perceived Importance of Attributes

Credibility of Attributes Applying to Bruce County

Importance vs. Credibility of Attributes

Means of Evaluating Importance and Credibility of Various Attributes

Factor	As described for importance rating	As described for credibility rating
Affordable	Relatively affordable housing and cost of living	SAME
Safe	Safe neighbourhoods	
Scenery	Impressive scenery and landscapes	
Dining/ theatre	Opportunities for fine dining, theatre and the like	
Work:life balance	Place where it is possible to have a better work: life balance	
Community feel	Place with a strong community feel	
Family oriented	Family oriented	
Local / rural	Easy access to local producers and a rural lifestyle	
Healthy	Healthy place to live	
Green living	Place where green or environmentally conscious living is easier	
Lots to see and do	Lots to see and do	SAME
Health care	Health care	
Education	Education	
Shopping	Shopping	
Like minded people	Meeting like-minded people	
Accessibility	Being able to get around easily to the places you want to go	

Credibility question
I am going to read a number of statements and I would like you to tell me the extent to which you feel each describes Bruce County. Please use our scale of 1 to 10, where 1 means 'not at all' and 10 means 'very much so'.

Credibility question for residents:
This next question also uses a scale of 1 to 10, where 1 means 'not at all' and 10 means 'very much so'. As a resident of Bruce County, please tell me the extent do you feel that your needs are being met when it comes to ...

for non-residents:
I would like you to imagine for a moment that you live in Bruce County. Please tell me the extent do you feel that your needs would be met ...

Importance question
*I would like to start by learning what would be important to you if you were considering moving to a new community. Using a scale of 1 to 10, where 1 means 'not at all' and 10 means 'very much so', please indicate how important **READ ITEM** would be to you*

Means of Evaluating Importance and Credibility of Various Attributes

Factor	As described for importance rating	As described for credibility rating
Hunting / fishing	Easy access to outdoor activities such as hunting, fishing and snowmobiling	Outdoor enthusiasts who enjoy hunting, fishing and snowmobiling
Outdoor sports	Easy access to sports such as hiking, rock climbing, mountain biking, skiing or snowboarding	People who enjoy sports such as hiking, rock climbing, mountain biking, skiing or snowboarding
Nature	Being close to nature	Nature lovers
Beaches	Nearby beaches, boating and water sports	Those who love beaches, boating and water sports
Dining/ theatre	Opportunities for fine dining, theatre and the like	People who enjoy fine dining, theatre and the like
Museums/ galleries	Easy access to museums and galleries, and opportunities to learn about the history and culture of the place	Those who like to visit museums and galleries, and learn about the history and culture of a place
Green living	Place where green or environmentally conscious living is easier	Someone who is environmentally conscious and into green living

Credibility question
How suitable do you feel that Bruce County would be as a place to LIVE for each of the following groups. Please stick with our ten point scale, this time where 1 means 'not at all suitable' and 10 means 'extremely suitable'

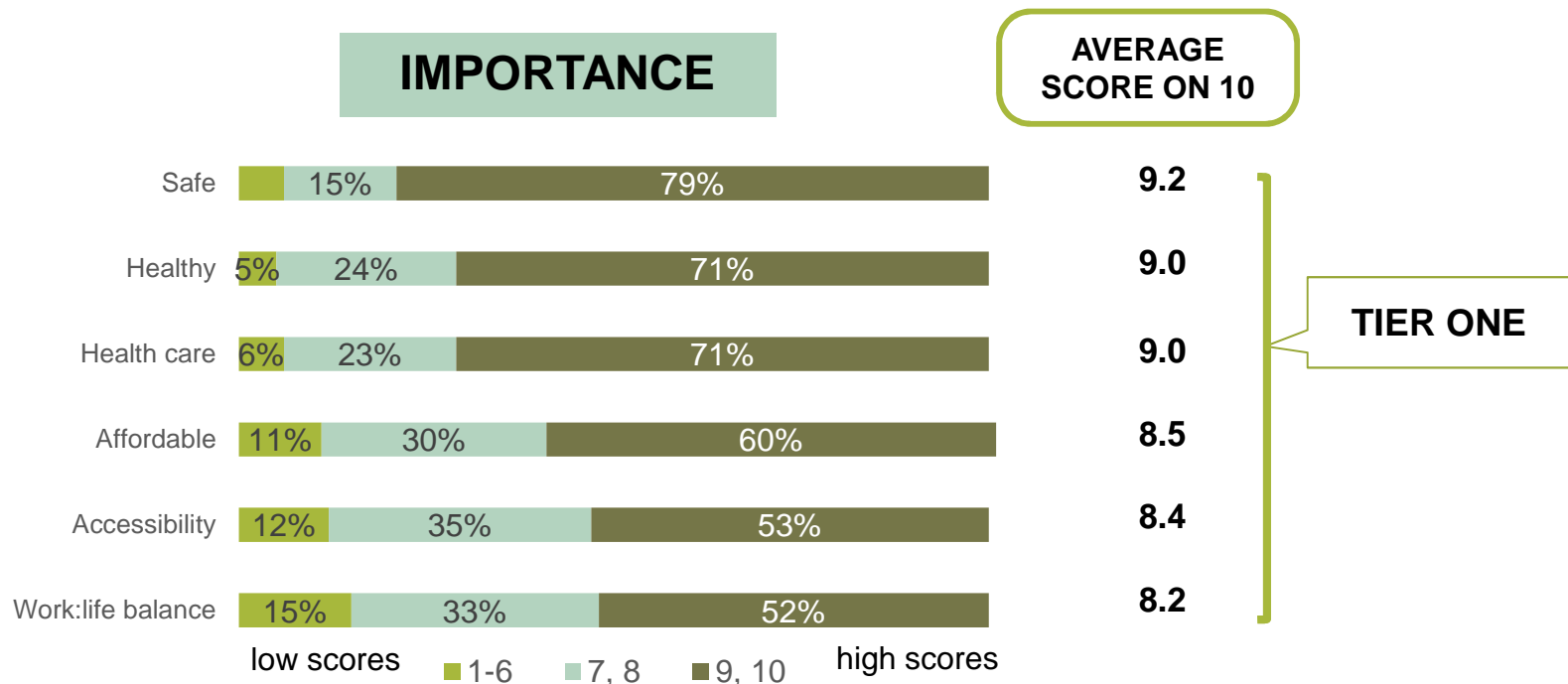
Importance question
*I would like to start by learning what would be important to you if you were considering moving to a new community. Using a scale of 1 to 10, where 1 means 'not at all' and 10 means 'very much so', please indicate how important **READ ITEM** would be to you*

OVERALL ...

Respondents were asked to evaluate the same set of factors in terms of what was important to them when selecting a place to live and what Bruce County had to offer ... and there was something of a disconnect. Most core needs – specifically, access to health care, affordability, ease of getting around and work:life balance – received relatively low credibility scores for Bruce County, with ~40-45% giving the County low scores (<7/10). In contrast, the attributes with the highest level of credibility related primarily to nature and the recreational opportunities associated with it ... and were relatively lowest in terms of importance when selecting a place to live. This is not to say that they were unimportant but, rather, to say that prospective residents would first need to be convinced that their core needs would be met.

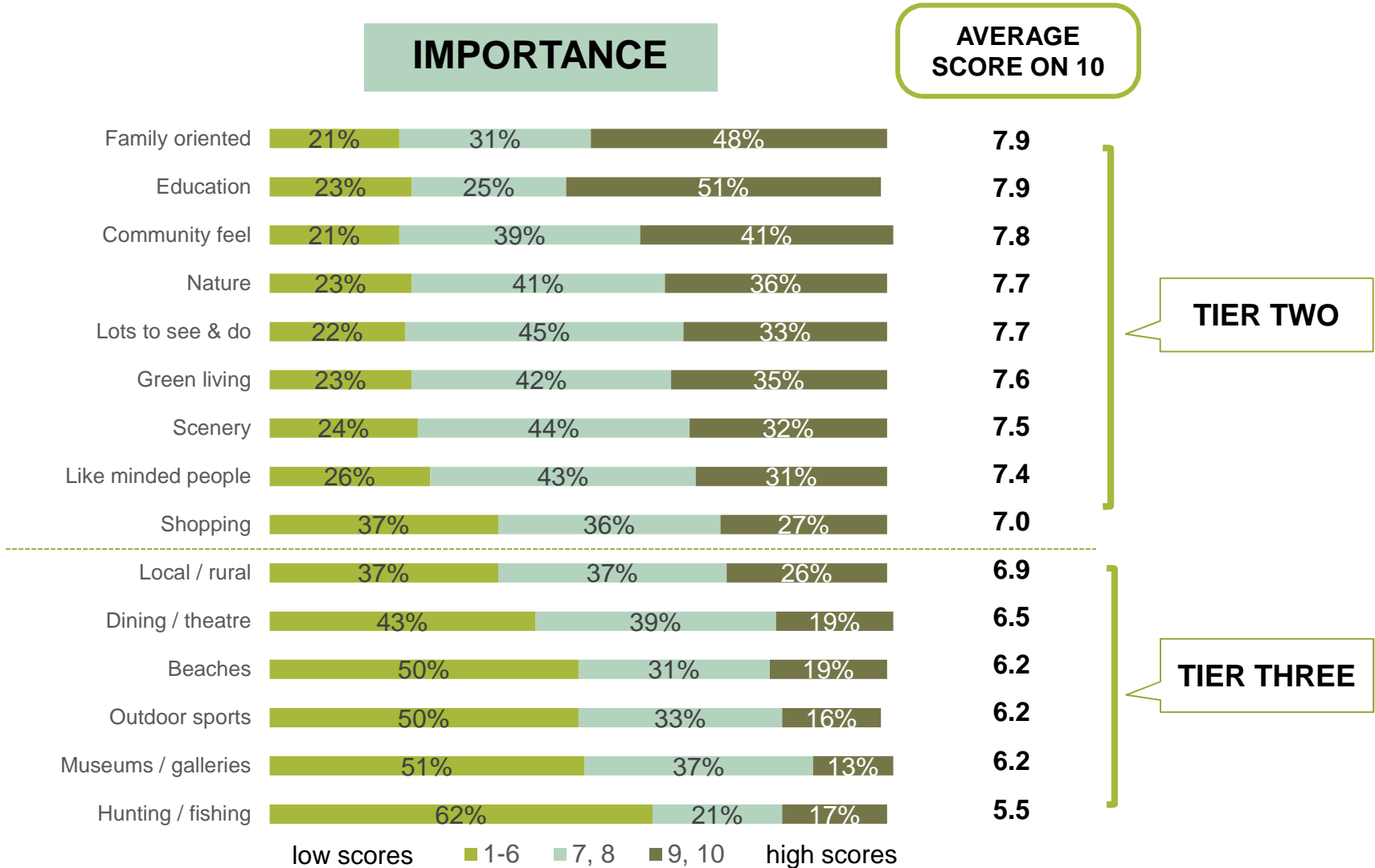
Perceived Importance of Attributes

- Respondents were asked how important various things would be to them, presuming that they were to move to a new community. The Tier One attributes – those of greatest importance – related to health and safety, affordability, ease of getting around and work:life balance.
- Tier Two factors tended to relate to the social environment, education and lifestyle ... while access to pastimes and attractions occupied the relatively less important Tier Three.



Base: All respondents – those who were unsure: n=505 at most

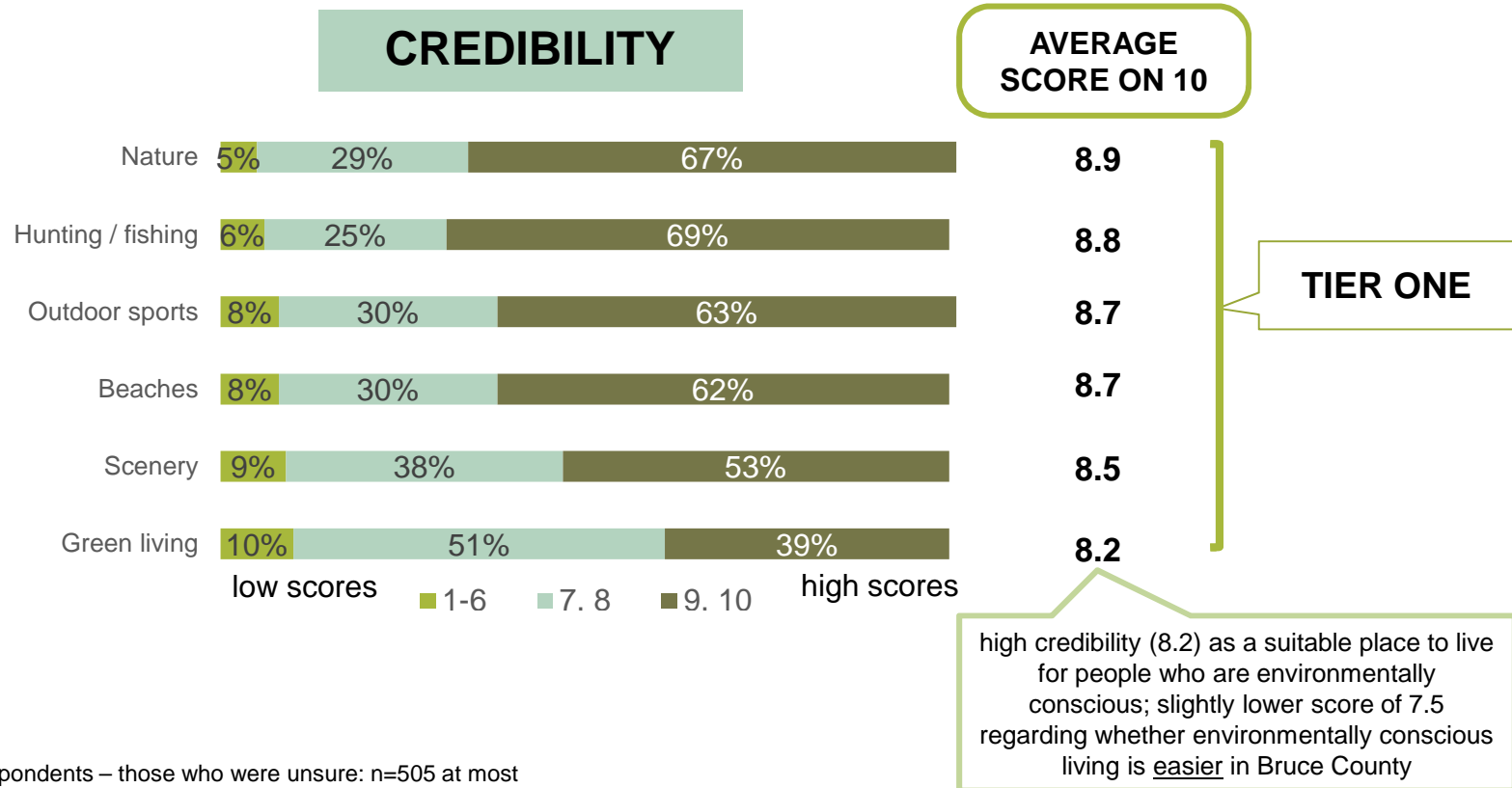
Perceived Importance of Attributes



Base: All respondents – those who were unsure: n=505 at most

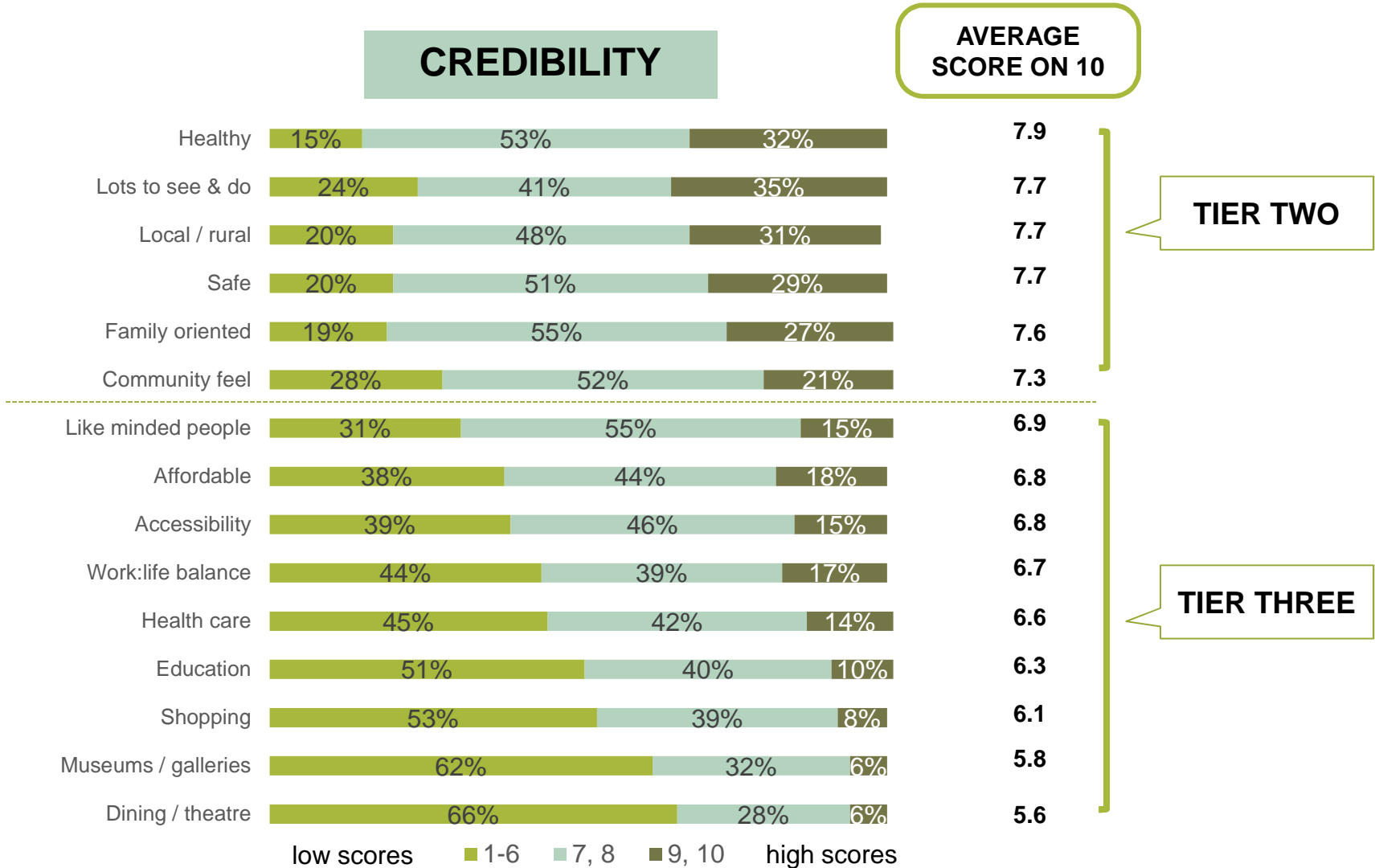
Perceived Credibility of Attributes

- The attributes most strongly associated with Bruce County related to the natural environment and recreational opportunities that went along with it. Tier Two attributes related more to community, and encompassed the role of local/rural, being family oriented, safety and community feel ... while core needs such as affordability, accessibility, health care and education tended to be relegated to Tier Three. In other words, a considerable proportion of respondents was not convinced that Bruce County would deliver on these needs.



Base: All respondents – those who were unsure: n=505 at most

Perceived Credibility of Attributes

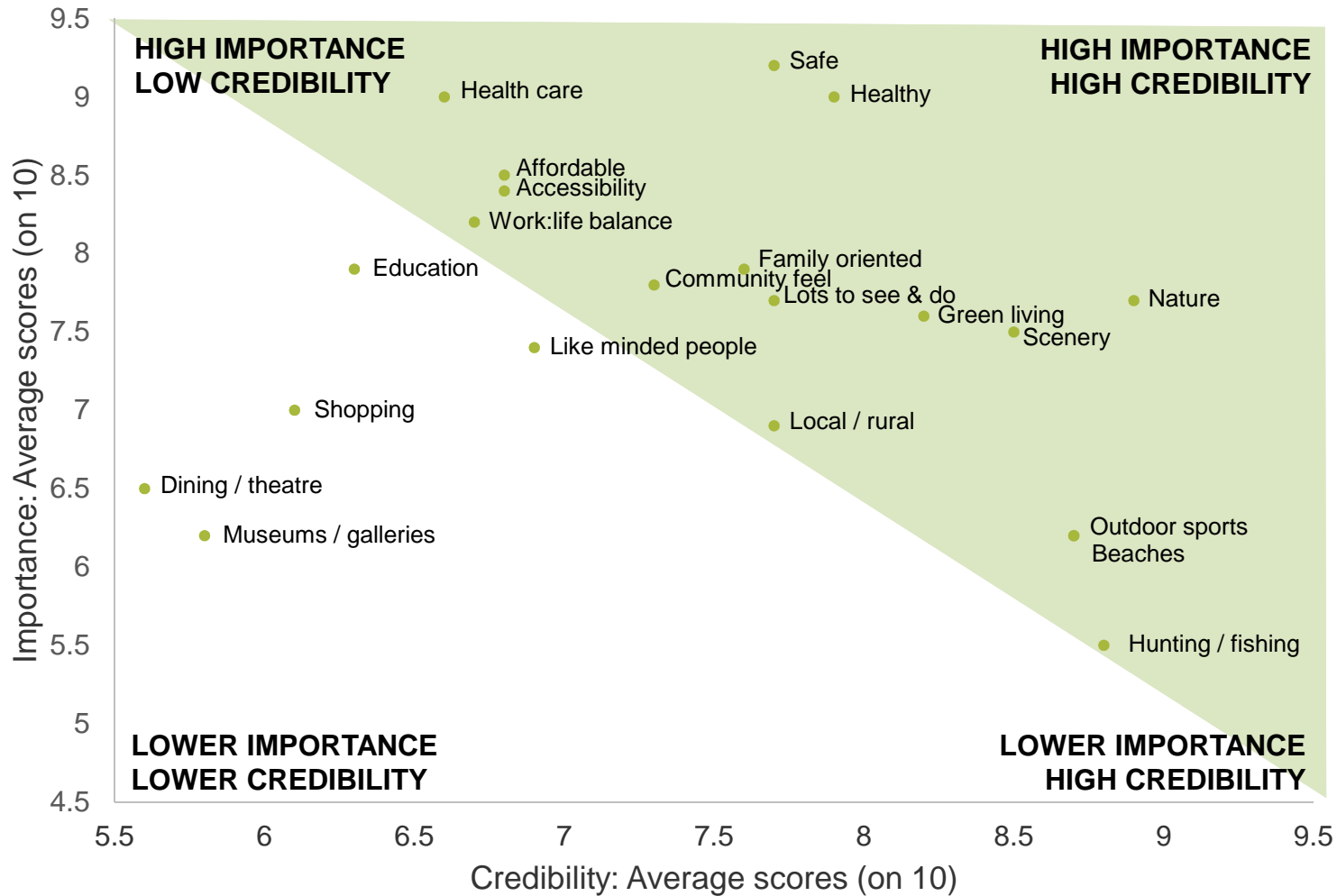


Base: Those with at least some familiarity with Bruce County (aware and familiarity score >1) – those who were unsure: n=370 at most

Importance vs Credibility of Various Attributes



IMPORTANCE VS. CREDIBILITY



Importance vs. Credibility of Various Attributes



Average Scores for Importance and Credibility of Attributes

		Importance				Credibility			
		Total	18-34	35-54	55-64	Total	18-34	35-54	55-64
IMPORTANCE TIER ONE	Safe	9.2	9.2	9.2	9.1	7.7	6.7	7.9↑	7.7↑
	Healthy	9.0	9.0	8.9	9.0	7.9	7.1↓	8.1	7.8
	Health care	9.0	9.3↑	8.8	9.1↑	6.6	6.2	6.9↑	6.3
	Affordable	8.5	8.6	8.5	8.5	6.8	6.1	6.9	7.0
	Accessibility	8.4	8.3	8.2	8.8↑	6.8	6.3	7.0	6.9
	Work:life balance	8.2	8.7↑	8.3↑	7.7	6.7	5.6↓	7.0	6.6
	Family oriented	7.9	7.9	8.1↑	7.5	7.6	6.7↓	7.9	7.7
IMPORTANCE TIER TWO	Education	7.9	9.1↑	7.9↑	6.6	6.3	5.5↓	6.5	6.3
	Community feel	7.8	7.4	7.8	8.1↑	7.3	6.8	7.6↑	7.2
	Nature	7.7	7.3	7.8	7.6	8.9	8.6	8.9	8.9
	Lots to see & do	7.7	8.0	7.7	7.6	7.7	7.1↓	7.7	7.9
	Green living	7.6	7.5	7.7	7.6	8.2	7.8	8.3	8.1
	Scenery	7.5	7.2	7.6	7.8	8.5	7.8	8.6	8.7
	Like minded people	7.4	7.7	7.3	7.3	6.9	6.2↓	7.0	7.1
IMPORTANCE TIER THREE	Shopping	7.0	7.2	6.8	7.2	6.1	5.3↓	6.2	6.4
	Local / rural	6.9	6.5	7.2↑	6.8	7.7	6.3↓	7.9	7.9
	Dining / theatre	6.5	7.1↑	6.4	6.2	5.6	5.1	5.7	5.6
	Beaches	6.2	5.9	6.3	6.1	8.7	8.3	8.8	8.7
	Outdoor sports	6.2	6.3	6.5	5.3↓	8.7	8.3	8.8	8.8
	Museums / galleries	6.2	6.4	6.0	6.2	5.8	5.6	5.9	5.8
	Hunting / fishing	5.5	5.7	5.8	4.7↓	8.8	8.8	8.8	8.9

higher value on health care, accessibility; lower on outdoor activities

lower credibility with youngest age groups

Base: Total: n=505; 18-34: n=66; 35-54: n=271; 55-64: n=168

Perceived Suitability of Bruce County as a Place to Live, Work and Vacation

Perceived Suitability of Bruce County as a Place to Live, Work and Vacation



Bruce County was endorsed relatively most strongly as a vacation destination, secondly as a place to live, and least enthusiastically as a place to work or have a business.

- Average scores (where 10 was highest) reflecting the perceived suitability of Bruce County as a place to live, work and vacation were:
 - vacation..... 7.9
 - live..... 7.3
 - work..... 6.1
 - have a business 5.8

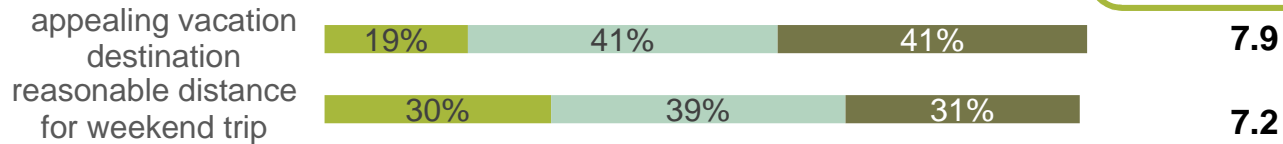
FOR:	
empty nesters / retirees	7.8
young families	7.2
families with teens & older	6.3
young adults / no families	6.3

Perceived Suitability of Bruce County as a Place to Live, Work and Vacation

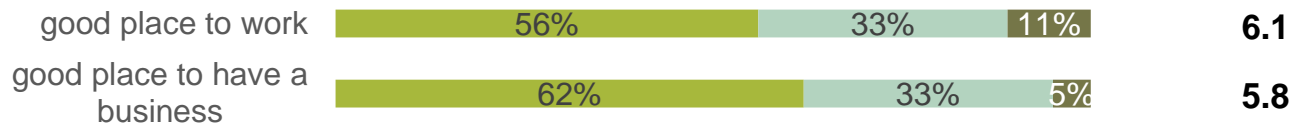


AVERAGE SCORE ON 10

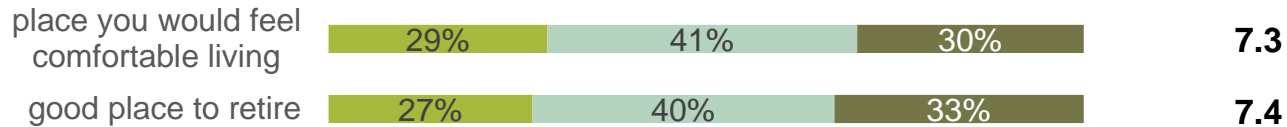
VACATION



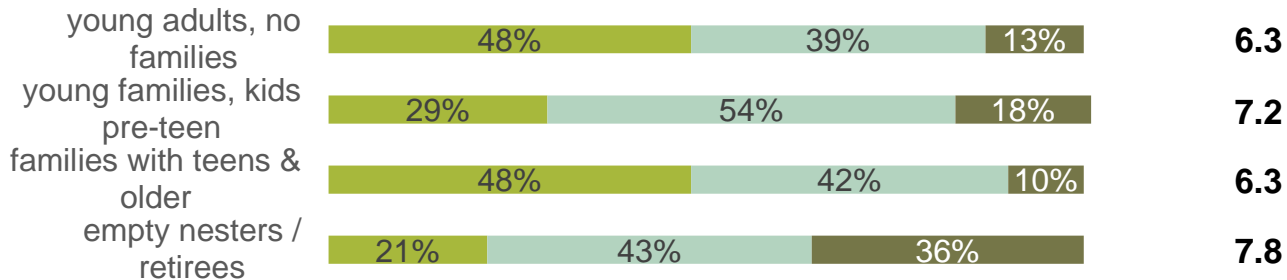
WORK



LIVE



suitable for:



low scores ■ 1-6 ■ 7, 8 ■ 9, 10 high scores

QD1: I am going to read a number of statements and I would like you to tell me the extent to which you feel each describes Bruce County. Please use our scale of 1 to 10, where 1 means 'not at all' and 10 means 'very much so'.

QD4: How suitable do you feel that Bruce County would be as a place to LIVE for each of the following groups. Please stick with our ten point scale, this time where 1 means 'not at all suitable' and 10 means 'extremely suitable'.

Base: Those with at least some familiarity with Bruce County (aware and familiarity score >1) – those who were unsure: n=370 at most; note that those who live in Bruce County were not asked about proximity for weekend trip (under 'vacation')

Perceived Suitability of Bruce County as a Place to Live, Work and Vacation



Average Suitability Scores by Region of Residence and Age

	Total	REGION					AGE		
		Bruce	GTA	SW ON	Near North	Eastern ON	18-34	35-54	55-64
VACATION									
appealing vacation destination	7.9	8.6	7.7↓	8.3	8.7	7.3↓	6.8↓	8.8	8.1
reasonable distance for weekend	7.2	NA	7.4	7.5	8.3↑	5.3↓	7.4	7.2	7.1
WORK									
good place to work	6.1	8.4↑	6.0	6.4	6.1	5.7	4.8↓	6.5	6.0
good place to have a business	5.8	7.2↑	5.8	5.9	5.9	5.8	5.0	6.1↑	5.8
LIVE									
place you would feel comfortable living	7.3	9.4↑	7.3	7.6	7.7	6.7↓	6.6↓	7.5	7.3
good place to retire	7.4	8.6↑	7.5	7.3	8.4↑	6.7	7.3	7.6	7.1
suitable for:									
young adults, no families	6.3	6.8↑	6.2	6.7↑	6.4	5.8	6.3	6.5	6.0
young families, kids pre-teen	7.2	8.3↑	7.2	7.4↑	7.2	6.7	7.0	7.3	7.1
families with teens & older	6.3	7.2↑	6.2	6.6	6.6	6.0	5.9	6.5	6.2
empty nesters / retirees	7.8	8.4↑	7.8	7.9	8.2↑	7.3	7.9	7.9	7.5

most positive

least positive

least positive

Base: Those with at least some familiarity with Bruce County (aware and familiarity score >1) – those who were unsure: n=370 at most; note that those who live in Bruce County were not asked about proximity for weekend trip (under 'vacation')

Perceived Strengths and Concerns

Strengths
Concerns

Perceived Strengths and Concerns

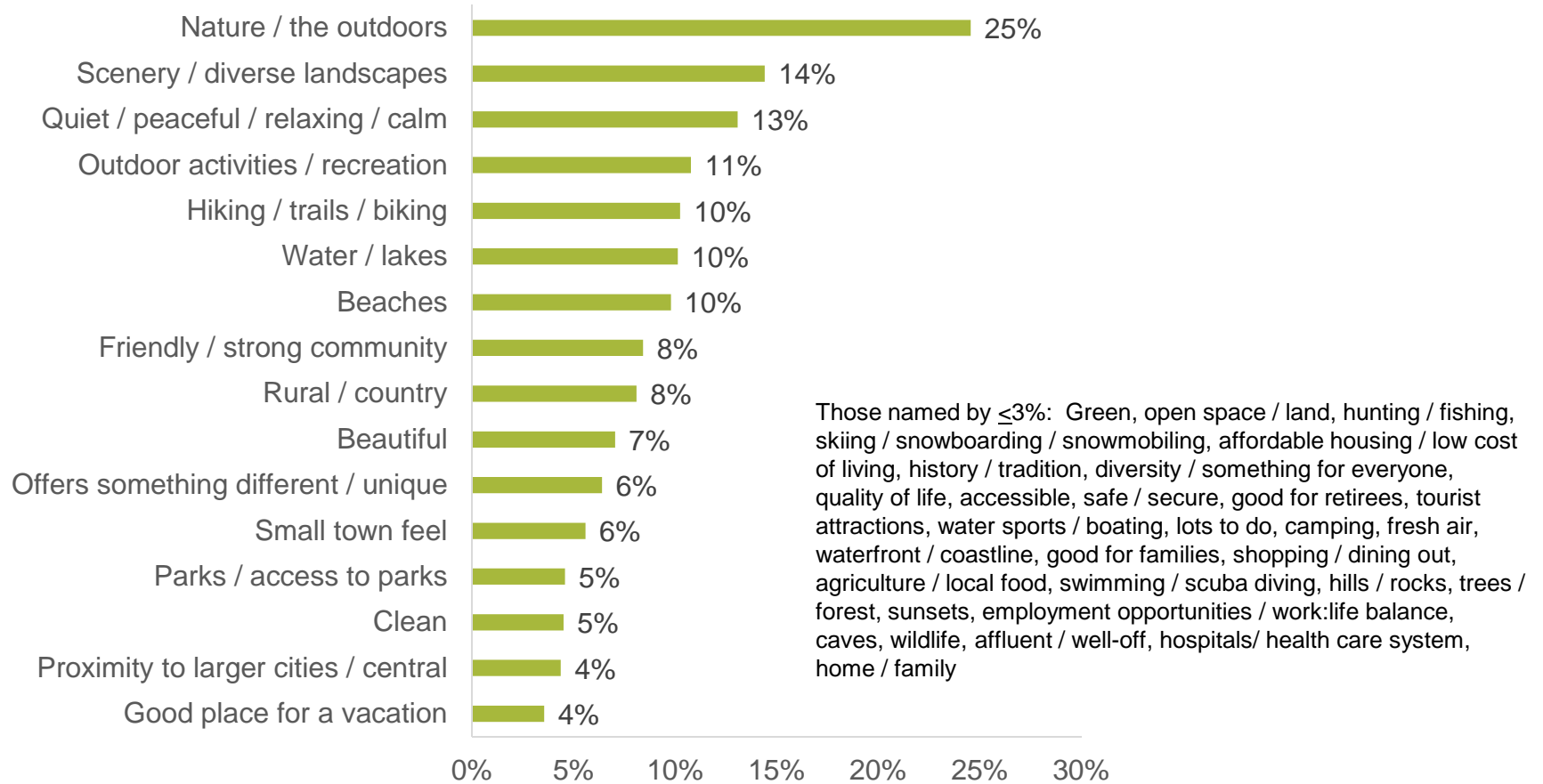


Key strengths of Bruce County, unaided, tended to revolve around the natural environment: the scenic beauty and outdoor recreational opportunities. Community and the peacefulness of the rural setting also emerged as themes. Concerns, to the extent that they existed, related to geographic isolation, a perceived lack of access to health care and limited economic opportunities.

Perceived Strengths



STRENGTHS, UNAIDED



Base: Those with at least some familiarity with Bruce County (aware and familiarity score >1) – those who were unsure: n=370 at most
 QD5a: The purpose of our research today has been to help Bruce County understand what people think of the County and to learn whether they feel that it has any unique strengths. What do you think Bruce County has to offer that you cannot easily find in other parts of Ontario, and that might encourage people to live, work or vacation there?

STRENGTHS, IN THE WORDS OF THE RESPONDENTS

It is the beaches and the nature and that kind of stuff. You can get it at other places, but when I think of their parks you can't beat it. The peninsula specifically is very nice.

The clean water aspect and the nature hikes that go along with that. And no congested traffic. It is a less stressful environment

The sunsets, the nature ... I love both of the towns of Southampton and Port Elgin. We'll be retiring there soon.

Biking, hunting, fishing, snowmobiling, big skies - there's so many things. Peace and quiet, nice people - very friendly and open, good sense of community.

Quiet and serene - you can see the stars at night.

Definitely it is the unique natural surroundings.

Proximity to the water. Little more casual. Friendly. Great summer place.

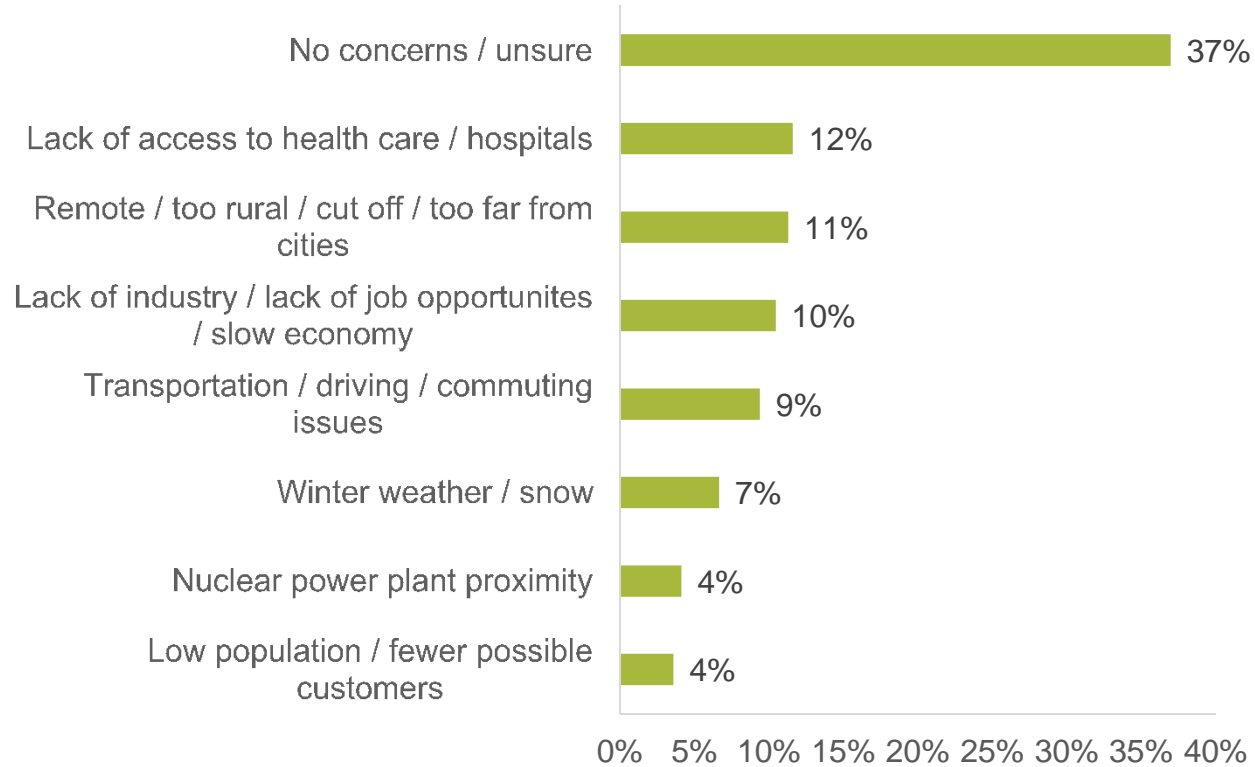
A variety of things to do, safe environment, ability to have a better grasp of work life balance, lots of things to see and do, cost of living, peace and quiet.

It's for non metropolitan living ... it's a simple lifestyle but at the same time there is a lot of expensive cottages – therefore it is a affluent and seasonal ... It is basic country living

Good retirement area for people coming from the city ... and good for pre-school kids/families.

Perceived Concerns

CONCERNS, UNAIDED



Those named by $\leq 3\%$: Lack of education opportunities, lack of shopping / dining choices, lack of entertainment (e.g. children / teens would get bored), lack of infrastructure – roads / bridges / parking, low income / high cost of living, can only support seasonal business, lack of accessibility for seniors, possible overdevelopment / overcrowded, vacation atmosphere, wind turbines are disruptive, pollution (general), reputation of locals / local politics, no family in area / no connection to area, lack of housing, drug-related crime, poor recycling program / awareness

Base: Those with at least some familiarity with Bruce County (aware and familiarity score >1) – those who were unsure: n=370 at most
QD5b: What, if any, concerns would you have about Bruce County as a place to vacation, live, work, retire, or have a business?

CONCERNS, IN THE WORDS OF THE RESPONDENTS

Need more doctors, need more jobs, and need more things for teens and kids to do. It might be tough for businesses. There isn't a huge population outside of tourist months. I don't think there is enough nice dining and I don't think it would support professional career advancement.

The population base is declining and demographic change is heavily towards the older generations. Lack of post secondary access and health care accessibility.

Access to healthcare, hospitals and transportation as well as essential services.

I would for sure never do anything else there, but vacation. It's too remote and limited access to other amenities other than nature.

It doesn't have enough to do or places to go in terms of shopping and galleries. From what I know it doesn't seem like it has enough. Bruce County is basically vacation spot.

If I was going to retire I wouldn't go there because during the winter it must be very cold and everything is closed during fall and winter

I think for people who are looking to retire health care would be an issue. Access to schools and hospitals for the elderly. For young people, access to employment. Accessibility to a vehicle.

The nuclear plant and wind turbines.

Reaction to Concept Statements Describing Bruce County

The Concept Statements
Evaluation of the Concept Statements

The Concept Statements



- At the conclusion of the survey, respondents were asked to evaluate three concept statements:
 - firstly in terms of appeal (how appealing each was to them personally);
 - secondly in terms of credibility (extent to which they felt the statement was true of Bruce County).

- ‘Simplify Life’ was extremely appealing; it drew high scores from ~85%, while the others received high scores from ~70%.
- ‘Close to Nature’ had the strongest credibility with high scores from ~80% ... but the others followed closely.

Close to Nature

Living in an active outdoor oriented community with easy access to a unique and appealing blend of big water, small streams and world-class trails through a World Biosphere Reserve

HIGHEST CREDIBILITY,
JUST BARELY

Simplify Life

Living an active life in a place with a lower cost of living that allows you to simplify your life and reduce stress on yourself and your family

MOST APPEALING BY
QUITE A MARGIN

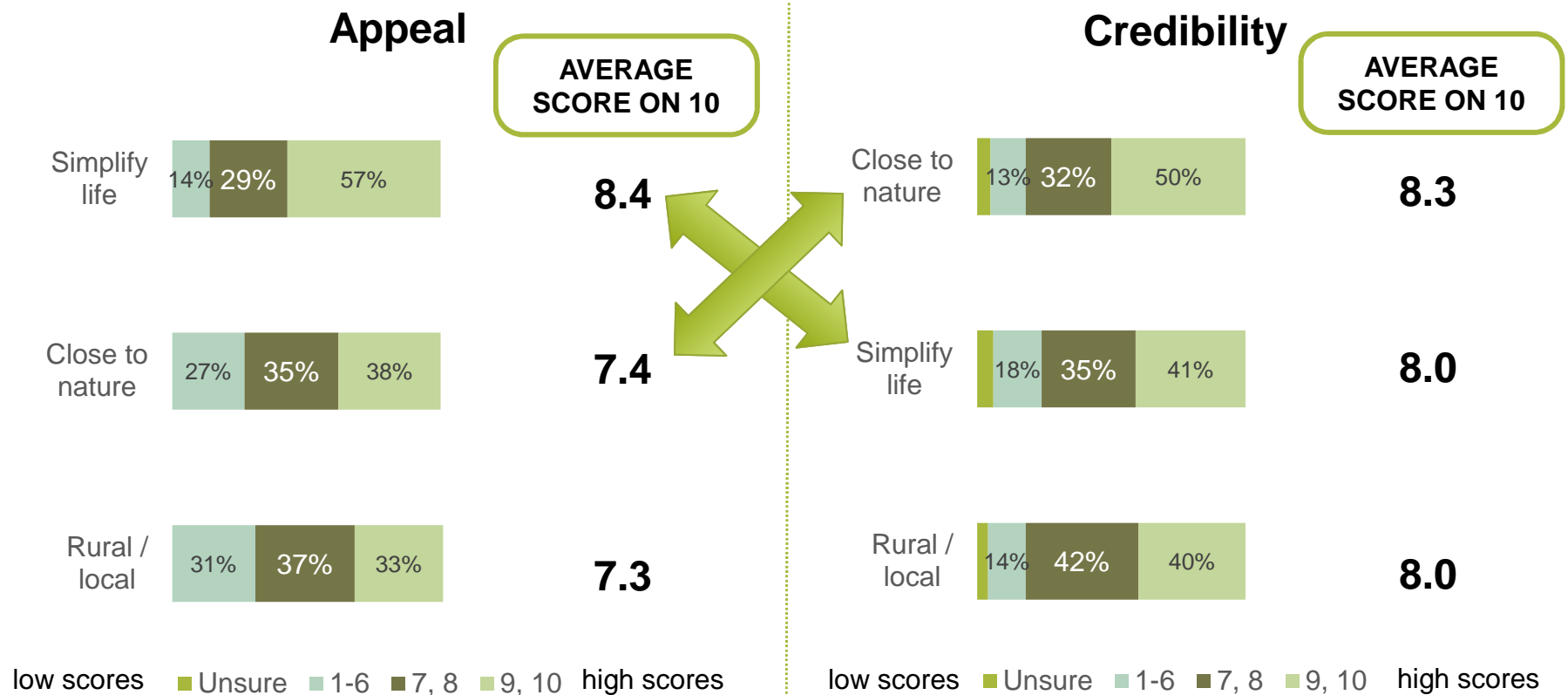
Rural / Local

Rural living that blends more space, country kitchens and a closer connection to agriculture with the convenience of close-knit communities, shopping and family-friendly services

Evaluation of the Concept Statements



Concept Evaluation



Base: For appeal: All respondents: n=505; for Appeal <.5% were unsure

For credibility: those who were aware of Bruce County: n=447

QV1: I am going to read some statements that describe different lifestyles, and I would like you to tell me how much each appeals to you. Please continue to use a ten point scale, where 1 means 'not at all appealing' and 10 means 'extremely appealing'.

QV2: I am going to read those same statements again, and this time I would like you to choose the number from one to ten - where 1 means 'not at all' and 10 means 'very much so' - that indicates the extent to which you feel that the statement is true of Bruce County.

4 INPUT FROM COMMUNITY MEETINGS

Themes from Community Discussions
Personality of Bruce County
Living in Bruce County
Brainstorming the New Bruce Brand

MAIN THEMES

1. Bruce County is **best known for its geography**: the splendour of its natural landscapes. This is seen as a key driver for all who come there.
2. **There are many distinct differences across the County**; this translates to a unique strength, particularly for tourism and, secondarily, for those living in the area ... but adds a layer of difficulty to creating a brand identity.

There's more energy – more activity and options - than in a purely agricultural rural area.

Come here and you can have a different vacation every day! Diversity is a big attractor.

- **Geographic variation**: *Beaches on one side, cliffs on the other, and farmland in between ... from the cottages of Southampton to the rural interior to the recreational mecca that is the Peninsula.*
- **Wide range of experiences**: varying ways to interact with nature including beaches; observing the natural environment (scenic beauty, naturalists); pursuits such as hunting, fishing, snowmobiling; sports such as hiking, climbing, skiing and so on
- **Cultural variation**: *It's a real melting pot. We have the Metis culture, Mennonites ... farmers and professionals from Bruce Power ... generational and seasonal residents.*
- **Economic differences**: from affluent areas on the Huron shore to the struggles of the Central Bruce; from economic engines as diverse at Bruce Power as an employer to agriculture, small business and tourism.

MAIN THEMES ... continued

- 3. Tourism** was largely seen as a success story – to the point that the some attractions on the Peninsula, such as the Grotto, had been turning people away during peak periods.

People are coming from all over the world, and tourism has been growing.

Contributors to success were the natural resource and recreational opportunities, marketing efforts, easy access to major Ontario markets, and the fact that is it considered to be affordable. Challenges included extending the season and developing interest and opportunities in Central Bruce.
- 4. Running a business** in Bruce County was considered to be challenging, and the groups did not feel that there had been growth in this sector. The seasonality of the tourism industry coupled with the relatively limited permanent population made it difficult to succeed, and participants felt that it was difficult to obtain financing to start a new business. Moreover, poor internet services were seen as a significant barrier to working remotely from the Bruce. The community offered this advice to those attempting to start a business in the area.

Find a niche, have a plan, and make connections. You have to fill a need that competitors are not addressing. It helps to be unique and, for tourism, it is all about experiences – rock climbing, night skies, local food
- 5. Bruce Power** plays an important role in the County, creating economic stability as a significant employer. While many were very positive about nuclear as a progressive energy source, there was also awareness that the general public might regard it with apprehension.

MAIN THEMES ... continued

6. The groups agreed that **living in Bruce County** was not for everyone and felt that the type of person who would be happiest there would be someone who:
- enjoys nature and outdoor activity;
 - prioritizes family;
 - likes social interaction and wants to participate actively in a community;
 - is satisfied with / hopes for a simpler life.

The County was seen as particularly appealing as a **place to raise a family, and to live once your family had left home**. Although it had considerable appeal as a place for **retirees** to settle, barriers included access to specialized medical care, pressures on long term care, mobility, and the inhospitable winters.

The County was said to be of relatively **least appeal to young adults** – both because of a dearth of jobs and because it was often not seen as fitting with the desired lifestyle for this age group.

When you're 18, you are dying to get out of here. And there is no university here anyway, so you have to leave if you want to do that.

We are losing the new generation; there is nothing here for them.

Nonetheless, young people were seen as the key target audience for recruitment of new residents – and those who had grown up in the area, or in another rural area, were seen as prime prospects.

It's a coming home thing. Once you have a family, you are drawn back – and you understand the benefits and appreciate the lifestyle.

Attracting young people, and jobs for young people, is a number one issue for us.

Personality of Bruce County



Diverse natural environment	<ul style="list-style-type: none">• Beautiful, picturesque• Rugged, raw• Inspiring	<p>The Peninsula is just unbelievable – take your breath away spectacular!</p>
Water	<ul style="list-style-type: none">• Shoreline, lake• Sunsets• River runs through it• Marine heritage	
Rural, agriculture	<ul style="list-style-type: none">• Pastoral• Local food, farmgate• Resilient, strong, proud	
Environmentally friendly	<ul style="list-style-type: none">• Green – literally and figuratively• Clean water, swimmable• Eat the fish• Nuclear	
Community	<ul style="list-style-type: none">• Friendly, welcoming, inviting• Down home• Warm, approachable• Plaid shirt	
Outdoors	<ul style="list-style-type: none">• Active, recreation• Sports• Bruce Trail, hiking• Fishing	
Simplicity	<ul style="list-style-type: none">• Quiet• Laid back, casual• Relaxing, fun• Basic; unpolished, not commercialized	
Isolated	<ul style="list-style-type: none">• Desolate / sleepy in winter	

ADVANTAGES

NATURAL ENVIRONMENT

- Beauty and access to outdoor activities
- Healthier lifestyle: proximity of activities, clean air and water

COMMUNITY

- Known as an individual, supportive community
- Authentic friendliness and caring
- Safe: kids walk to school, play outdoors – live a real, not virtual life
- Opportunities to volunteer / contribute

SIMPLICITY

- Less traffic, shorter commute, more personal time: easier to achieve better work:life balance
- Greater sense of freedom, spontaneity
- Slower pace, competitive for kids' sports / careers: opportunity to excel and be recognized
- Quiet, peaceful

OBSTACLES

- Limited job opportunities
- Need to have a car, must travel for some activities
- No university, programs and activities offered by some schools are limited
- Some shopping and services limited, especially in off-season
- Not certain that new people would be made to feel at home from the outset

BRAINSTORMING THE NEW BRUCE BRAND THE CHALLENGE:

The groups were asked to think about ideas that could form the core of the new Bruce brand: concepts that were true, unique and potentially interesting / motivational for the target audiences – that is, visitors as well as existing and potential residents and business owners.

The groups had the most difficulty with developing a concept that they felt was unique; most anchored their ideas in the natural environment and opportunities afforded by it. Some of their ideas are captured below.

UNPLUG

We've got a lot of nothing! Go to the city if you want to plug in. Come here if you want to unplug!

GROUND YOURSELF

Up here, there's a feeling; it's hard to describe but it grabs you. The 'it' factor. Earth, wind, water – back to the essential elements: calm your mind. Find yourself here.

WEEKEND ALL WEEK LONG

- a less competitive, less stressful, slower paced lifestyle
 - less time spent commuting translates to more family time
 - enjoy living with nature – the beauty and the access to recreational activities
- It can be the weekend all week long. You're home from work in time to go out and do something, and the opportunities are steps from your door. You don't have to wait until Saturday to have an adventure.*

BRAINSTORMING THE NEW BRUCE BRAND ... IDEAS continued

HAVE A REAL LIFE IN NATURE'S RETREAT

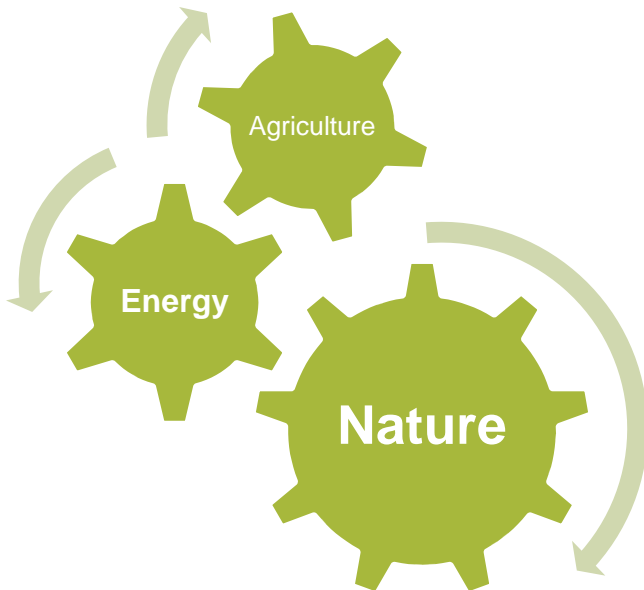
- living in a real world rather than an artificial one ... a world that is true and authentic, with meaningful values: a place where family, community and nature are important, where you know and help one another
 - be surrounded by a spectacular natural environment ranging from beaches to farmland to the rugged Peninsula – not by the artificial built environment of a city
- Ask people who live in the city, 'Are you really living life?' You're in the traffic at 6:30; we are home with our families.*

DIVERSITY: COUNTRY LIVING PLUS

- living in the Country with all of those advantages ... but not in a uniform rural environment with limited opportunities – rather, in a place with huge diversity: diversity of landscapes, diversity of cultures, and diversity of activities and opportunities
- You don't have to give up everything to come and live in the country. We have the benefits of Country living, but parts of the County also have a thriving arts community, and you can do a surprising amount of your shopping locally.*

BRAINSTORMING THE NEW BRUCE BRAND ... IDEAS continued

ENVIRONMENTALLY FORWARD: LEADER IN CLIMATE CHANGE



We are inspired by where we live to do better, to value and preserve what is around us.

- living with nature inspires environmental stewardship, and lends credibility to leadership in green initiatives
- an area with trees, clean air and an abundance of clean water
- World Biosphere Reserve and National and Provincial Parks demonstrate protection of the natural environment and provide educational opportunities
- range of progressive energy sources: Bruce Power, wind and solar installations
- local food from farmgate
- progressive environmentally oriented agricultural projects
- Dark Skies initiative
- local environmental groups

APPENDICES

Part 1: Review of Existing Reports and Studies

List of Resources Utilized

Part 2: Quantitative Survey of Ontario Residents

Questionnaire



Bruce final q'airre

Profile of Respondents

Weighting of the Data

Verbatim Responses to Open Ended Questions



Verbatims Bruce
Survey

Part 1: Review of Existing Report and Studies insights

List Of Resources Utilized In Part 1

- Longwoods Visitor Analysis 2012
- Spruce the Bruce Community Tool Kits
- Bruce County Premier-Ranked Tourist Destination
- RTO7 - Tourism Data Aggregation & Analysis Pilot Project
- Library web analytics
- Google analytics – reports submitted via FTP for download
- Target Market analysis for Walkerton and Warton prepared by OMAFRA.
- Data Aggregation Report 2015

Part 2: Quantitative Survey of Ontario Residents



Profile of Respondents

Number of People in Home	
One	10%
Two	26%
Three-four	49%
Five +	15%
Total	100%
Average	3.2

Household Composition	
A couple with no children at home	31%
A couple with children at home	49%
A single parent with children at home	6%
Other	14%
Total	100%

Incidence of Children in the Home	
<5 years of age	16%
6-8 years	12%
9-12 years	16%
13-17 years	19%
Under 18	55%

Employment Status	
Employed Full-time	67%
Employed Part-time	9%
Total employed	76%
Currently unemployed, unable to work or looking for work	7%
Student	2%
Homemaker	3%
Retired	7%
Other	5%
Total	100%

Education	
High school or less	20%
Some college or university	16%
University undergraduate degree	42%
University post-graduate degree	22%
Total	100%

Household Pre-Tax Income for 2015	
Under \$25,000	10%
\$25-49,999	16%
\$50-74,999	19%
\$75-99,999	19%
\$100,000 or more	37%
Total	100%

See next slide for age, gender and region

Part 2: Quantitative Survey of Ontario Residents



Weighting of the Data

	Sample (unweighted)		Ontario Population*	Sample (weighted)
	#	%	%	%
Gender				
Male	249	48%	50%	50%
Female	256	52%	50%	50%
Total	505	100%	100%	100%
Age				
25 – 34	66	13%	22%	22%
35 – 54	271	54%	54%	54%
55 – 64	168	33%	24%	24%
Total	505	100%	100%	100%
Region				
Bruce County	77	15%	1%	1%
GTA	176	35%	45%	45%
SW ON	101	20%	27%	27%
Near North	51	10%	6%	6%
Eastern ON	100	20%	21%	21%
Total	505	100%	100%	100%

* Source: 2011 Census Profiles – Stats Can