

Huronia Area Tourism Action Plan



February 2014

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Preamble

The Huronia Economic Alliance and the Municipal Councils of Midland, Penetanguishene, Tay and Tiny have placed a priority on enhancing and supporting the further development of their collective Tourism Industry. Leadership, communication, coordination and collaboration are the key actions that will serve to prepare the local Tourism Industry for the future. Strong partnerships will be required to meet and overcome the diverse challenges being faced by this important segment of the area economy.

The Huronia Area Tourism Study is the starting point that will provide the foundation required to build on the guiding principles, the strategic approach and the coordination strategy. This is the municipalities' opportunity to strengthen and enhance the Tourism Industry by building on the existing foundation and moving forward with the implementation plan as outlined.



Executive Summary

The Assignment

Tourism has been identified as one of the four pillars by the Huronia Economic Alliance. The overall objective of this assignment was to assist the Towns of Midland and Penetanguishene, and the Townships of Tay and Tiny to implement a more efficient and effective model for destination planning and management, and in turn move the tourism industry to new levels of success. More specifically the strategy was to address the following:

- More efficient and effective model for destination planning and management.
- Tourism strategy that is industry driven and supported.
- Opportunities for better coordination between local and regional partners.
- Identify opportunities to refresh/enhance or create new experiences.

The Future Tourism Opportunity

If a concerted effort is not taken in Huronia to move towards a more collaborative model between the four municipalities and all key stakeholders a significant economic opportunity will be missed. The implications for the tourism industry with a continuation of the status quo could include the following:

- The tourism sector will continue to lack leadership;
- Marketing will continue to be fragmented resulting in a relatively small voice in the marketplace;
- Tourism will continue to be highly seasonal;
- The region will lack destination image and appeal;
- There will continue to be significant economic leakage out of the region;
- It will be difficult to attract tourism investment as one of the prerequisites for investors will be strong and effective destination management and marketing;
- The tourism visitation potential for the region will not be realized;
- The region will miss out on opportunities to leverage off RTO 7 and Tourism Simcoe County product development and marketing initiatives.

On the positive side, attracting more visitors to Huronia will result in new spending on tourism services and facilities, boosting the local economy and tax revenues. As an example, during its first year of operation (2014), the Keewatin attraction welcomed approximately 30,000 visitors who spent \$350,000 to tour the ship.

According to the Ontario Ministry of Tourism, Culture and Sport Tourism Regional Economic Impact Model (TREIM), every 1,000 visitors attracted to Huronia for an overnight visit can be expected to contribute to the Huronia area economy as follows:

- Approximately \$82,100 in total spending;
- Approximately \$47,600 in gross domestic product;
- Approximately \$31,400 in labour income, supporting 1 job; and,
- Approximately \$23,800 in tax revenues shared among all three levels of government.

While every 1,000 visitors attracted to Huronia for a same day visit can be expected to contribute to the Huronia area economy as follows:

- Approximately \$67,700 in total spending;
- Approximately \$33,600 in gross domestic product;
- Approximately \$21,200 in labour income, supporting 1 job; and,
- Approximately \$17,700 in tax revenues shared among all three levels of government.

Hurononia Tourism Opportunities

Based on the analysis of the existing tourism product throughout the region, the natural and cultural heritage resources, and the industry consultation input the following is a list of key future tourism development opportunities in the area. There is significant opportunity to expand the tourism seasons into the fall, winter and spring months.

Future Tourism Opportunities for Huronia
Aboriginal tourism product/experiences – telling the Aboriginal stories their own way
Waterfront lodging and dining
Fully connected regional multi-use trail system with loops
Further agritourism development
Expanded character accommodation options (B&B's, farm stays)
Historic villages as shopping destinations
Enhanced/expanded packaging of existing products into experiences
Designated touring routes with supporting infrastructure (motorcycle, bicycle, RV/car, pilgrimage)
Water connection to Georgian Bay Islands National Park
Ecotourism, responsible tourism
Creative interpretation of the wealth of local stories
Regional culinary tourism growth
Source: <i>The Tourism Company, 2014</i>

Guiding Principles for the Huronia Tourism Action Plan

The following guiding principles will be considered in all regional tourism initiatives.

Collaboration – facilitate and enable full collaboration among all Huronia Area tourism stakeholders in the private, public, non-government organization (NGO) and not-for-profit sectors.

Soft boundaries -- expand the boundaries of the Huronia Area beyond the core communities of Midland, Penetanguishene, Township of Tay, and Township of Tiny, to offer visitor experiences that encompass complementary and strategically important venues, facilities and services located in adjacent areas.

Geotourism -- develop, support and promote visitor experiences based on the concept of geotourism - tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents.

Yield over numbers – first pursue opportunities to increase the amount visitors spend in the Huronia Area, then opportunities to attract more visitors.

Accountability -- measuring, reporting and modifying products and visitor experience to achieve economic benefits.

Social benefits -- integrate tourism industry activities into the social fabric of the Huronia Area, engaging community members of all cultures and ages.

Environmental benefits -- safeguard the Huronia Area's natural heritage through visitor experiences that do no harm, and where possible, and contribute to the rejuvenation of damaged resources.

Avoid duplication - work with existing initiatives and organizations and build on their efforts.

Implementation Plan

The main objective in the immediate term will be to set up an expanded Huronia Area Tourism Steering Committee to begin coordinated destination development and management throughout the area. The four municipalities are taking the initial step as the catalysts to initiate implementation of the strategy, but the intent will be to engage the private sector to take on a joint leadership role going forward. By doing this, the four municipalities are establishing the collaborative culture needed to succeed across four political and social boundaries.

In the longer term, beyond 2017, subject to the necessary resources, the intent will be to develop a more formal structure with a joint private/public sector governed Tourism Office to assist in implementing the annual project priorities.

The following table summarizes the key steps through September 2014 to initiate implementation of the Strategy.

Implementation Plan	
Target Date	Required Action
March/April 2014	The four area Municipal Councils are presented the final report and accept the report direct/authorise the existing Steering Committee to implement the Action Plan as detailed for 2015 - 2017
May 2014	The current Steering Committee to recruit representatives from the area tourism industry and other stakeholders for their assistance and expertise with the Tourism Action Plan
June – September 2014	Steering Committee to: <ul style="list-style-type: none"> • Develop a Business Plan to implement the Tourism Action Plan 2015 – 2017 • Research funding sources for the Tourism Action Plan 2015 – 2017 • Consider various methods and resources that will provide for the human resources required to implement the Tourism Action Plan 2015 – 2017 • Provide a report to the four Councils as an update on the above noted actions
<i>Source: The Tourism Company, 2014</i>	

Conclusion

The final Huronia Area TOURISM ACTION PLAN provides the four municipalities with the concrete framework to collectively implement a more efficient and effective model for destination planning and management, and in turn move the tourism industry to new levels of success.

The plan focuses on a coordinated approach to a tourism destination management plan and identifies opportunities for strategic development between regional and local partner organizations involved in tourism for the next three years. It encourages a refresh and enhancement to current tourism products and services to develop key and unique visitor experiences and projects a positive and bright road ahead for tourism in Huronia.

Together, with the Economic Strategy Action Plan, the TOURISM ACTION PLAN has the potential for:

- Enhanced inter-municipal cooperation to support and foster regional tourism;
- Pooling of resources including leveraging funding opportunities through the RT07, Provincial and Federal Governments;

- Forming community partnerships with local government, industry professionals and organizations such as Georgian College (resources and potential internship), Tourism Simcoe and regional Destination Marketing organizations.



1. **Background**

1.1 **Assignment Objectives**

Tourism has been identified as one of the four pillars by the Huronia Economic Alliance.

The overall objective of this assignment was to assist the Towns of Midland and Penetanguishene, and the Townships of Tay and Tiny to implement a more efficient and effective model for destination planning and management, and in turn move the tourism industry to new levels of success. As outlined in the terms of reference the more specific objectives were identified as follows:

- Focus on tourism destination planning and management, not marketing;
- Ensure the development of a tourism strategy that is industry driven and supported;
- Identify opportunities for better coordination between local and regional partners;
- Identify opportunities to refresh/enhance current tourism products and experiences and develop unique new experiences;
- Prepare a regional tourism action plan focussing on experience and business development, investment readiness, enhanced visitor services, market development, and collaboration between stakeholders, all with accountability measurements built in.

1.2 **Approach and Methodology**

The consulting teams approach for this assignment encompassed 5 steps or work phases, covering the 4 phases outlined in the original terms of reference:

- **Background information gathering and analysis** – to ensure all team members were up to speed before beginning the real work.
- **Supply and demand assessment** – to evaluate the current situation, and gaps and opportunities.
- **Evaluation of needs, opportunities and strategic alternatives** – the product market match and benchmarking.
- **Draft strategic tourism plan** – to present back to the industry and the public for feedback.
- **Implementation strategy** – the blueprint for implementing the action plan.

Throughout these work phases the consultants completed extensive industry and stakeholder consultation including meetings and workshops with the Steering Committee, the tourism business community, and other key stakeholders and partners.

OBJECTIVES

- Focus on destination planning & management, not marketing
- Ensure industry driven
- Identify opportunities to better coordinate
- Identify opportunities to refresh & develop new experiences

INDUSTRY CONSULTATION

- Individual interviews
- Round tables/workshops
- Industry visioning session
- Online survey
- Public meeting
- Tourism Summit - February

The consultation process was an integral part of this assignment, to ensure the strategy was developed from the industry's perspective. More specifically the consultation program included the following:

- Scheduled meetings, workshops with, and regular reports to, the Steering Committee;
- Solicitation of briefs and submissions;
- Key stakeholder depth interviews (20 +);
- Round table meetings and workshops;
- Visioning session;
- Online survey (11 respondents);
- Public meeting and open house.

The culmination of this extensive consultation process will be a presentation by the consulting team at the Huronia Tourism Summit being planned for February 2014.



2. ***Huron Area Tourism Situation***

2.1 The Regional Context

In 2001 the Ministry of Tourism, Culture and Sport, Tourism Investment Development Office, recognized the southern Georgian Bay region (area between Owen Sound and Waubesa) as a distinct destination area and used it as a test case for assessing the Premier Ranked Destination framework's utility in planning Ontario destination regions. The consultants retained by the Ministry defined three natural destination areas within the larger region – Collingwood /Blue Mountains/Thornbury, Wasaga Beach and Midland/Penetanguishene. They determined that the broader region 'has four key strengths that sustain its current attractiveness, and position the whole of the region for substantial growth in visitation':

- The quality of its resource base and the opportunities it provides for outdoor recreational pursuits;
- The quality of its cultural heritage resource base;
- The fit between these attributes and the current and emerging wants held by tourists; and;
- The region's proximity to the large and growing population base in southern Ontario and across the borders at Niagara, Windsor and Sarnia'.

All of these attributes still hold true.

In 2009 the Sorbara Report concluded that a re-alignment of the tourism regions was necessary. The Sorbara Report recommended the establishment of new Destination Marketing and Management Organizations (DMMO's) within each of the reorganized 11 regions (eventually expanded to 13 regions throughout Ontario). It was decided that a new region covering Bruce, Grey and Simcoe Counties would be the optimum approach for southern Georgian Bay, expanding the old region by incorporating the Bruce Peninsula. This new expanded tourism region was given the name Regional Tourism Organization (RTO) 7. The following were identified as the primary roles for the new DMMO in RTO7:

- Oversee the development of new products;
- Identify and define unique experiences offered by the region;
- Market the region to potential visitors;
- Engage the government on critical issues;
- Significantly increase tourism revenues.

The strategic research and planning work completed in setting up RTO 7 recognized that the setting of the region on the shores of Lake Huron and Georgian Bay alongside the multiple rivers and lakes would be the

primary tourism draws, offering potential to attract the readily accessible market in the GTA and SW Ontario. A common historical thread throughout the region was that it developed not so much as a tourism destination but rather as a home away from home, as evidenced by the large seasonal cottager population. Beginning with the development of Blue Mountain village and resort the area began to evolve as more of a conventional, modern tourism destination, rather than a seasonal cottaging destination. The strategic planning work for RTO 7 recognized the three counties together may not currently have a clear sense of regional identity, but it was concluded that the region could be positioned in the marketplace as a coherent region with its own name and identity. The recommended positioning statement for RTO 7 is below:

BruceGreySimcoe is a four season product, offering a range of experiences of natural scenery and outdoor activities from just lying on a beach or swimming or just getting outdoors all the way to vigorous sports. It has, besides, historic towns. The experiences offered range from campgrounds to luxury resorts. The emotional appeal ranges from a warm welcome (and even luxury) through a sense of renewal all the way to breathtaking vistas. The benefits to visitors include rest and recreation, healthy fun, and reconnection (with self, family, romance, and nature).

Over time there are a number of distinct destination areas that have evolved within the broader three county region that is now referred to as RTO 7. The Tiny Tay Peninsula is one of those destination areas, as are Wasaga Beach and Collingwood and the Blue Mountains. The Tiny Tay Peninsula has a broad range of core attractions, supporting attractions, accommodation, and other tourism services, but a lack of coordination and collaboration and some strategic gaps in supporting infrastructure within the region has limited the development of the area. This region has lagged behind other areas like Collingwood and the Blue Mountains, but certainly offers significant potential to grow as a year-round destination.

It is useful to look at the catalysts that moved Collingwood and the Blue Mountains beyond a seasonal cottage destination area to more of a year-round tourism destination.

2.1.1 Blue Mountains Case Study

Jozo Weider founded the Blue Mountain Ski Area in 1941. In the early days skiers came to Blue Mountain on the train arriving at the Craighleith Train Station and then being transported by horse drawn carriage or car to the slopes at Blue. Over the years the facilities expanded and a number of private ski clubs were started along the escarpment adjacent to Blue Mountain. Today there are five private ski clubs extending along this section of the escarpment with in excess of 5,000 members, many owning weekend residences in chalet subdivisions on club lands and in the surrounding areas. Prior to the 1980's few of the club members used their properties in the non-ski season. It is a different story today.

Up until the 1980's the Collingwood and Blue Mountain tourism industry was highly seasonal with a strong winter season and relatively low visitation in the summer months and little in the spring and fall – essentially

the opposite of the Tiny Tay Peninsula tourism industry today. The transition to a year-round destination evolved over a number of years with several significant development steps. The first small diversification into the summer season took place when Blue Mountain built the Great Alpine Slide Ride in 1977. The first serious step into year round diversification came in the late 1980's when the Resort added the Monterra Golf Course, the first resort hotel and conference centre and a condominium development. Then in 1999 the family-owned resort announced a partnership with Intrawest Corporation, which led to the development of the slope side village and a second gold course – the Raven at Lora Bay (which was eventually sold). Blue Mountain was established as a destination resort, which then became a catalyst for the development of Collingwood and the Blue Mountains as a year-round destination.

As the management and marketing staff at Blue Mountain recognised over time, the regions appeal as a destination was more than just one of the component parts even if one of those parts was a destination resort like Blue Mountain. It is also comprised of an increasing diversity of golf courses (from low end to championship signature courses), numerous small quaint villages like Creemore, Thornbury and Flesherton, and other attractions, local foods, special events and festivals, biking trails, cross country ski trails and commercial areas, public and private alpine ski areas, marinas, two small airports (Collingwood Airport and Edenvale Aerodrome) and a range of accommodation (from B&B's to resort hotels) and a wide range of restaurants. The true appeal of the area lies in the critical mass and diversity of attractions and experiences.

Today Blue Mountain Resort receives as many guests through the summer months as in the winter, and future growth is expected to see summer markets exceeding the winter business.

2.1.2 Wasaga Beach Case Study

Wasaga Beach still suffers from a highly seasonal tourism industry. In 2006 A Tourism Strategy was prepared for Wasaga Beach (by the same authors). Market research completed as part of the background work determined the major markets being attracted to the beach were from the GTA followed by York and Peel Regions. Quebec was also identified as a growing market representing 10% of overall visitors at that time and 20% of overnight visitors. At the time the strategy was being prepared a developer was planning a large-scale year round tourism development in the main beach area. If it went ahead this development may have been a catalyst like Blue Mountain village and resort to significantly expand the tourism season. Unfortunately the economic climate took a turn for the worse and the development was never realized. The Town is still working towards becoming a multi-season tourism destination. The vision statement developed by the Wasaga Beach tourism stakeholders in 2006 still holds true as the future vision:

Wasaga Beach is an international, multi-season resort destination stretching along the world's longest freshwater beach and dune ecosystem, situated on the pristine shores of spectacular Georgian Bay with the beautiful Blue Mountains as a backdrop. The community and surrounding

area offers a wide range of unique visitor experiences for all ages to enjoy including opportunities to explore the area's rich natural and cultural heritage.

Adjacent Destinations

Wasaga Beach – close to 1 million overnight visitors & 1 million day trippers

Collingwood/Blue Mountains – 1.4 million visitors split between summer & winter

Horseshoe Valley Resort – 115,000 skier visits, 35,000 golf rounds

Casino Rama – 3 million visitors

Given that Wasaga Beach is part of the world's longest freshwater beach which extends up the west side of the Tiny Tay Peninsula, and given the nature of its tourism sector, there are important potential synergies with Huronia. It is also useful to note that Wasaga Beach attracts a significant number of overnight visitors who stay over in Collingwood and the Blue Mountains, but a very small proportion of visitors staying in the Midland/Penetanguishene area, suggesting there may be opportunity to work together for mutual benefit.

Are there opportunities for Huronia to capitalize on visitation to adjacent regions? It would certainly seem there is potential to attract visitors from Wasaga Beach given the proximity and the availability of all-weather attractions in Huronia, a strategic gap in Wasaga Beach. There may be potential to develop synergies with other adjacent established destinations. There is substantial tourism visitation to areas lying east, west and south of the Peninsula as follows:

- Wasaga Beach (40 minutes west of Midland) – approximately 960,000 overnight visitors mainly in summer (over 1 million day trippers).
- Collingwood/Blue Mountains (1 hour 20 minutes west of Midland) – approximately 1.4 million visitors split between winter & summer.
- Horseshoe Valley Resort (45 minutes south of Midland) – approximately 20,000 room nights, 115,000 skier visits, and 35,000 golf rounds.
- Casino Rama (60 minutes east of Midland) – approximately 3 million visitors, 100,000 room nights at the hotel. Casino Rama is a major draw for casino and event markets but with little spill over, so there may be less potential here.

There are also a number of other significant tourism draws adjacent to the Peninsula.

2.1.3 Beausoleil First Nation and a World Biosphere Reserve

On the north end of the Peninsula are the islands occupied by the Beausoleil First Nation (BFN), an Anishinaabek community occupying the three islands of Christian, Hope and Beckwith. They currently have over 230 cottage lease lots on Christian Island and they have plans for adaptive re-use of the Hope Island Lighthouse as a small-scale tourism initiative, and they have entertained plans for developing an ecolodge on Hope Island. All three islands currently serve as important destinations for boaters out of the marinas in Midland and Penetanguishene. Any future tourism development in the BFN territory would have a natural connection to Huronia given the route to the islands is through Huronia.

Due north of the Peninsula lies the 30,000 Islands shoreline of Georgian Bay. In 2004 UNESCO designated this archipelago a World Biosphere Reserve, the 15th in Canada. The reserve, which covers the 30,000 islands

extending up the east shores of Georgian Bay, has been designated to recognize the internationally significant ecosystem combining conservation of biodiversity with sustainable development. It includes the Georgian Bay Islands National Park and several Provincial Parks as well as numerous conservation areas. These islands and waterways serve as the major attraction for boaters, with the Peninsula being home base for many of them. Once again there is a natural connection from Huronia to the 30,000 islands, but more needs to be done to facilitate the physical connections for visitors.

In conclusion there are already synergies between Huronia and the BFN islands and the Georgian Bay Biosphere reserve, as well as significant further potential. There are no doubt opportunities for Huronia to capitalize on the significant visitation to the other noted destinations, particularly Wasaga Beach and Horseshoe Valley due to proximity, and perhaps even with Collingwood and the Blue Mountains.

2.2 The Strengths and Weaknesses of Huronia as a Destination

Based on our collective past experience in destination area planning there are a number of critical success factors that need to be considered in establishing Huronia as a multi-season tourism destination. A truly competitive destination should be strong in all the following areas (not necessarily in order of priority).

2.2.1 The Motivating Attraction or Draw

There has to be an overriding compelling reason to visit any destination. This could be the landscape, the waterscape, the region's historical significance or a single major attraction like Disney World to Orlando.

Hurononia has Georgian Bay.

2.2.2 Quality of Attractions

Successful destinations have a mix of attractions with the following attributes:

- Unique and/or original/authentic (curiosity is a strong tourism motivator);
- Critical mass;
- Year round or multi-season and inclement weather appeal;
- Ability to appeal to a broad range of markets with some compelling reasons for more distant markets;
- Attractions that can grow and/or evolve to maintain their appeal; and
- Aligned with the desired image of the destination or community.

Hurononia has a strong critical mass of unique and compelling attractions that are open through multi-seasons and provide inclement weather options.

2.2.3 Quality of Supporting Infrastructure and Complementary Products

The support infrastructure includes accommodation, shopping, food, business travel facilities, visitor information services, sports venues, and event spaces. The primary products or attractions may provide the overriding reason to visit a destination, but the complementary products can be equally important in creating a desirable image for the destination, and influencing level of satisfaction with a visit.

Hurononia has most of the bases covered here but there are some gaps and weaknesses.

2.2.4 The Need to Differentiate

Sustainable growth can best be achieved by focussing on attributes that cannot easily be duplicated in other destinations, while preserving the environmental/locational elements that already are the major draw.

Hurononia's attractions are unique and authentic focussing on the rich history of the area and the cultural diversity, combined with the unique natural attributes in being a peninsula extending out into Georgian Bay.

2.2.5 Accessibility of the Destination

Access to markets is critical. External accessibility refers to different access modes, ease of access, cost of access, quality of reception facilities, intermodality (the ability to transfer from one travel mode to another), and the variety of travel modes.

Hurononia is close to a very large market in the GTA and there are alternative routes to reach the area. The addition of alternative transportation programs like the ParkBus can serve to enhance this accessibility.

2.2.6 Internal accessibility

Internal accessibility refers to the public transport systems, multi-use trail systems, taxi services, road quality and congestion, parking facilities and cost, connections with external access nodes, handicap accessibility, the degree of spatial concentration of attractions and complementary products, and the overall safety, cleanliness and aesthetic appeal of a community.

There are some weaknesses and deficiencies in the internal transport.

2.2.7 Image

Travellers develop opinions about destinations that can play a significant role in their destination selection process. A positive tourism image can have a constructive impact on the image of the destination in general, and can enhance the community's reputation as a business venue and a desirable place to live.

There are no recognized negative image issues for the region, and the rich history and natural diversity of the area provide for strong positive image associations.

2.2.8 *The Importance of Local Market Support*

The local attitude towards tourism must be supportive. Local residents are the best ambassadors for any successful destination.

There is reportedly some weakness in local support for tourism.

2.2.9 *Enabling of Private Sector Investment*

The public sector role in a successful destination should be to invest in setting the stage in order to stimulate private sector investment.

The municipalities will need to become more sophisticated, coordinated and proactive in pursuing tourism investment attraction to fill some of the tourism infrastructure weaknesses/gaps.

2.2.10 *Strong Accountable Marketing Support*

There is a direct relationship between marketing expenditures and visitation levels. Perhaps the most important impact of competitive destination marketing is the ability to target and attract desired market segments.

Hurononia lacks a strong, focussed and coordinated marketing approach and this will need to be addressed in the future. There are a number of sophisticated tourism marketers active in the region including for example Huronia Historic Parks, Parks Canada, Parkbridge Marinas, and Ontario Parks.

2.2.11 *Definition of the Destination from the Visitor's Perspective*

This is a very important success factor and one that is often overpowered by politics. Tourists do not look at political boundaries when making their vacation or travel plans. They are typically looking for an overall experience that in all likelihood crosses over political boundaries.

Having the four municipalities come together to initiate this strategic planning work is the first step in addressing this requirement.

Hurononia is not yet established as a year-round tourism destination. It is comprised of four municipalities all situated within the physical boundaries of a peninsula extending up into the southern end of Georgian Bay, but without a distinct identity for positioning in the tourism markets. Surrounded by established destinations including Wasaga Beach, the Blue Mountains/Collingwood, Muskoka, and the 30,000 Island archipelago in Georgian Bay, the Huronia area certainly has the potential to become a coherent and identifiable destination. It is an easily definable geographic area, the peninsula, and it already has a strong critical mass of attractions and supporting infrastructure, if not open year round at least through three seasons.

Feedback from the consulting team received during the consultation process assisted in identifying the following key strengths and weaknesses of the region:

Huronia Area Tourism Strengths & Weaknesses	
Huronia Tourism Strengths	Huronia Tourism Weaknesses
Strong cluster of cultural attractions (both natural and cultural heritage) Aboriginal heritage and culture National and provincial parks, which serve as major attractors and help to establish credibility A diversity of all season events and festivals (not yet strategically grown as tourism events) Georgian Bay and the shoreline (beaches) for summer activities A growing culture scene (local theatre supported by quality dining) Growing local dining options Growing agritourism sector Extensive trail system Reasonably good range of roofed accommodation including hotels and B&B's (with some gaps) Strong creative arts sector	Local transportation services Weak customer service attitude Lack of a destination image Lack of coordination and partnership in festivals and events Limited signage for public beach access (in some areas) Insufficient/weak winter attractions Limited capacity and diversity, weak distribution of lodging and food service options
Source: <i>the Tourism Company, 2014</i>	

The following list summarizes some of the key gaps identified by stakeholders through the consultation process.

Huronia Area Tourism Gaps	
Leadership Collaboration Destination marketing and management Destination identity and brand Transportation into Georgian Bay and around the region	Depth and variety of quality character and/or waterfront accommodation Tours and packaging Consistent signage Visitor information services Local awareness of the value of tourism
Source: <i>the Tourism Company, 2014</i>	

2.3 Key Tourism Assets

Market research points to the desire from most pleasure travellers for a combination of both culture and nature experiences when they travel domestically and internationally. According to the Canadian Tourism Commission, Canada as a tourism destination is seen to be weak on the cultural side and perceived to be largely one-dimensional with a focus on the nature. Huronia is a region that has the potential to offer both strong cultural and natural heritage products and experiences.

Based on analysis of the current state of the tourism sector in Huronia, consultation input and knowledge of markets the consultants have identified the following key strategic tourism assets.

Hurononia Area Strategic Tourism Assets

Culture – French, Aboriginal, Jesuit, Métis, English
Heritage – there is a rich cultural heritage throughout the area (native and non-native)
Georgian Bay environment – Prominent cruising grounds, beaches, extensive waterfront, National Geographic recognition
Marine infrastructure – currently with some 4,000 slips that are under capacity
All weather multi-seasonal tourism resources and attractions
Extensive trail system
Hidden gems throughout the region with new creative and authentically local businesses that refresh the destination (examples include new local food restaurants and shops, agritourism ventures, Keewatin etc)
Gateway to World Biosphere Reserve & National Park & National Historic Site
Designated tourism development sites and areas
Historic villages

Source: *the Tourism Company*, 2014

These assets provide opportunity for Huronia to grow and diversify the tourism economy.

2.4 External Influences

Dr. Daniel Scott a Professor in the School of Environment at Waterloo University and Canadian Research Chair in Global Change and Tourism has produced important future forecasts for tourism activities under the influence of climate change and global warming.

- The snowmobile season in Barrie could decline by 44-68% in 2020's and by 56-99% in 2050's.
- National Park visitation could increase by 13-19% in 2020's and 21-47% in 2050's.
- Ontario Parks visitation could increase by 11-27% in 2020's and 15-56% in 2050's.

- Golf season length could increase from 202 days to 218 days in 2020's and 202-229 days in 2050's in Orillia area.

Climate change is beginning to have an influence in the study area and will continue to lead to both positive and negative impacts that need to be considered as part of long term planning. The tourism sector must develop an adaptation plan for climate change (i.e. how to adapt to the shortening and increasingly inconsistent snow and ice season).

Another major threat to tourism activity in the Huronia area is the declining water levels in Georgian Bay. This issue is partly related to the climate change issues but there are also other major contributing factors that are not going to go away any time soon. Declining water levels are caused by numerous factors but the big one is the dredging that has occurred in the St Clair River over the past hundred years and the work to stop sand beach erosion along the shores of Lake Huron. There are plans for engineered solutions to return the natural water levels to Lake Huron and Georgian Bay but they are at best more than 10 years away from being implemented.

According to research conducted by Dr. Daniel Scott declining water levels by 64 cm in Lake Huron and Georgian Bay could result in 24 marina closures and 2,300 slips lost. The reduced water levels and increased water temperatures are also negatively impacting fish spawning areas which could in turn have a negative impact on the sports fishery.

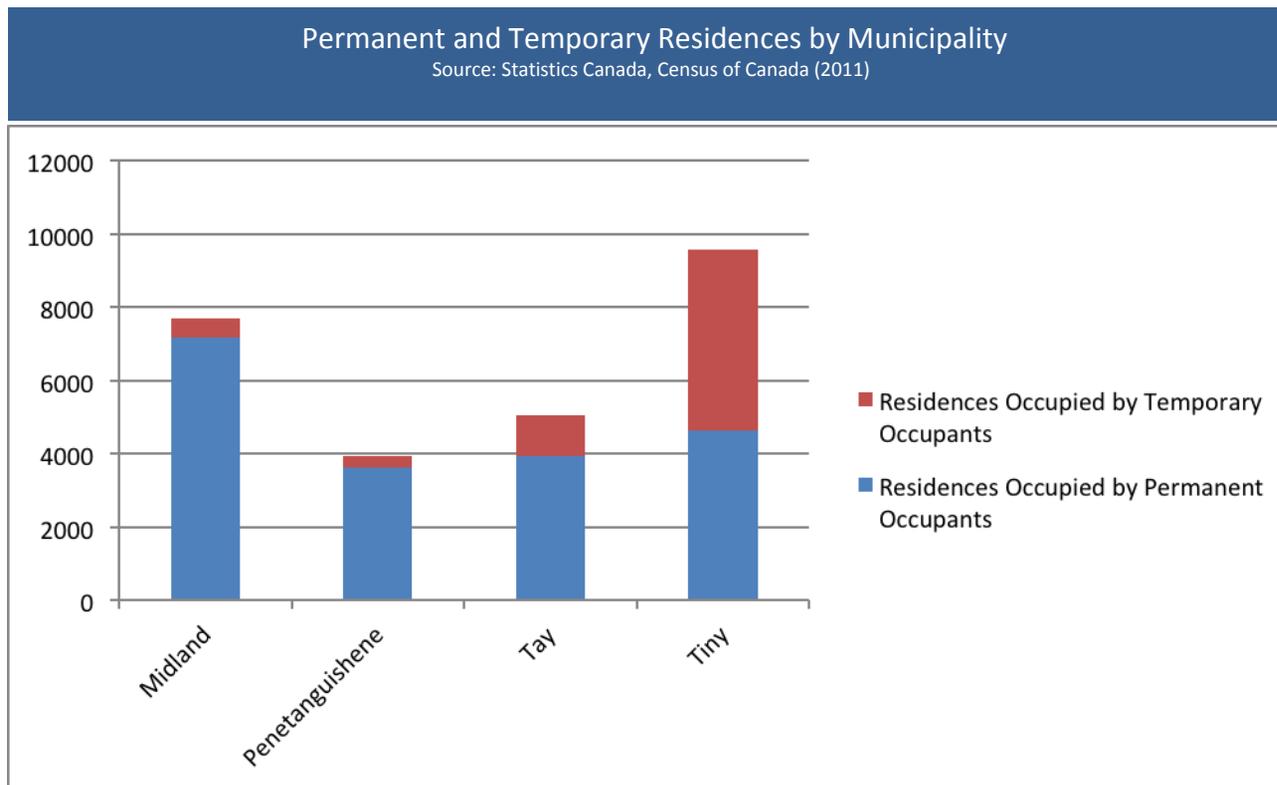
As with climate change the tourism sector must consider water level adaptation plans. The large public outcry last year over the declining water levels in Georgian Bay, intended to attract political attention, actually led to negative publicity that negatively impacted boater interest in Georgian Bay. An important lesson was learned, that the government lobbying for support needs to continue but not in the public media which can have negative impacts in the marketplace. There will continue to be water in the bay sufficient for boating but the industry must begin to consider adaptation plans to cope with the impacts on infrastructure and to restore boater confidence and interest.

Of course there are always potential unpredictable external events that could have a negative impact on tourism – the outbreak of SARS and economic recessions being two examples. No amount of planning can mitigate the impacts of extreme events, but tourism has been proven to be one of the more resilient industries.

2.5 Planning for Tourism Development in the Region

2.5.1 Seasonal Residential

While Tiny Township may house more residences than Midland, Midland is the largest residential centre in the region of Huronia. The Township of Tiny’s population is scattered across a large geographic area in a variety of villages and settlement areas across 344 square kilometres. Midland in comparison spans just 35 square kilometres. Midland functions as the main residential centre in the region and is home to much of its commercial and institutional infrastructure.

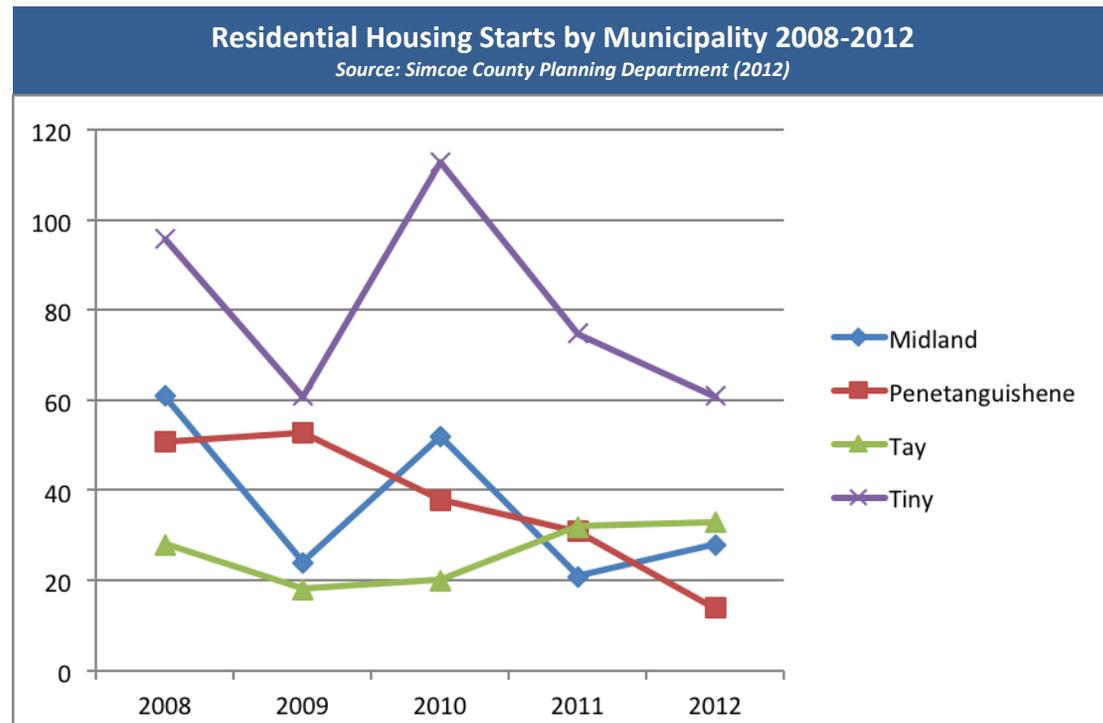


A review of 2011 Census Data indicates that while Midland has approximately half of all private dwellings in Huronia (approximately 16,500 out of 35,000), most (almost 90%) are occupied by permanent residents. Indeed of the estimated 8,300 residences occupied by temporarily residents in Huronia, approximately 20%

(1,900) of these are in Midland. While some of the new developments may be attractive to prospective cottage owners as a seasonal dwelling or rental property, most of the seasonal accommodation is in communities in the region with more direct access to Georgian Bay, in Tiny and Tay specifically.

New build residential development and pending development applications are scattered throughout Huronia. Residential development predominantly takes the form of single detached dwellings, with some townhouse development in more desirable areas typically on the waterfront.

New residential construction in Midland has declined since 2008, most likely a consequence of the global economic slowdown that has continued to negatively impact the town’s manufacturing industries. Approved residential developments in Midland are primarily located along Georgian Bay and the smaller water body of Little Lake. These two areas are identified in the Town’s Official Plan (2013) as key growth areas, particularly as it pertains to the tourism industry. The largest development under construction is the Bay Port Village, which once completed will add 63 single detached homes and 177 townhouses adjacent to the Midland Bay Sailing Club (27 have been built to date). The development will also add 330 condominium units to the area in a later phase. Other developments directly on Georgian Bay are Captains Cove (61 single detached residences – 42 currently constructed) and Mundy’s Harbour (12 townhouses – yet to begin construction).



Given the historic rate of residential construction in Midland (2008-2012 average of 37), these developments are likely to build out over the longer-term. As the Town's Official Plan (2013) has suggested, some of these new residential developments may prove attractive to investors looking to purchase a cottage or seasonal home in the area, particularly given that many have waterfront access and/or views. Examples include Mundy's Harbour, which has access to a private harbour on Georgian Bay.

The largest planned residential development in the area is Skyline's Port McNicoll community in the Township of Tay, which if completed, will likely house a significant number of seasonal dwellings. The proposed development is also slated to add tourist commercial infrastructure in the form of a new hotel and a restaurant in the future, however this plan has yet to be approved by the Municipality. Other, but smaller, residential developments with potential to generate seasonal tourism are the Riverdale subdivision and Wycliffe Georgian Landing, both in Victoria Harbour. The former will add 16 single-family dwellings to the community, and the latter 82 town homes on the waterfront. Given their waterfront locations, both subdivisions are likely to attract a mix of seasonal and permanent residents.

The Township of Tay communities (Port McNicoll, Victoria Harbour, and Waubaushene) are popular cottage destinations. While Skyline's proposed development could add considerably to the local supply of seasonal dwellings over the longer-term, Township of Tay already houses many of Huronia's cottages: Census data from 2011 indicated that the Township contains a little over 1,100 seasonal dwellings, accounting for approximately 15% of the region's cottages. Local planning authorities estimate that the Township of Tay's population swells by approximately 2,700 residents during the summer months from a base of 9,700. Most of these are found along the shores of Georgian Bay outside of the main communities: Much of this shoreline is already built up, limiting new cottage development in this township.

The Township of Tiny is the largest township in Huronia in terms of both area (344 square kilometres) and number of residences (9,564 in 2011). Despite its expanse, settlement in the area is primarily concentrated along the coastline of Georgian Bay. Tiny has a total of 70km of uninterrupted coastline, and some of the most desirable beaches in Huronia Region. Most of the housing in the Township runs along the shoreline, complemented by several small inland communities. Much of the housing along the shoreline is used as seasonal cottages: Estimates from local planning authorities indicate that the population in the Township grows by approximately 12,000 residents every summer, effectively doubling the local population. Estimates from Statistics Canada's (2011) Census indicate that over half (52%) of all residences in the township are used as seasonal dwellings.

Much of the shoreline is already developed, meaning that new development applications are primarily on the urban fringe, approximately 500m-1km out from the coast. The Township's Official Plan has attempted to limit new development along the shoreline, instead encouraging new tourism development further inland in Tiny's settlement areas and agricultural communities.

Despite the distance of remaining vacant land to the beach, there is still demand for both permanent and seasonal dwellings in Tiny: there are currently 6 subdivisions with draft plan approval in the Township, which will potentially add an additional 116 lots in the shoreline community. The Township also has several residential developments with draft plan approval in and around inland settlement areas, which will contribute an additional 25 lots. Historic annual housing starts indicate that the rate of new residential construction in Tiny is more than twice that of other Huronia communities: Between 2008 and 2012, the Township averaged 81 residential housing starts annually. This is most likely due to the ongoing attraction of Tiny as both a cottage and retirement destination, and the current supply of vacant lots.

Discussion with Township staff indicated that the Township is currently at capacity in terms of its ability to accommodate tourists: Limited public beach access and parking mean that the area is not ideally set up to accommodate visitors. In this context, while the Township welcomes new residential development, it does not necessarily encourage the development of more tourism-based residential and commercial development.

Penetanguishene's housing market remains sluggish: New residential development in the town has been slow to recover since the 2008 financial crisis. The only subdivision currently under construction in the town – The Village at Bay Moorings – has potential to attract seasonal dwellers as it is located adjacent to a marina.

Four large residential subdivisions have received draft approval, all concentrated in the south end of Penetanguishene away from the waterfront. These proposals have the potential to add an additional 529 new housing units to the town, however all are pending vis-à-vis the town's water and sewage capacity. Given that most of the residential development occurring in Penetanguishene is geared towards seniors, it is this demographic that comprise the majority of new residents to the town. Anecdotal discussions with Town staff suggested that most of these retirees choose to settle permanently in the town rather than use their house seasonally.

A review of Census Data (2011) indicates that the town has a relatively small number of seasonal dwellings in relation to other Huronia communities – a little over 300 cottages, which accounts for around 3% of the area's seasonal dwellings. Local planning authorities estimate that the town's seasonal population in 2013 was approximately 400 residents. This is a relatively small figure given that the town boasts a permanent population of just over 9,100. Despite this, there is an opportunity for local tourism businesses to target visiting friends and relatives associated with new seniors' residences in the town, and for the town to function as a broader tourist attraction and historic commercial strip in the Huronia Region.

2.5.2 Destination Development

As noted above Skyline Investments, a firm involved in the development of destination communities, hotels and resorts, is planning a large residential and tourist destination development in Port McNicoll. The planned community has a nautical theme – with Skyline bringing the S.S. Keewatin to the port as a permanent landmark and attraction. This is in keeping with an identified priority of the Township’s Official Plan that encourages the inclusion of heritage elements within new development. Despite this, much of the work required to transform the ship and the adjacent park into a tourist attraction has yet to be completed: The Township’s ultimate goal for the ship is to work with the developer to include it within a new historically-themed public park along the waterfront that opens up access to the waterfront for new and existing residents and potential tourists. The SS Keewatin is now operated by a not-for-profit ‘Friends Of’ organization.

Phase 1 of the Skyline development comprises 60 residential lots which will house single family dwellings – all of which are now sold. During this phase, Skyline sold lots to property owners however they will enforce strict design guidelines to ensure uniformity in style. Discussion with town staff indicated that the development is likely to attract a mix of permanent residents (primarily retirees) and seasonal cottagers. Given that the Township has averaged an annual rate of construction for new residential houses of 26 per year between 2008 and 2012, it is likely that the build-out of this phase will occur over several years.

Phase 2 of the Skyline development proposes additional residential development, but there has been discussion about adding some tourist commercial infrastructure including a hotel and restaurant. The development has the potential to create a significant tourist attraction in Huronia, particularly if a future development phase includes the hotel and restaurant.

2.5.3 Commercial Development

Over the past five years, commercial development in Huronia has primarily taken place in the Town of Midland: Midland functions as the region’s commercial centre. New commercial development in Huronia is currently limited to proposals in Midland and Tay. The Town of Midland is in the process of reviewing the site plan application for a big-box style development with approximately 96,000 sq. ft. of retail space. The proposed location is along Highway 12 just south of the downtown core. Discussion with Town staff indicates that this development will likely appeal to both permanent and seasonal residents of the area, particularly given its strategic location along Highway 12 linking many of Huronia’s main settlement areas. Existing commercial development in Midland is split between the historic downtown stores along King Street, and big box commercial development along Highway 93 (Penetanguishene Road).

Midland boasts a significant historic downtown with tourist appeal. The main commercial district runs along King Street north of Yonge Street down to the bay. The strip contains a variety of businesses that encourage tourism including boutiques, antiques, cafes and bars. While the Town does not have a Community Improvement Plan in place, it has a strong Business Improvement Area that covers about a third of the downtown, and represents approximately 150 businesses. The BIA has made significant strides in improving the aesthetic appeal of the downtown strip. The BIA offers a façade grant program that aims to encourage local businesses to renovate their facades with historic design features: This is a recently introduced program that has yet to receive any applications. Other Municipal initiatives include street beautification including planters (see exhibit below) and painted lampposts. The town also participates in Ontario's Communities in Bloom program, with its Parks and Recreation Department operating a Flowerbed Dedication Program to help subsidize the cost of maintaining attractive planting in the downtown core and surrounding parks.

Midland's commercial district slopes down to Georgian Bay offering scenic views of the water. The town dock offers access to the water for boaters and through commercial tour operators, and a nautical-themed restaurant. Special events like the Tall Ships provide a historic and cultural experience. While the downtown commercial district functions well as a tourist attraction – providing commercial, cultural and historic experiences in a scenic environment – access to Georgian Bay remains relatively limited. In this regard, Midland is no different from many other communities along Georgian Bay including Honey Harbour and Collingwood.

In an effort to expand pedestrian access to Georgian Bay, the Town of Midland has recently purchased 36 acres of former industrial waterfront land, including 33,000 feet of shoreline, with plans to facilitate a mix of new commercial and residential development on the land. This was identified as a priority within the Town's Official Plan. The process is expected to be long-term, with rezoning and environmental assessments required before any development proposals can be courted, however the acquisition has the potential to extend Midland's tourist district significantly along the waterfront. This development has the potential to dramatically increase the tourism potential of Midland's downtown. Outside of the immediate downtown area is the community of Little Lake. The area surrounding the lake is becoming increasingly subject to new residential development, however the lake itself, and the park to its northeast side is a site of historic significance. Settlement in the area pre-dates European contact, and much of the native history and settlement of this area is showcased in the Huronia Museum and Huron Ouendat Village in the park. The park also boasts a more recent history, having been converted into a driving park after the Second World War and becoming a popular tourist attraction until the 1980s. The park has now been converted into a municipal park with associated amenities including play structures and a beach volleyball court, however its historic significance remains. The park is a valuable community resources for the people of Midland, however there is potential for the Town to emphasize the historic nature of the park within any tourism

strategy. The local history could be showcased through a variety of story-telling devices and approaches. Moreover, it should be promoted as an integral component of the community's history within tourism resources. To emphasize its cultural and historic significance, the Town of Midland could consider changing its name to the 'Little Lake Historic Park' – ensuring that it is recognized as both a valuable community recreation asset, but also a tourism attraction. Any development of the park into a tourism asset would complement the existing museum located on site, and nearby amenities including a bed and breakfast and campsite.

Existing commercial activity in the Township of Tay is relatively limited, with residents relying on stores and services in Midland. Commercial activity in the Township of Tay is limited primarily to the larger communities of Victoria Harbour, Port McNicoll, and Waubaushene, all of which are located on Georgian Bay. As Phase 1 and 2 of Skyline's residential development builds out in Port McNicoll, demand for more local stores and services is likely to increase significantly including more speciality retail with visitor/tourist appeal. There is excess commercial building stock in Port McNicoll that may possibly be utilized for this purpose, with limited vacant units in Victoria Harbour and Waubaushene.

Penetanguishene is blessed with significant stock of historic commercial and residential buildings lining Main Street south of Poyntz Street running north to approximately Brock Street. Some of the niche stores that are more tourism-focused include the Froth Café, Captain Ken's, Remanys Clothing and Baby Boutique, and Green Block Trading specializing in native products and artwork.

With Main Street sloping down to the docks, the historic commercial district is naturally scenic. The Town has been active in promoting aesthetic improvements in this area through a Façade Improvement Program (in place since 2008) that provides grants to commercial property owners to upgrade the façade of their business. To date the program has provided 29 businesses with funding support. The Town also manages a Downtown Beautification Program which in 2012, offered business owners and interested residents the opportunity to sponsor or provide a financial donation towards a street banner or hanging basket on Main Street. The Town is proactive in its approach to development along Main Street, currently undertaking a visioning exercise to shape the look and feel of this strip over the longer-term. This is a part of a planned reconstruction project to replace the aging sewer and water lines on Main Street.

Penetanguishene's Planning Department hopes to introduce design standards by by-law to improve the consistency of style along this strip. An additional initiative on the part of the Town to improve the aesthetic appeal of the downtown strip has been the creation of a Downtown Improvement Committee with the eventual goal to form a Business Improvement Area (BIA). The town also participates in Communities in Bloom to improve the aesthetic appeal of the downtown core.

An issue identified by the Town's Planning Department in regards to encouraging tourism along the historic strip is that while Main Street slopes down to the docks, with the exception of the Dock Lunch – a no frills

fast food restaurant - activities at the water are relatively limited. Penetanguishene's Official Plan (currently under review) identifies the waterfront area as the focus of the Town's recreational system and its major tourist attraction. As such the Town is currently in the process of redeveloping the park adjacent to the docks with a theme of Samuel de Champlain: The park will commemorate his visit to the area four centuries ago in 1613. Design work on the park has been completed, and the Town is now in the process of securing funding for the redesign.

Commercial development in Penetanguishene has been relatively limited since 2009, most likely in response to the economic downturn in 2008, which has negatively impacted the town's economy. While the town has an attractive stock of historic buildings on its Main Street its relative proximity to the larger commercial centre of Midland may make commercial development more challenging. The town has several stores along the historic Main Street available for lease indicating there is currently an excess of commercial space. The ongoing construction of the residential development 'The Village at Bay Moorings', and the recent Georgian Village Retirement Complex, has the potential to generate tourism from visiting friends and relatives. This may help to stimulate greater commercial development in the downtown core.

The Township of Tiny is comprised of a series of small villages and settlement areas. The majority of housing runs linear along the Georgian Bay shoreline. Limited commercial activity exists in Wyebidge, Perkinsfield, Balm Beach and Thunder Beach. Balm Beach has some restaurants and other services with tourist appeal however this is fairly limited. Commercial activity in other settlement areas is limited to basic goods and services. This limited commercial activity is in part a result of the highly dispersed nature of settlement in the Township: Housing is spread linearly along the shoreline rather than in clustered settlement areas. Perhaps a more significant factor that has limited commercial development in Tiny is the seasonal nature of settlement: The local population doubles during the summer, making business difficult to maintain during the off-season.

Despite the highly seasonal nature of settlement that has prevented significant commercial development occurring, Township planning staff highlighted the growing trend of formerly seasonal residents, mostly retirees, taking up permanent residence in the area. This has the potential to increase the year-round demand for businesses and potentially increase commercial activity in the Township. The Township's Official Plan discourages further development along the shoreline, instead promoting new commercial development further inland in existing settlement.

2.5.4 Commercial Accommodation

Hotel and motel accommodations in Huronia are focused exclusively in Midland, with the town offering a total of 334 rooms across six facilities (note – there are an estimated 524 rooms in the entire area in hotel, motel, B&B, commercial cottages). Anecdotal discussions with hotel managers indicated that while the

hotels are fairly busy during the summer season, their trade is largely seasonal: Outside of the peak season, most rely on sport tournaments for bookings.

The Midland Inn and Suites, located on Highway 12, is a new facility that opened in spring of 2013. Most of the other hotels have been in business for some time, and are generally somewhat tired in terms of décor and facilities: Room exists for regeneration in the local industry to broaden the appeal of the region to a broader visitor base.

Hotel	Rooms
Best Western Highland Inn	120
Comfort Inn	60
Howard Johnson	35
King’s Inn	24
Midland Inn & Suites	30
Super 8	65

Source: Town of Midland Planning and Development Department (2013)

Discussion with Town staff indicated that Penetanguishene has a 20-acre brownfield site located on the waterfront (Ojibway Landing) that could potentially house a new hotel development alongside a current proposal for a Métis Cultural Centre. While existing hotels in Midland report excess capacity, given that there are no hotels in Penetanguishene, this may fill an existing but unmet demand, particularly if the facility can provide a higher price-point experience currently lacking in the region. This hotel may also fill the demand for visiting families and relatives of the new residents of the recently completed Georgian Village Retirement Complex at the southern end of Penetanguishene, given that existing accommodations in Penetanguishene are limited to several Bed and Breakfasts, and a ‘Floating Motel’ at the Hindson Marina. The Town has been proactive in pursuing development of the site into a hotel, with the mayor meeting with hotel companies to try to create a match. Discussions with Town planning staff indicate that the Town is currently reviewing its planning application process to streamline procedures and speed up approval times: This will help facilitate development on the site. Given that the potential site is brownfield land, there is potential for the Town to develop a Community Improvement Plan with a brownfield component to reduce the financial risks associated with development on the site.

The proposed Skyline development in Port McNicoll includes a new hotel with 150 rooms. The Township of Tay hopes to work with Skyline on their proposal to ensure that the hotel is built: This would be the first hotel in Tay, and would allow larger scale overnight visitation to the Township. Given that the proposed

hotel would be a part of a larger development with commercial and residential elements and historic attractions, it may generate additional visitation to the township that would support a new hotel.

Bed and Breakfasts are an additional form of accommodation in the region that offer an alternative to the commercial hotel format and allow visitors to stay in communities outside of Midland. As a larger community, Bed and Breakfast accommodations are still concentrated in Midland, however the smaller communities of Penetanguishene, Tiny and Tay boast thirteen altogether. A review of each Town and Township's zoning bylaw indicates that although Midland has the largest number of Bed and Breakfasts among Huronia's constituent communities, its municipal zoning by-law does not facilitate their development: The Town's approach to developing Bed and Breakfasts requires that the applicant applies to rezone their property at a fairly prohibitive cost. The Township of Tiny Official Plan permits Bed and Breakfasts in various land use designations however new establishments in these areas are subject to a rezoning process. Conversely, Tay Township permits Bed and Breakfasts in various land use designations, however new establishments in these areas are subject to a rezoning process. Penetanguishene allows Bed and Breakfast establishments in most residential and commercial zones. At present no community has any outstanding development or rezoning applications for Bed and Breakfasts. Consultation with owners of Bed and Breakfast establishments indicated that while there is a market for their accommodations, joint marketing initiatives in the area are lacking which potentially hinders the development of new, and the success of existing, B&Bs.

Campgrounds are an additional form of accommodation in Huronia. Awenda Provincial Park houses six campgrounds with 333 sites. The campgrounds welcomed 7,400 groups in 2011 indicating that it is a popular destination for campers. Huronia has an additional six private campgrounds spread between Midland, Tiny and Tay: Penetanguishene does not currently house a campground. Development applications in Tiny Township for two new campgrounds will potentially add an additional 433 new campsites and 10 cabins.

2.6 Future Opportunities

Based on the analysis of the existing tourism product throughout the region, the natural and cultural heritage resources, the industry consultation input the following is at least a partial list of future tourism development opportunities in the area. There is significant opportunity to expand the tourism seasons into the fall, winter and spring months.

Future Tourism Opportunities for Huronia Area

Aboriginal tourism product/experiences – telling the Aboriginal stories their own way
Waterfront lodging and dining
Fully connected regional multi-use trail system with loops
Further agritourism development
Expanded character accommodation options (B&B's, farm stays)
Historic villages as shopping destinations
Enhanced/expanded packaging of existing products into experiences
Designated touring routes with supporting infrastructure (motorcycle, bicycle, RV/car, pilgrimage)
Water connection to Georgian Bay Islands National Park
Ecotourism, responsible tourism
Creative interpretation of the wealth of local stories
Regional culinary tourism growth

Source: *the Tourism Company. 2014*



3. Demand Analysis

3.1 The National, Provincial and Regional Tourism Context

In 2012 total global tourism arrivals passed the one billion mark having grown at an average of 4% per year over the previous 10 years. Global tourism receipts exceeded \$1 trillion in 2012 having doubled within a 12 year period. Forecasts are for continuing growth of international arrivals at 4% per year for the next few years, although the forecasts for key emerging markets like the BRIC markets (Brazil, Russia, India and China) is for significantly higher growth (as high as 17% for China).

In 2012 tourism represented 2% of Canada's GDP providing for more than 600,000 jobs. This compares to a world average with tourism contributing 5.7% of GDP.

Canada's tourism sector plays a very significant but somewhat unheralded role in the economy. Some of the unique characteristics of the tourism industry may help explain this:

- It is an export industry but relies on temporarily importing visitors to purchase experiences and products;
- It is a geographically diffuse industry unlike other more visible and localized industries;
- There is significant cross over between tourism and other industries and sectors.

In a rapidly growing world tourism market Canada is struggling to compete. In 1970 Canada was the world's second most popular destination and in 1990 Canada stood in 10th position globally. In 2011 Canada fell to 18th place. Since 2000 the number of international travellers to Canada has declined by 20%. A large portion of this is due to the declines in US visitation in particular.

The Tourism Industry Association of Canada along with the Canadian Tourism Commission believe the issues for Canada keeping pace with international tourism growth can be resolved. The recent annual report on the Canadian Tourism Industry prepared by TIAC in association with HLT Advisory lays out a recommended plan to enable Canada to match the annual global growth rate of 4% going forward. The plan calls for:

- Increased resources for the Canadian Tourism Commission;
- A review of Canada's aviation cost and access barriers;
- A modernized traveller documentation process.

One thing is certain and that is that the Canadian tourism industry will be working hard to overcome the issues and turn the tourism situation for Canada around.

3.2 The Value of Tourism

According to the UN World Tourism Organization tourism is one of the world’s largest and fastest growing industries and according to the Conference Board of Canada the contribution from travel and tourism to the Canadian GDP is bigger than agriculture, fishing and hunting combined.

The benefits of tourism go beyond employment and new business development. The Tourism Industry Association of Canada (TIAC) annual report for 2013 states:

Travel is of vital importance to the Canadian economy driving job creation, private and public sector investment, social, cultural and community development while generating significant government revenues and pride of place.

Because there is so much cross over between tourism and other sectors tourism can be an important driver for the transportation, accommodation, food and beverage, recreation, entertainment, culture and travel service sectors.

Recent research by Deloitte has determined that there is a correlation between international tourism visitation and the export of goods between the destination country and the visitor country. A rise in business and leisure travel between countries can be linked to subsequent increases in export volumes to the visitor countries as well as increases in the variety of goods sold. Using Statistics Canada data Deloitte have shown that a 1% increase in Canadian international arrivals could generate an \$817 million increase in Canadian exports.

Person-Trips and Spending While on a Trip in Canada, 2011		
	Person Trips	Spending per person-trip
Domestic same-day	211,720,000	\$87
Domestic overnight	107,977,000	\$260
US Visitors same-day	8,496,000	\$52
US visitors overnight	11,597,000	\$529
Overseas same-day	416,000	\$29
Overseas overnight	4,106,000	\$1,429
Same-day	221,083,000	\$86
Overnight	123,680,000	\$324

Source: Statistics Canada, ITS and TSRC 2011

Tourism also provides significant indirect benefits to the Canadian economy. According to Statistics Canada data, a \$100-million increase in direct tourism expenditures would generate \$69 million in indirect spending.

This figure is more than the same increase in direct spending would generate in the auto manufacturing sector, mining, or oil and gas extraction industries.

It is also interesting to note that with an increasingly transient world and with migrant workers travelling more and more to find work tourism through what is referred to as VFR, or visiting friends and relatives continues to increase.

It is important for a destination like Huronia to consider tourism yield more than number alone. The following chart illustrates the difference in expenditure between different categories of visitor. In general the further afield a visitor travels from the higher the yield from their visit.

Tourism in Huronia

Currently 524 commercial accommodation rooms (hotel, motel, B&B, commercial cottages), 976 campsites & 3,977 marina slips

8,300 seasonal residences in Huronia area

Estimated 810,300 overnight person visits and 1,216,000 day visits in 2010

3.3 Huronia Area Visitation Characteristics and Trends

As with many other local destination areas in Ontario, comprehensive tourism data tracking the volume and characteristics of visits and visitors to the Huronia Area is unavailable. The consultants have been able to gather data from some attractions and visitor information centres, however it does not provide a complete picture of tourism in the area.

The best available data is collected for Simcoe County by Statistics Canada through their domestic and international travel surveys for the period 2006-2010. Although it is for a destination area that contains, but is larger than the study area, the data is reliable and provides a breadth of information regarding visit and visitor numbers and characteristics.

Selected Simcoe County person visit counts from the 2010 and 2006 data collected by Statistics Canada are reported below.

The consultants' have prepared estimates of comparable counts for the study area based on the following methodology.

Step 1: Determination of the amount of commercial accommodation currently available within the study area – 524 rooms (hotel, motel, B&B, commercial cottages) and 976 campsites (commercial campgrounds). It is assumed that the number of rooms and campsites available within the study area in 2010 was approximately the same as the current number.

Step 2: Estimation of the number of study area overnight person visits captured by commercial accommodation in 2010:

- Length of season for roofed accommodation (524 rooms) was assumed to be 365 days;
- Length of season for campgrounds (976 campsites) was assumed to be 150 days (mid-May through mid-October);

- Available commercial accommodation nights was calculated as sum of 524 rooms for 365 nights (191,260) and 976 campsites for 150 nights (146,400) = approximately 338,000;
- Occupied commercial accommodation nights was calculated assuming a 60% occupancy rate = approximately 203,000; and
- Overnight person visits in commercial accommodation was calculated by multiplying occupied commercial accommodation nights by an average party size of 3.3 (for Simcoe County in 2010) and dividing by an average length of stay of 2.5 nights (for Simcoe County in 2010) = 267,000

Step 3: Calculation of total number of study area overnight person visits by assuming that overnight person visits in commercial accommodation represented 33% (same as for Simcoe County in 2010) of total = 810,000.

Step 4: Calculation of total number of study area person visits by assuming that overnight persons visits represented 40% (same as for Simcoe County in 2010) of total = 2,026,000.

Step 5: Calculation of total number of study area same day person visits as difference between total study area person visits (2,025,800) and total study area overnight person visits (810,300) = 1,216,000.

In addition, where consensus information obtained from Huronia Area tourism industry stakeholders (during interviews, online survey and/or workshops) suggests that the pattern in the study area differ from those for Simcoe County, the differences are noted.

3.3.1 Total Person Visits

In 2010, Simcoe County attracted 6.76 million person visits, up 32% from 5.13 million in 2006.

The consultants have estimated that the study area captured approximately 2.026 million person visits in 2010.

In general, Huronia Area tourism industry stakeholders believe that very little if any of the Simcoe Country growth was captured in the Huronia Area, with Collingwood/Wasaga Beach to the west and Orillia/Rama to the east being the primary growth areas in Simcoe County.

3.3.2 Same Day and Overnight Person Visits

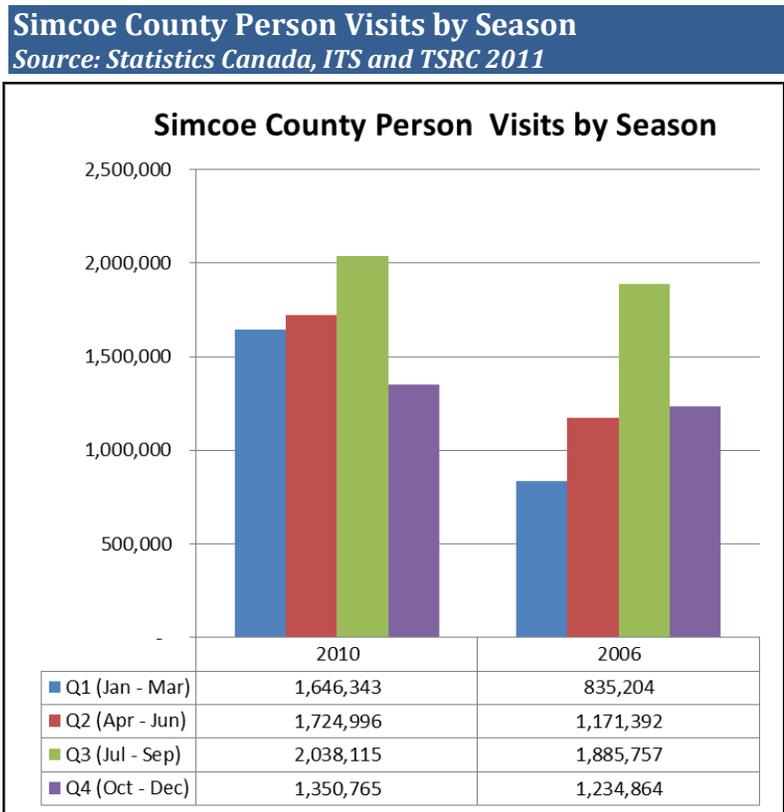
In 2010, 60% of total person visits in Simcoe County were “same day” (4.049 million), while the remaining 40% were overnight or longer (2.712 million). This represents a 36% increase in same day visits compared to 26% increase for overnight visits.

The consultants have estimated that the study area captured approximately 1.216 million same day person visits and 810,000 overnight or longer person visits.

In general, Huronia Area tourism industry stakeholders believe that same day person visits are growing more quickly than overnight or longer person visits, particularly given the minimal change in commercial accommodation since 2006.

3.3.3 Person Visits by Season

As illustrated in the chart below, in 2010 July through September (30% of total annual) was the most popular season for visits to Simcoe County, followed by April through June (26%) and January through March (24%), and January through March (20%). Since 2006, the January through March (+97%) and April through June (+47%) seasons have shown substantial growth, leading to a flattening of the typical seasonal visitation pattern.



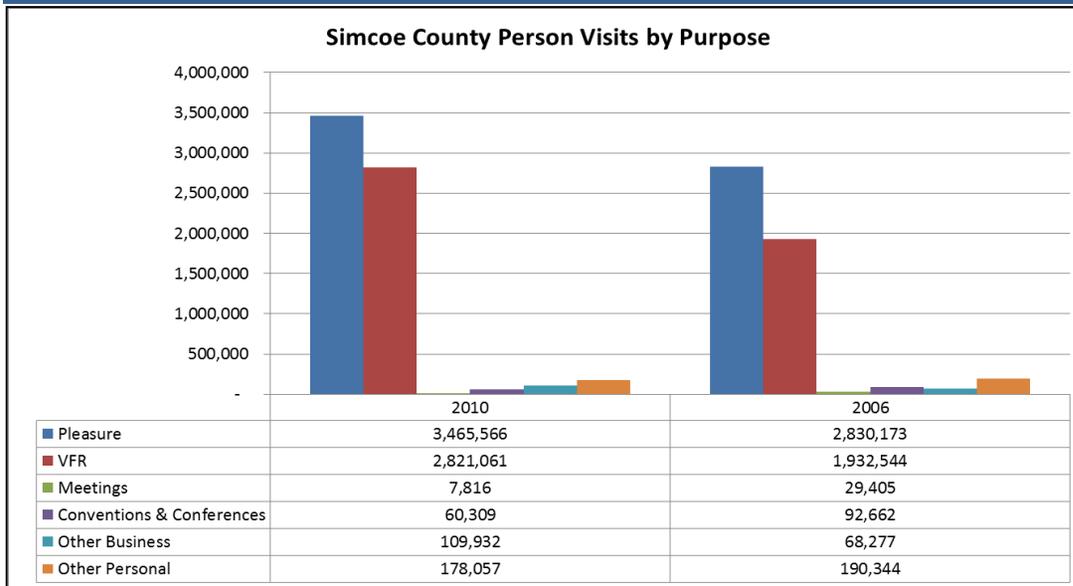
Hurononia Area tourism industry stakeholders believe that the study area has not experienced a comparable level of growth in January through March, and April through June seasons resulting in a seasonal pattern that more closely resembles the 2006 pattern for Simcoe County.

3.3.4 Person Visits by Purpose

As illustrated in the chart below, in 2010 travelling for pleasure was the most popular reason for trips to Simcoe County accounting for 51% of all person trips, followed by VFR (visiting friends or relatives) contributing 42% of the total. Since 2006, VFR visits grew more than twice as quickly as pleasure visits, increasing by 46% compared to 22%. During the same period, visits for “other business” increased while visits for “meetings”, “conventions & conferences” and “other personal” purposes declined.

Simcoe County Person Visits by Purpose

Source: Statistics Canada, ITS and TSRC 2011



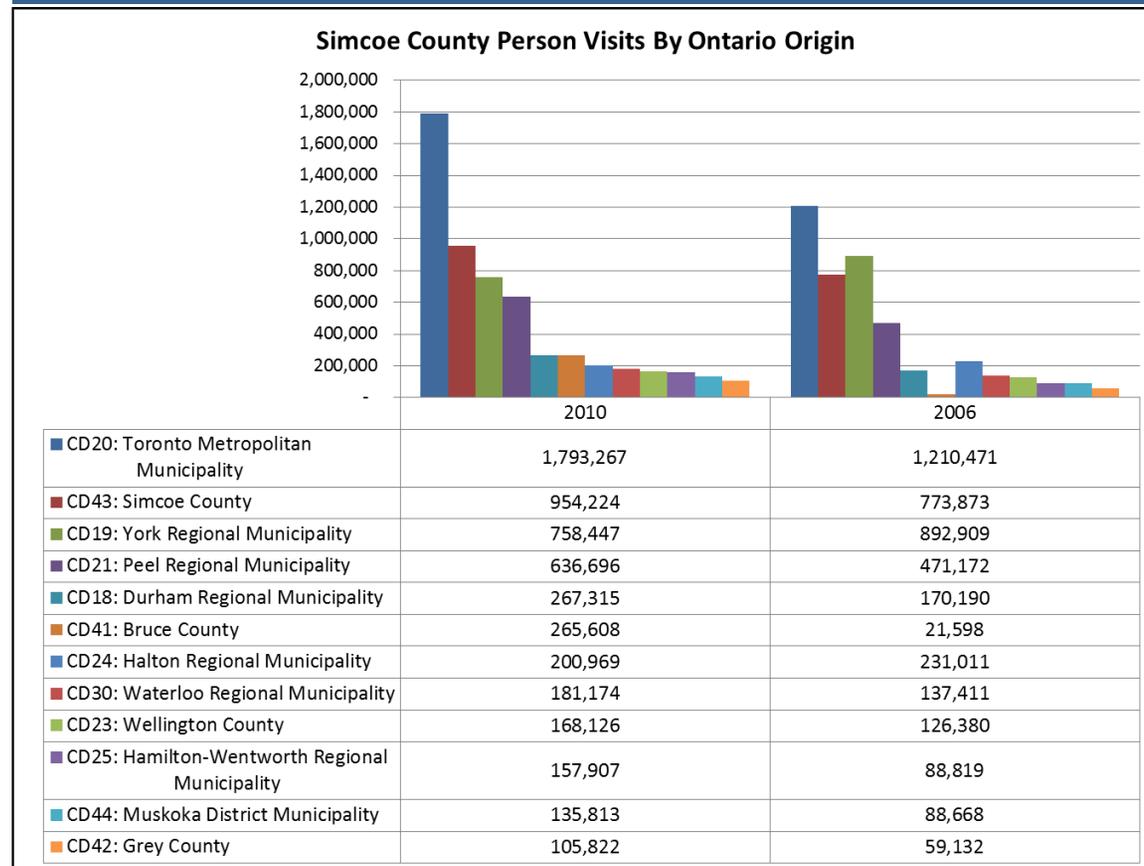
If in 2010 the study area pattern was the same as that for Simcoe County overall, approximately 1.03 million person visits would have been pleasure trips, while approximately 851,000 would have been to visit friends or relatives. Based on the information gathered during the study, it is likely that these were by far the most common purposes for visits to the study area, while it is possible that the total number of person visits with friends or relatives exceeded the number of pleasure trips.

3.3.5 Person Visits by Origin

In 2010, approximately 96% of all visits to Simcoe County were from Ontario origins, while 2% were from the U.S.A., 1% was from overseas, and the remaining 1% was from Canadian provinces other than Ontario.

Simcoe Country person Visits by Ontario Origin

Source: Statistics Canada, ITS and TSRC 2011



Between 2006 and 2010, visits from Ontario origins grew 34%, while visits from U.S.A. and overseas origins contracted by 1% each. Visits from Alberta (+246%), British Columbia (+55%), Saskatchewan (+34%), and Quebec (+17%) origins increased while visits from other provinces all declined.

As illustrated in the chart above, within Ontario the most common origin for visitors to Simcoe County in 2010 was the Toronto Metropolitan Municipality (27% of all person visits), followed by Simcoe County (14%), York Regional Municipality (11%), and Peel Regional Municipality (9%). Between 2006 and 2010, the number of person visits from the Toronto Metropolitan Municipality grew by 48%, from Simcoe County by 23%, and from Peel Regional Municipality by 35%, while the number from York Regional Municipality contracted by 15%. The origins with the greatest amount of growth were Bruce County at 1,130%, Kawartha Lakes 170%, Grey County 79% and Hamilton-Wentworth Regional Municipality at 78%.

If the pattern of origins for visits to the study area in 2010 was the same as for Simcoe County overall, approximately 547,000 person visits would have originated from the Toronto Regional Municipality, while 284,000 would have originated in Simcoe County, 223,000 in York Regional Municipality, and 182,000 in Peel Regional Municipality.

3.3.6 Person Visits by Activity

As illustrated in the chart below, in 2010 the most popular activities undertaken while visiting Simcoe County were boating (6% of all person visits), visiting casinos (5%), visiting National/Provincial Parks (5%), Golfing (5%), downhill skiing/snowboarding (4%), attending cultural performances (4%), fishing (4%), attending sports events (3%), visiting historic sites (3%), and visiting museums/art galleries (2%).

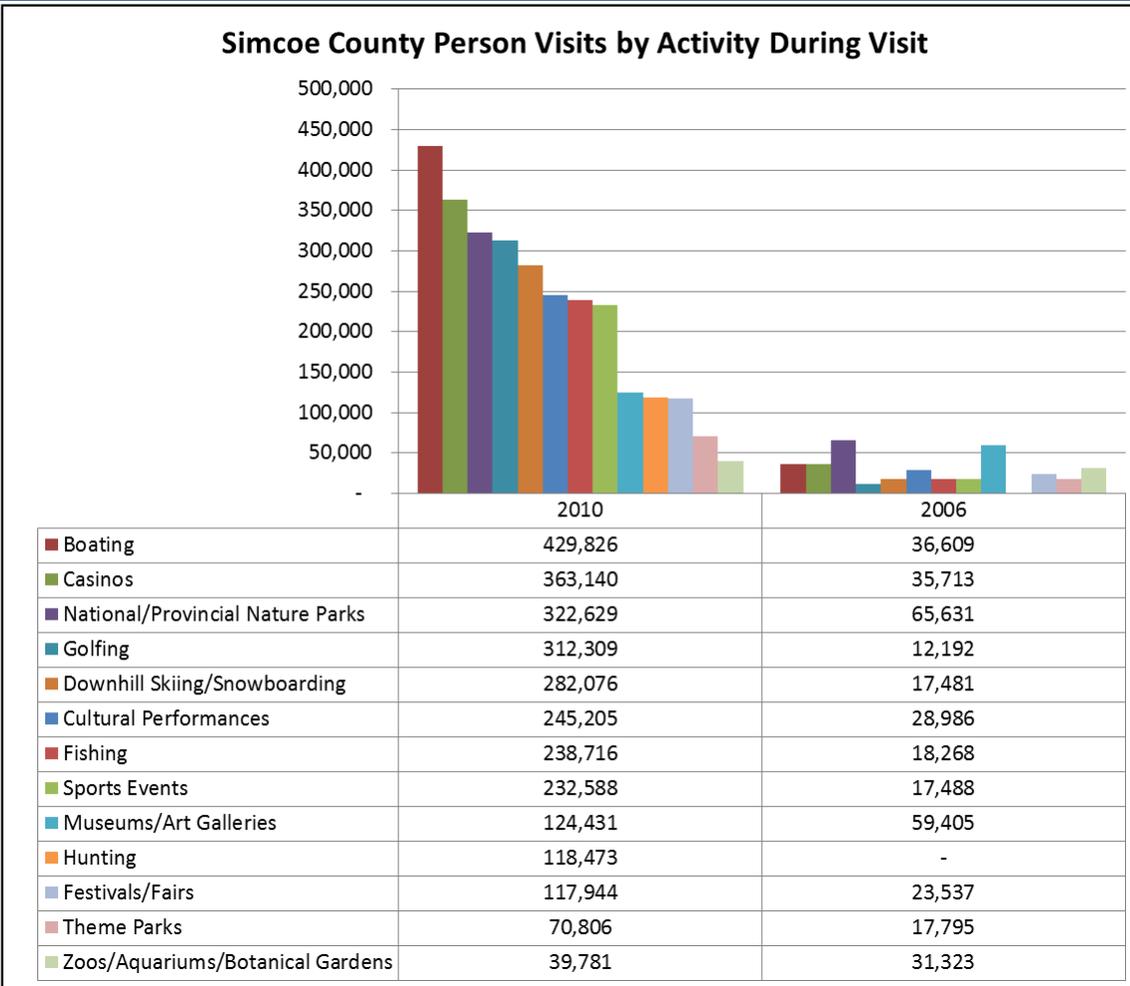
Between 2006 and 2010, participation in all of these activities increased phenomenally.

By comparison, the study area:

- offers 10 of the top 12 activities -- does not offer casinos or downhill skiing/snowboarding (or minimal); and,
- attracts more than a proportional share of visits to historic sites within Simcoe County -- 5% (approximately 100,000) to Martyr's Shrine and 4% (approximately 80,000) to Sainte-Marie-Among-the-Hurons vs. 3% for overall County historic sites.

Simcoe County Person Visit by Activity During Visit

Source: Statistics Canada. ITS and TSRC 2011



3.4 Trends That May Influence Future Tourism Markets

When looking at longer-term tourism strategies it is important to understand the major market trends that may influence the characteristics and origins of future tourism markets. The world economy is shifting and creating new markets and new sources of competition. There are major growth opportunities and increasing competition. Some of the key trends to consider with the Huronia Area Tourism Action Plan are summarized below.

The Orient Express: The geographic positioning of the world economy is shifting from west to east and from north to south. New markets of staggering potential are beginning to emerge in countries such as China and India, as well as select Eastern European, Gulf States, Australia, Korea and South American markets. It is expected that the BRIC countries (Brazil, Russia, India and China) will drive international tourism growth from 2015-2017. In 2013 the Chinese outbound market exceeded the US and Germany as the largest source marketing the world. And it is the middle class market that is driving this growth. In Asia alone over 1 billion people will be moving into middle class and become a large new travel market.

A combination of factors including the Chinese government allowing select foreign tour companies like Tui and American Express to enter the Chinese outbound market, combined with a wave of Chinese outbound travellers who are on their second or third trips out of the country will result in an increase in travellers travelling independently (FIT – free and independent travel) and increasingly off the beaten path. South America has been experiencing soaring international tourism expenditures, increasing by 50% in 2010 and 30% in 2011.

The world population is ageing and travel will increase at both ends – younger and older age cohorts. The two big markets will be the Millennials (those born since the early 1980's) and the Elder markets. The Millennials are now a generation larger than the baby boomers. According to the CTC the youth travel segment (i.e. travellers aged 18-29) is significant in size with 187 million travellers, representing 20% of annual global arrivals, and is tourism's fastest-growing traveller segment (increasing 3-5% per year). Youth are valuable travellers because they tend to take longer trips and spend more overall than other segments. According to a recent report titled *2014 Trends in Travel and Tourism* published by Resonance Consulting the elder market worldwide is estimated at 1.3 – 1.6 billion and they are a market that favours off-peak travel times.

The natural advantage: Global biodiversity and habitats are disappearing and remaining pristine and intact natural habitats and areas are of increasing value.

Climate change is one of the most important long-term issues facing the tourism industry. It is already having an impact on the tourism seasons (i.e. shorter snow seasons) and travellers buying behaviour (i.e. seeking more sustainable travel solutions and destinations). These trends will increase and the demand for

Key Trends

The orient express

The natural advantage

Great expectations

Expect the unexpected

Digital storytelling

On the move

Canada's USP's

Vibrant cities (on the edge of nature)

Personal journeys by land, sea, air, rail

Connecting with Canadians

Award-winning local cuisine

Active adventure

ecotourism or sustainable tourism will increase. The increasing likelihood of climate and emission taxes along with the rising cost of gas will undoubtedly change travel patterns.

Great expectations: With growing income and traveller sophistication the focus is increasingly on authentic, unique and personalized experiences.

Travellers are increasingly looking for the most local experience possible from accommodation, to retail, to food, to connecting with local people. They want authenticity and uniqueness. They are looking for local foods, local character accommodation, and opportunities to interact with locals and historic towns and boutique/independent retail.

Expect the unexpected: Sudden and hard to predict events (weather, disease, safety related) is potentially increasing. The past 15 or so years have clearly illustrated the unexpected and sometimes devastating impacts that can occur in the tourism sector from unpredictable events like SARS, 9/11, and major storms.

Digital storytelling: Information flows more rapidly with the internet and credibility of information sources is changing.

The internet is having a profound effect on travel, in terms of the way people now research and book vacations and the way destinations market and distribute product. The internet is a pull medium so it is becoming increasingly important for destinations to know more about the motivations and interests of consumers. The internet is also enabling consumers to increasingly seek advice from other consumers. According to Google research on The 2013 Traveller the following are the six most important features for new consumers in choosing a destination:

- Price
- Activities specific to interests
- Past experience with the destination
- Variety of activities
- Can relate to the destination
- Promotion

The Google research also points out that 58% of leisure travellers rely on online sources to evaluate activities while at a destination. Mobile apps are replacing the concierge of the past.

On the move: People are travelling further and more frequently and increasingly off the beaten path. As one example current research on the massive Chinese outbound market suggests that an increasing number of second or multiple time Chinese visitors will be travelling independently rather than in group tours, and looking to explore out of the way places where they can gain deeper experiences and interact with local populations. This trend bodes well for destinations like Huronia that are somewhat off the beaten path.

3.5 The Marketing Context

Leverage is key – working in collaboration with others to create a louder, stronger voice in the marketplace. It is critical to understand the broader tourism marketing context in order to identify leverage opportunities. The following is a summary of the marketing hierarchy within which future Huronia marketing will need to fit. Understanding the target markets being pursued by the Canadian Tourism Commission, the Ontario Tourism Marketing Partnership and RTO 7 can assist in prioritizing the directions being taken in Huronia.

3.5.1 Canadian Tourism Commission

The Canadian Tourism Commission (CTC) is Canada’s national tourism marketing organization with a mandate to sustain a profitable tourism industry by marketing Canada as an internationally competitive, premier four-season tourism destination where travellers can indulge in extraordinary experiences. Marketing Canada under the brand “Canada, Keep Exploring’ the CTC are working to bridge the world’s nature-based perceptions of Canada by focusing on the warm, witty and inviting personality of Canadians. The tourism brand is intended to showcase Canada as a place that offers travellers an opportunity to create their own stories and experiences that are a little unexpected, unusual and out of the ordinary.

The CTC was set up in 2001 as a federal Crown corporation to initiate a cooperative approach to marketing the country alongside industry stakeholders. It is largely funded through annual parliamentary appropriations, estimated at \$61 million for 2013 and \$58 million for 2014. A 12 member Board of Directors governs the organization with appointees from different sectors of the tourism industry. Marketing plans are development with assistance from a number of industry committees focused on core and emerging markets, brand experiences, Meetings, Conventions and Incentive Travel (MC&IT) and research.

In order to increase the impact of the government’s investment in Canada’s tourism marketing, the CTC actively partners with industry to develop marketing programs and leverages cash and in-kind partner contributions.

The CTC focus for 2013 has been on driving leisure travel business from Canada’s top ten overseas markets (UK, France, Germany, Australia, Japan, China, Mexico, South Korea, Brazil and India), as well as MC&IT business from the US, the UK, France, Germany and Belgium. These 11 primary markets account for 81% of Canada’s international tourism receipts. A number of years ago the CTC dropped their domestic marketing program requiring the provincial agencies to pick up the ball. They have also been cutting back on the US market with the exception of US MC&IT markets.

The CTC has identified the following five competitive strengths (unique selling propositions) for Canada:

- 1. Vibrant cities (on the edge of nature);
- 2. Personal journeys by land, sea, air, rail;

- 3. Connecting with Canadians;
- 4. Award-winning local cuisine;
- 5. Active adventure among awe-inspiring natural wonders.

Fundamental to CTC's global marketing and sales success is the CTC's proprietary research and segmentation tool Explorer Quotient, a tool that helps to go beyond traditional demographics providing insights into actionable travel motivations and social values. The following are the current target markets for the CTC.

Learners

- **Authentic Experiencers:** Older and highly educated, they relish experiencing all their travel destination has to offer in a reserved, non-exorbitant way. They are drawn to history and prefer to travel independently.
- **Cultural Explorers:** Avid, open-minded and socially engaged travellers who immerse themselves in all aspects of the travel experience. They seek spontaneous and authentic experiences on their own terms.
- **Cultural History Buffs:** Highly educated and often single, they like to travel alone or with one other. Life-long learners, they seek the quiet discovery of the cultural and historical aspects of their destinations.

Enthusiastic Indulgers

- **Free Spirits:** Young, experimentalist, committed travellers looking for thrills and frills. They seek some structure when they travel to engage in worry-free hedonistic activities.
- **Social Samplers:** Well-educated, older, open-minded and often female travellers who prefer to focus on the "must-see" attractions. They are active planners and have an affinity for travelling in groups.

The learner markets in particular offer potential for a destination like Huronia.

3.5.2 Ontario Tourism Marketing Partnership

In order to promote Ontario as a year round tourist destination the OTMPC develops an annual marketing plan in collaboration with industry led market committees and their Board of Directors, also comprised of industry and government stakeholders. The plans are research-driven, they respond to market trends and they respond to the interests of provincial tourism industry stakeholders. Each year the marketing plans incorporate partnership and buy-in opportunities for industry partners to maximize overall impact and leverage resources.

Travel forecasts from the Ministry of Tourism, Culture and Sport suggest slow growth in visitation from within Canada and from developed countries with a much stronger growth rate from emerging markets like China, Brazil, and India. However it is expected that some of the mainstay traditional markets, like the provincial domestic market, the US and the United Kingdom, will continue to account for the largest volume of visits and visitor expenditures in absolute terms.

For identifying target markets the OTMPC utilize Environics Analytics geo-demographic analysis using the Travel Activities and Motivations Survey (TAMS) research database. The research identifies Ontario's target consumers, what they want, and what media channels are best to reach them.

The target geographic markets for OTMPC include the following:

- Ontario with a significant focus on new immigrants and their friends and relatives
- Quebec – the second largest source of domestic travellers
- US – near and mid States
- U.K.
- China
- Germany
- Japan
- Brazil
- France
- India
- South Korea
- Mexico

There is potential for Huronia to leverage off the OTMPC marketing to the GTA New Immigrant and Quebec markets in particular.

3.5.3 RTO 7 - BruceGreySimcoe

RTO 7 markets the region under the BruceGreySimcoe (BGS) brand. The strategic goal of RTO 7 marketing campaigns is to drive traffic (referrals) to operators. The geographic target markets for RTO 7 are the GTA, South Western Ontario, and inter-region. The primary geographic target is the GTA.

In their marketing plans RTO 7 identify the strategic assets for the region as follows:

- Golf
- Skiing/ snowboarding
- Trails

- Beaches
- Inland canoeing
- Big water canoeing/kayaking
- Cycling/ mountain biking
- Nature parks
- Festivals
- Resorts/ spas
- Touring towns and villages
- Wineries
- Fun parks/ rides/ water parks
- Casino/ gambling
- Culinary

To complement the draw of Georgian Bay and the landscapes in the region RTO 7 is working to incorporate the emotional benefits aligned with fun adventure and a welcoming, friendly atmosphere into their marketing campaigns. They identify the following key strengths or unique selling features for the region.

- Unique and diverse outdoor experiences
- An all-season destination
- Getaways
- Culinary

RTO 7 now utilize OTMPC Consumer Insight Research to define the target market segments for their campaigns and for 2013 the target market segments are identified and defined in the marketing plans as follows:

Up & Coming Explorers: This is a youth-oriented group that is on its way up in the world. These travellers are emerging into a new life-stage, often characterized by greater affluence and new opportunities. Visible minorities and immigrants often fall into this segment. Travel is not about connecting with family or friends. While these people often want to be adventurous and energetic their travel experiences often start with what is nearby and typically with core tourist attractions. Ontario is popular with this group and visitation is typically very recent.

Connected Explorers: This segment has a psychological need to take a break from the everyday and be exposed to new experiences and knowledge. They are committed to expanding their horizons through travel. Interestingly, the Internet and new technologies are key instruments in facilitating these travel interests & experiences. They research, book and share travel experiences through new technologies – before, during and after trips.

Nature Lovers: This is a consumer segment attracted to outdoor experiences aligned to Ontario's quintessential parks & lakes offering. Camping and associated activities, e.g., hiking, canoeing, fishing are key interests for this group. The majority classify as "nature lovers". Activities align with the recreational aspects of the outdoors and not necessarily the extreme aspects of the outdoors, e.g., avid angling or hunting. Not surprisingly, the travel style is basic with camping prevalent.

Pampered Relaxers: This segment is defined by an orientation toward pampering and resort life experiences. This very often involves beach experiences, water and sun destinations in winter. For this segment, vacations are a time to relax and re-energize often through high-end sophisticated activities.

Sports Lovers: This group, skews more male, and is driven by a love of sports, either watching or participating. By the nature of their passion these people describe themselves as more active and energetic than most. In reality their sports are not necessarily extreme more in keeping with what is readily available, and more likely to be organized team sports and golf.

Hurononia can create experiences targeted at most of these market segments, with the one exception being the Pampered Relaxers.

3.5.4 The Local Marketers

Tourism Simcoe County, the organization within Simcoe County charged with assisting the tourism sector have recently prepared an Economic Development and Tourism Action Plan, which outlines their roles within the county tourism sector as follows:

- Continue to work with RTO 7;
- Develop a searchable database and asset map;
- Promote tourism and cultural assets;
- Raise awareness of the economic contribution of agriculture and agritourism assets;
- Develop a tourism business development toolkit;
- Work with local arts and culture organizations;
- Partner with Lakehead University and Georgian College for regional certification and standards;
- Advocate to and build relationships with local media;
- Expand and promote events that support cultural enterprises and cultural tourism;
- Promote awareness of provincial funding programs.

Hurononia is one of two areas within Simcoe County not covered by DMO's. According to the Executive Director with Tourism Simcoe County one of the roles they have is to help develop and nurture new initiatives like the Food Trail and then spin them off to the regional DMO's, which in the case of Huronia does not exist.

SUMAC (Simcoe County's Cultural Network) is another Simcoe County wide organization involved in tourism marketing, but with a focus on the cultural attractions. They currently have 14 members representing 15 cultural attractions and sites in the region with 4 in the Huronia area.

Within the Huronia area there are a number of organizations who would be considered sophisticated tourism marketers including Huronia Historic Parks, Parks Canada (GBI NP), Ontario Parks (Awenda PP), Parkbridge Marinas, and in more focussed ways the Southern Georgian Bay Chamber of Commerce (with their new app and guidebook), Georgian Bay Coastal Route and the Southeast Georgian Bay Chamber of Commerce (covering an area which includes part of Tay Township) and municipal efforts. However up until this point in time there has been no brand or clear regional identity to the region which has limited the effectiveness of Huronia area marketing. There is no leadership in the regional marketing effort and with limited hotel infrastructure and no hotel association there is little potential for implementing a destination marketing program (i.e. through a destination marketing fee or levy). The opportunity then is to stimulate collaboration among these players and provide a more coordinated approach under the umbrella of a regional brand.

There is significant confusion in the messaging regarding the regional name, let alone a brand that can stand out in the increasingly crowded marketplace. For example South Georgian Bay has become closely associated with the region just west of Huronia covering Wasaga Beach, Collingwood and the Blue Mountains, and Meaford. And yet it is still used within the Huronia area. Huronia itself is a term that is currently, and has historically been, used to cover a larger geographic area corresponding with the historic territory of the Huron Wendat peoples, generally Simcoe and Grey Counties.

There is some packaging of product to create targeted experiences and associated marketing within the Huronia area but far from enough. There is a need to develop more market responsive experiences and coordinate the marketing being undertaken by each of the Huronia area marketing stakeholders listed above.

Some visitor services are provided within the region like the Visitor Information Centres run by the municipalities, and the Chamber centre but there is need for more coordination and a more comprehensive effort to satisfy visitor needs throughout the path to purchase and during their visit to the region.

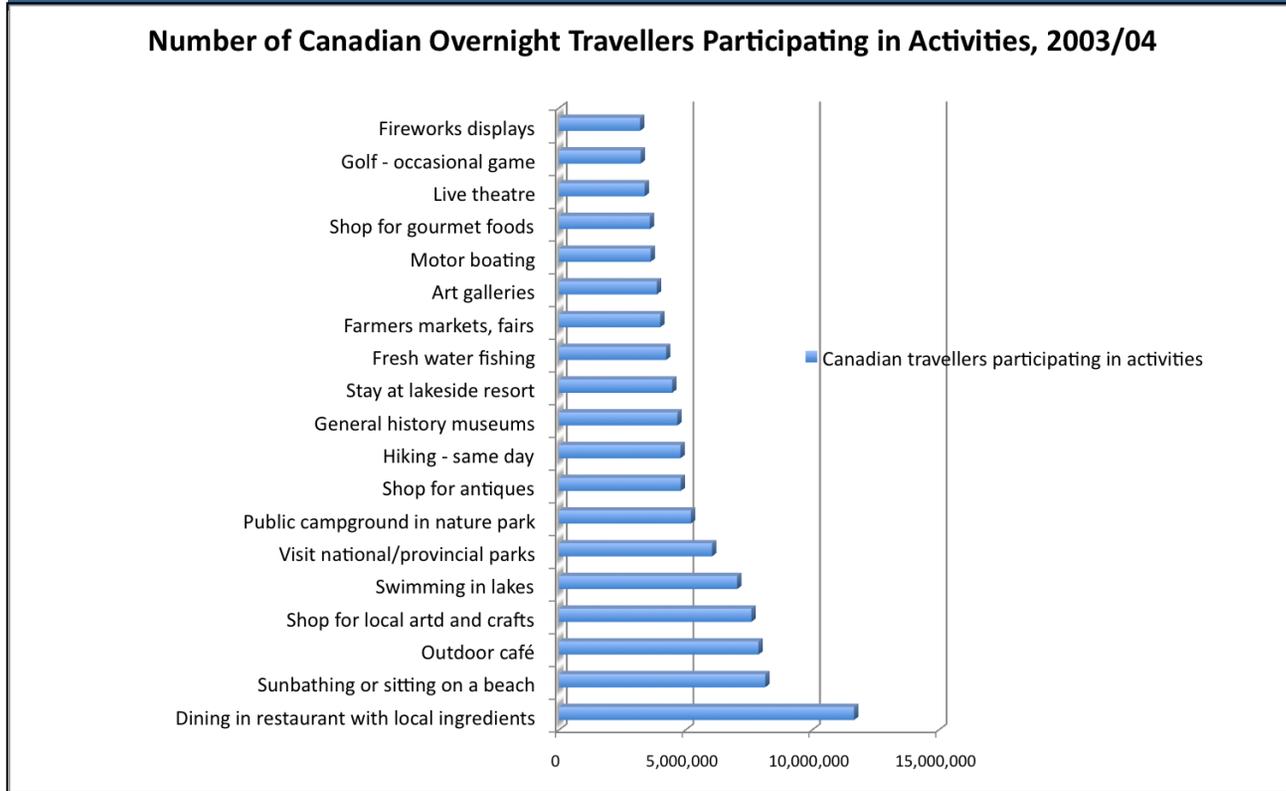
3.6 Market Opportunities

The following section presents a summary of the higher potential (growth) market opportunities that the Huronia area could pursue in collaboration, providing benefits to each of the four municipalities. The most obvious geographic market opportunity to be pursuing is the GTA, followed by Quebec, the US and overseas markets visiting southern Ontario. The limited and relatively low end accommodation plant would be a hurdle in pursuing the international travel trade (tour operators). There are many different ways to segment

the markets based on activity, demographic characteristic, geographic origin, psychographics etc. To give some sense as to the scale of activity market opportunities the following two charts have been created from the TAMS (Travel Activities and Motivational Survey) database completed in 2006. This is still the best source for this type of data. The chart below, illustrates those activities relevant to Huronia with over 3 million travellers participating while on an overnight trip.

Number of Canadian Overnight Travellers Participating in Activities (over 3 million travellers)

Source: Travel Activities and Motivation Survey (2006)

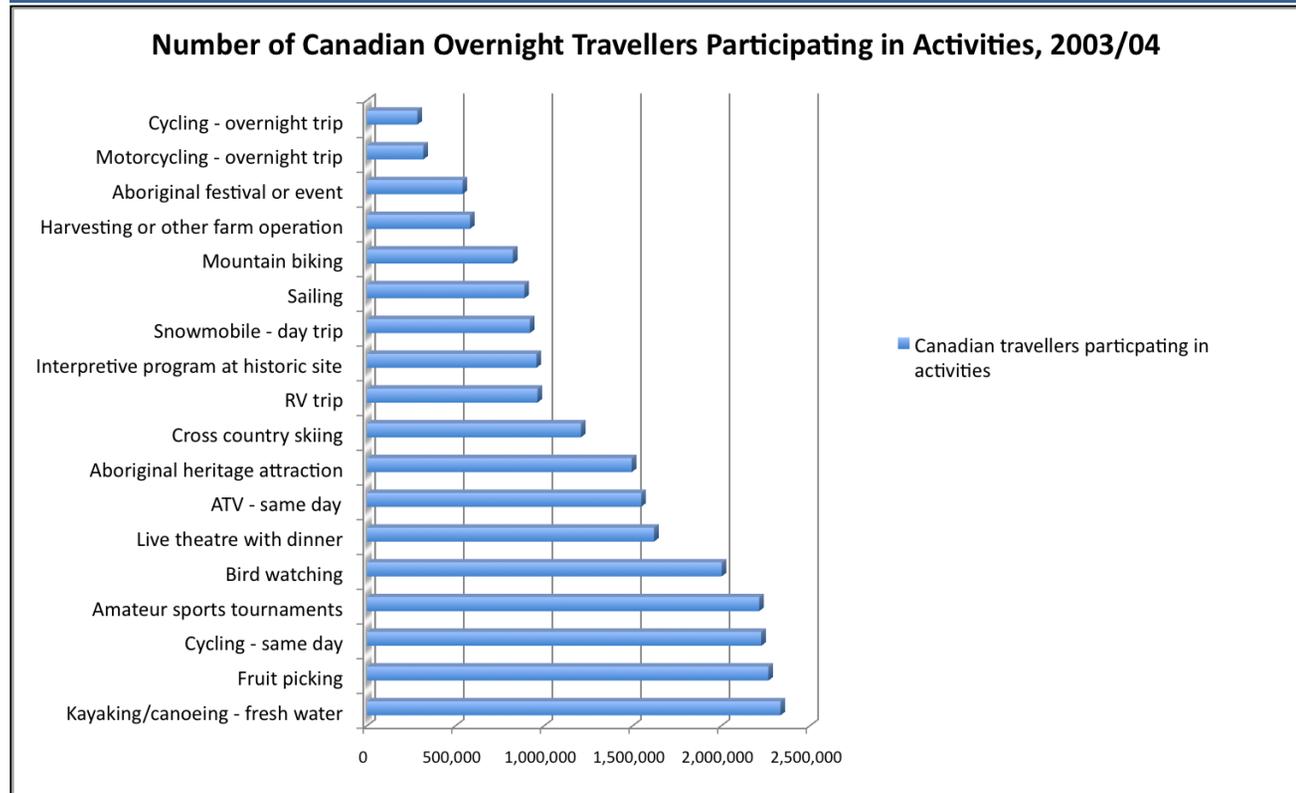


- Key Market Opportunities**
- Culture & heritage
 - Aboriginal culture
 - Soft adventure
 - Touring
 - Boating & cruising
 - VFR
 - New Canadians
 - Sport tourism

The chart, below, includes those activities relevant to Huronia Area with fewer than 3 million travellers participating while on an overnight trip.

The following markets represent opportunities for Huronia. There will certainly be overlap between some of the following segments but they each provide a distinct segment that can be targeted with marketing tactics.

Number of Canadian Overnight Travellers Participating in Activities (under 3 million travellers)
 Source: Travel Activities and Motivation Survey (2006)



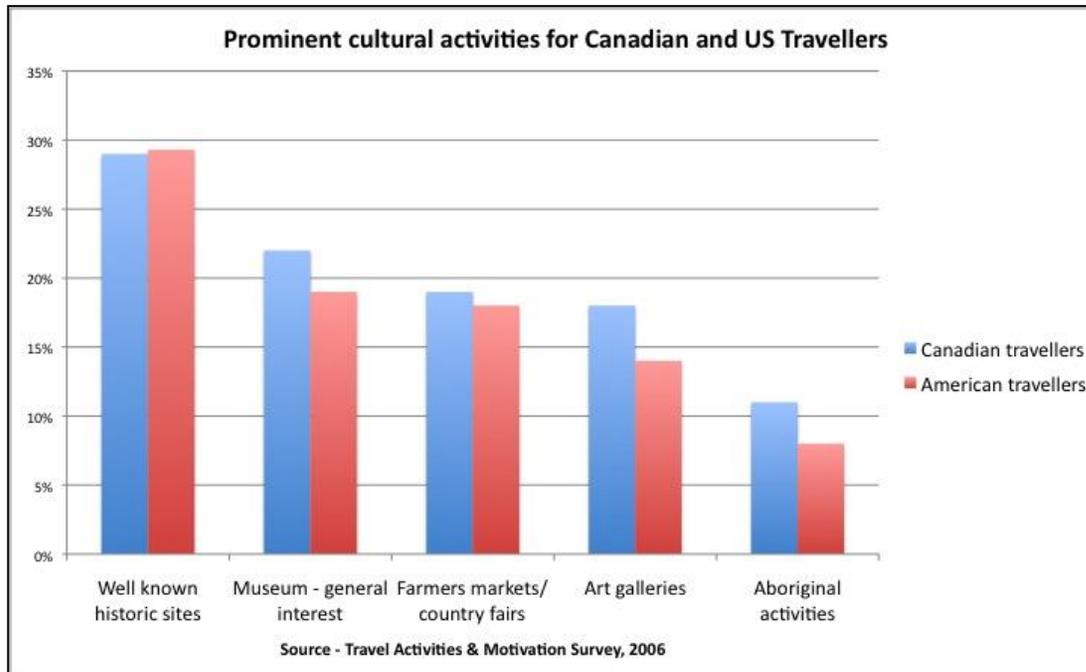
3.6.1 Culture & heritage

The ageing baby boomers in Canada and the US are avid cultural consumers and they are reaching the point where they will have the time and inclination to travel more as they retire and/or become empty nesters. Culture and heritage is emerging as a strong complementary motivator to nature-based activities for this market. Based on the TAMS research for both Canadian and American travellers shopping and dining (increasingly looking for local foods) top the list of their travel activities. Cultural and heritage activities are the next most important activities for most travellers. Food and dining in local restaurants is one of the top activities for travellers. Agritourism and culinary tourism can provide an authentic taste of place.



Prominent Cultural Activities for Canadian and US Travellers

Source: Travel Activities and Motivation Survey (2006)



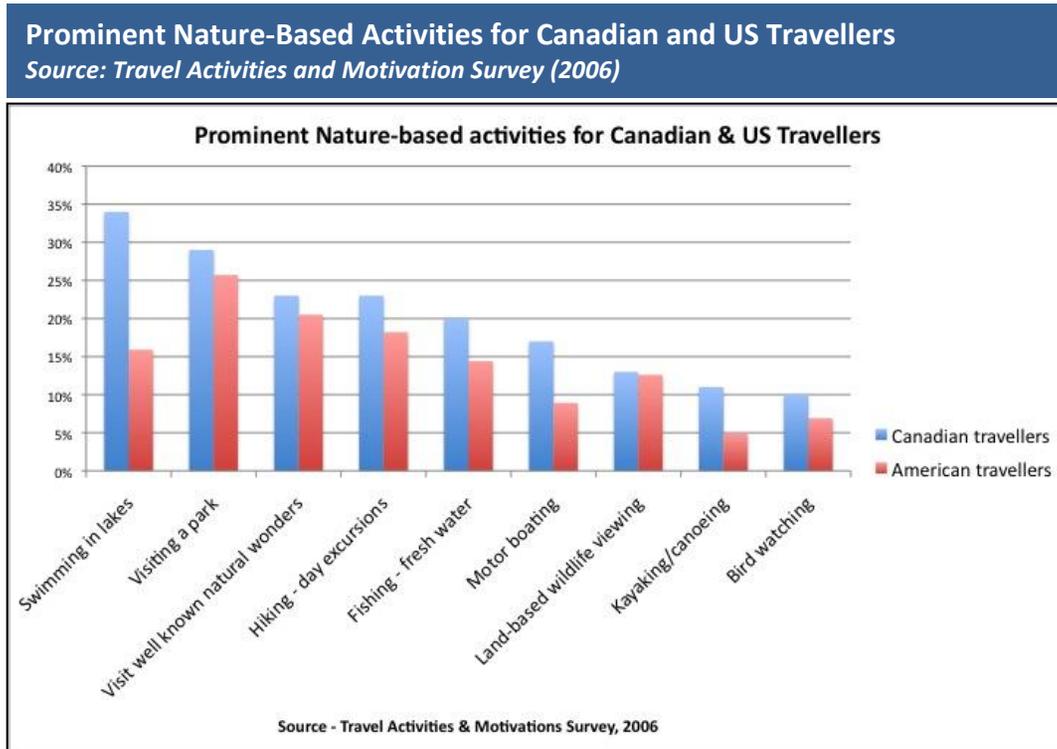
3.6.2 *Aboriginal Culture*

The Canadian Tourism Commission has identified Aboriginal tourism as a significant growth opportunity. In their *Global Tourism Watch* series of research to monitor awareness, travel intentions and other indicators for key markets, visiting parks and protected areas, observing wildlife in their natural habitats and Aboriginal cultural tourism all continue to rank very high for major growth markets like China, Mexico, France and Germany. CTC research suggests Aboriginal cultural tourism may not be a driver in destination selection (as wildlife viewing would be) but can add significant value and it can provide the authentic experience that travellers are increasingly looking for.



3.6.3 Soft Adventure

The Adventure Travel and Tourism Association in association with Xola Consulting and George Washington University completed their regular update on the state of the adventure travel sector (*Adventure Tourism*



Market Report, 2010) and found that 34% of Latin American tourists, 23% of Europeans and 18% of North Americans are looking for soft adventure experiences in their international travels. Adventure tourism is recognized as a major growth market segment with increasing focus on off-the-beaten path destinations where visitors can make meaningful connections with local peoples and have authentic experiences.

3.6.4 Touring

The Huronia area lends itself to the touring markets whether by RV, car, motorcycle or bicycle it is a region with great roads and trails for exploring. With the ageing baby boomer market these are growth markets and each have specific service and infrastructure needs that must be met.

RV Touring: Today's increasingly sophisticated and demanding RV markets are looking for the following facilities and services as they travel:

- Nearby gas stations and RV maintenance services;
- Access to dumping stations or an area designated and approved for emptying gray and black water holding tanks;
- Stores nearby with easy manoeuvrability;
- A range of communication options including telephone connections, wireless high speed internet connections or kiosks and satellite phone service for areas not covered by cell phone;
- Flat campsites with sufficient space for manoeuvring (minimum swing radius of 50 feet for oversize RV's);
- 30 amp service is considered a minimum and some units require 50 amps;
- Pull-through campsites for larger motor homes; and
- There is now a national rating program administered by Campgrounds Camping of Canada – Camping Select www.campingselect.ca

Motorcycle Touring: There are three major motorcycle tourism segments:

- Independent touring - individuals, couples or groups mostly touring for the enjoyment of the experience (some travel to rallies) for half day or day trips or weekend getaways and longer trips.
- Guided tours – usually appeals to those seeking new touring experiences but with insufficient time or resources to research touring options.
- Events and Rallies – gatherings of riders at specified times and locations (i.e. Daytona Bike Week – the largest in the world).

An average distance of travel is between 300 to 400 miles (482-643 km) per day or a maximum of 6 hours. The number one desire of touring riders is outstanding views/scenery, along with roads that offer the excitement of curves and vistas. They are also looking for the following in their touring destinations:

- Gas stations for fuel ups at intervals of at least 2-3 hours;
- Access to maintenance and service;
- Good restaurants and nightlife;
- Accommodations that offer covered parking, air compressors, side stand pads and bike wash areas; and
- Motorcycle specific maps.

Motorcyclists are drawn to businesses and destinations that understand and respect their passion for this activity.

Bicycle Touring: This is an activity that has started to really take off over in Collingwood and the Blue Mountains and in the Beaver Valley areas. Bicycle travellers are typically looking for paved roads or fine cinder paths, restaurant options with nutritious/high protein meals, and accommodation with a safe place to leave bikes, floor access to registration and rooms and washing facilities.

Research on the cycle touring market for the Alberta government has determined that the typical characteristics of the cycle tourism market are as follows:

- Professional, middle ranking and senior white collar workers, with above average incomes;
- More likely to live alone or with another person;
- Primarily age 30-55 – the average is increasing;
- Their most popular interests in declining order of frequency include eating out, canoeing, camping, hiking, theatre, shopping, museums/historic sites, water sports/swimming/beaches;
- They use all types of accommodation from camping to 5 star hotels – but B&B/Inns and campgrounds are the preference for multi-day trips; and
- The average length of stay for short trips is 2 nights and for longer trips 7 nights.

Quebec is the leading model for bicycle tourism in Canada. In August of this year Quebec inaugurated ‘La Route Verte’ a 4,000 km connected biking network linking 16 regions and 320 municipalities, and running across the province. The route makes use of:

- Multi-use paths (often with hikers/walkers) – comprising the largest portion of the trail.
- Designated roadways (lighter traffic) officially recognized and signed.
- Paved shoulder with signage (at least 1 m wide).

The route is lined with public washrooms and resting areas and there is a certification program, ‘Bienvenue Cyclists’ that certifies accommodations and campgrounds that meet the facility (i.e. bike storage, pump and tools for minor repairs) and nutritional needs of cyclists.

Snowmobile Touring: New participants are being attracted to snowmobile touring as a result of technological improvements with snowmobiles. These people often take several overnight trips and are willing to travel great distances. These new participants include more women, couples and seniors, corporate executives, long distance tour riders, first time riders looking for a different winter trip, tourists from other North American areas and tourists from Europe and Asia. Today’s snowmobiler likes to tour, has a reliable, technologically advanced snowmobile and enjoys socialising as a large part of the overall experience. The big issue for Huronia in pursuing this market will be consistency of snow cover in an increasingly volatile snow season.

Through the efforts of Diverse Rentals in Penetanguishene there is some packaging in place to attract these markets.

3.6.5 Boating & cruising

Based on our past work in the North Channel the marine tourism experience for boaters is typically comprised of three integrated components as follows:

- Cruising and sailing venues – the water-based natural heritage features;
- Boating support and services – the man-made infrastructure including transient docking or mooring, marine services, boater services, aids to navigation etc;
- Shore-based amenities and attractions – the natural and cultural heritage features indigenous to the region.

Huronia is a strategic staging point for boating in the world famous 30,000 islands of Georgian Bay, North Channel, and at the entrance or exit to the Trent Severn Waterway.

The second facet to these markets associated with Georgian Bay is lakes cruising. Great Lakes cruise shipping is on the cusp of significant growth according to the Great Lakes Cruising Coalition with some 6,000 berths currently booked for the Great Lakes for 2014, and yet Midland/Penetanguishene are not on the itineraries as they have not yet expressed interest.

3.6.6 Visiting Friends and Relatives

Although they may not be considered tourists, cottagers, or seasonal residents are technically considered tourists, as are the boaters docking their boats seasonally in the 4,000 slips in the area. There is a large built in market of cottagers in the Huronia area providing at least three opportunities – demand for bad weather attractions and activities, a market for local foods, and their associated VFR market. VFR is an industry acronym for visiting friends and relatives.

With a permanent population of 45,000 and a large seasonal population of cottagers and boaters there is significant potential for VFR tourism in the Huronia area.

3.6.7 New Canadians

There is a large and growing new immigrant travel market in Canada, primarily found in the large urban areas like Toronto. A number of the major attractions within or adjacent Huronia are targeting this market including for example Georgian Bay Islands National Park, Ontario Parks (Awenda) and the Huronia Historical Parks.

Although there is a significant diversity of immigrant origin countries the largest populations to focus on for travel in Canada would be Chinese, Indian and Filipino markets in the GTA. Motivations for travel with these markets focus around family and children and strengthening family ties.

This market has a tendency towards urban experiences and will need stimulation to travel to more rural and wilderness destinations and participate in activities like camping, but that is already beginning to happen for Huronia. The target population within this market is younger couples and families (under 45 yrs) who are well educated, more affluent, and have been in Canada for some time.

3.6.8 Sport Tourism

The Canadian Sports Tourism Alliance defines sports tourism as “any activity in which people are attracted to a particular location as a sport event participant, an event spectator, or to attend sport attractions or business meetings.” This is an existing market for Wasaga Beach in a small way with summer skating and hockey camps and this segment may offer some future growth potential.

Size of Overnight Team Sport Tourism Markets in Canada in 2004/05		
Team sport	Canadian Travellers	% of Total
Ice hockey	1,067,214	5.0%
Beach volleyball	752,617	4.0%
Baseball or softball	622,801	3.0%
Tennis	536,128	3.0%
Soccer	521,388	2.0%
Paintball	173,834	1.0%

Source: Travel Activities and Motivation Survey (2006)

Participants include three major categories:

- Active participants—individuals who engage in sport for the purposes of competition with others, under a set of rules, or to improve their personal sporting performance;
- Volunteers—individuals who volunteer their time and expertise in sport (for example, as a coach, a driver, an official or a fundraiser); and
- Attendees—individuals who attend sporting games or events to observe.

Canadians participate in many sports, but the majority of time, effort and resources are concentrated on a handful of the most popular. Not surprisingly, ice hockey is in a class by itself as the most popular sport in all categories, leading all other sports in Active Participants, Volunteers and Attendees. Four other sports attract significant participation in all three categories – soccer, baseball, basketball and volleyball. While the

majority of time, effort and expenditures on sports are local in nature, sports and travel have an important relationship.

The market for sports events may be segregated by:

- The nature of the event activity – single or multi sport;
- The geographic focus of the event – local, regional, provincial, national or international;
- Invitational events – events that are open to a (usually) limited number of participants that meet specific event criteria (performance standards, league standing, win-loss record);
- Created events – an increasingly common form of event, often created specifically to generate tourist activity during shoulder of off-peak seasons, or to enhance the impact and appeal of an anchor event;
- Professional sports teams – while most of the attendance for professional sports is from the local or day-trip market, they do generate economic activity from visiting teams and from post-season play; and
- Competitive versus non-competitive events (e.g. coaching clinics).

Religious pilgrimages, meetings and conference business and sport specific markets like cross country skiing and golf are some of the other important market opportunities for the Huronia area but they do not hold the same potential for region wide development. This is not to say they are any less important and relevant market-based product development and marketing initiatives from these sectors also deserve support.

3.7 Capacity For Future Tourism

3.7.1 Overnight Person Visits

The estimates of person visits to the study area in 2010 (Section 3.3, above) were derived from a methodology developed by the consultants based on estimated overnight stays at commercial accommodation -- roofed such as hotels, motels, bed & breakfast, commercial cottages, etc., and commercial campgrounds. The inventory of commercial accommodation compiled by the consultants identified a total of 524 roofed accommodation rooms available for 365 days per year and 976 campsites available for 150 days per year. Combined, this represents 338,000 nights of available commercial accommodation.

If current overall commercial occupancy were 60%, then approximately 135,200 nights would be unoccupied and theoretically available for new visitors. Overall occupancy exceeding 90% is rare if not impossible. As a result, the effective number of unoccupied accommodation nights available for new visitors is likely to be closer to 101,400. Based on the current Simcoe County average party size of 3.3 persons, and average length

Current capacity for new overnight visitors

150,000 – 155,000

of overnight stays of 2.5 nights, approximately 133,800 additional overnight person visits could be accommodated in commercial accommodation within the study area.

In addition to the commercial accommodation inventory, the study area is home to a large number of boat slips at marinas on Georgian Bay – in fact, approximately 3,977 based on the inventory compiled by the consultants. At least some of these slips – currently unoccupied transient slips – are available for use by new overnight visitors to the study area, although a reliable estimate of this number is virtually impossible to derive given current information.

Another source of unused capacity for overnight visitors is private homes and cottages that might welcome visiting friends and relatives if they are not currently doing so. It is impossible based on currently available information to estimate how many new person visits might be accommodated this way.

Allowing that at least some transient marina slips as well as private homes and cottages are able to accommodate new overnight or longer stays by visitors to the study area, a conservative guess might be 15,000-20,000 person visits. Combining this with the estimated unused capacity in commercial accommodation of approximately 133,800 person visits, it is reasonable to conclude that capacity for new overnight visitors is likely between 148,800 and 153,800 person visits.

3.7.2 Same Day Person Visits

Many factors determine the study area's capacity for growth in same day visitors including unused capacity at attractions, festivals and events, dining and retail outlets. As none of this information is currently available, a reliable estimate of potential new same day visitors that could be welcomed to the study area is not possible.

3.8 Benchmarking Case Studies

Successful small town destinations provide visitors with a combination of authentic experiences, drawing on the local culture and history, and showcasing the natural scenery and historic architecture of the destination. It is the combination of a variety of experiences that creates 'critical mass' in terms of a destination's ability to attract visitation: Particularly if the destination is relatively far from large urban markets, it must provide a sufficient variety of experiences to attract visitors willing to drive several hours and spend a day there, or preferably stay overnight. The authenticity of the experience relies heavily on how the local stories are told and the destination marketing efforts that effectively communicate the local history, culture, and geography to potential visitors.

According to a report from the Illinois Institute for Rural Affairs (*Small Town Tourism: Building the Dreams*) visitors to small towns look for authentic experiences in a variety of categories:

- **Art** can be a dominant tourism attraction, and can take a wide variety of forms. Municipal initiatives to stimulate the development of a local arts culture could include public murals, funding for street performers, and where possible theatre development. BIAs should actively court galleries, glassblowers, sculptors and photographers.
- **Scenery:** While many small towns are blessed with attractive natural scenery, successful communities actively promote them, facilitate public access, and link them to other public open spaces like parks. The natural scenery where possible should provide the backdrop for several festivals and/or events. Where possible, public trails should facilitate access to natural scenery.
- **History:** Successful small towns capitalize on their architectural history through educational plaques, guided and self-guided tours, and where possible links to a local museum. The town's unique architecture and historic buildings should be prominently featured in marketing materials. Local history can also become an attraction by way of antiques stores.
- **Shops and Sales:** Encouraging an appropriate mix of basic goods and services, and more niche tourist commercial, creates a vibrant downtown core frequented by both local residents and visitors. The attraction of the strip to local residents is important to sustain businesses during periods of low visitation.
- **Events and festivals** encourage potential visitors to 'visit now' rather than later. Events should showcase one or more aspects of the town's character including its scenery, history, and broader culture. In agricultural communities, this can include farmers markets and agricultural events like tractor pulls.
- **Ethnic Attractions:** Many small towns have a historic and/or contemporary concentration of ethnic communities. Examples include Mennonites in and around St. Jacob's, and (historically) the Scots in Fergus, Ontario. Showcasing the history and culture of these communities can function as a significant draw for tourists.

While a variety of experiences is important, the key to creating a successful small town destination is to ensure that these experiences are effectively bundled under the umbrella of one or two key themes. Niagara region for example is known for its wine, however in recent years its marketing efforts have increasingly expanded to include more agricultural experiences that offer a combination of natural scenery and high dining. These new experiences are bundled within the region's existing character of an agricultural community. Collaborative marketing efforts between businesses, business associations (e.g. Chamber of Commerce, BIA), and municipal offices, should reinforce these themes to ensure that visitors are not confused by conflicting messaging.

In addition to bundling different varieties of experiences, small town tourism can capitalize on the patchwork of towns, villages and settlement areas in the surrounding area to bundle geographically proximate experiences. This can be particularly useful to help destinations develop a broader range of

experiences for potential visitors that extend outside of downtown shopping. The Town of Creemore for example, has been particularly successful in complimenting experiences in their downtown core (shops and sales, festivals and events, history, and art), with attractions in the surrounding villages and hamlets that emphasize the area’s natural scenery.

Successful small towns that are analogous to those in Huronia use a variety of tourism development strategies. These include showcasing historic downtowns or prominent cultural or heritage assets, and natural/environmental assets. Examples of small towns that have pursued these strategies successfully include Creemore, Elora, and Gravenhurst in Ontario. These towns are characterized by a historic downtown shopping district with a variety of specialty retail stores with tourist appeal. It is this retail mix in an attractive setting - both natural scenery and historic architecture – that provides a unique experience that attracts tourists.

3.8.1 *Creemore and Elora Case Study*

The town of Creemore has many of the natural assets that are often found in successful small town tourist destinations. It has a historic downtown core with architecturally interesting storefronts and a variety of historical attractions, complemented by the nearby Mad and Noisy Rivers, and the hills of the Niagara Escarpment. The success of Creemore as a small town tourist destination is attributable to its strong BIA that has effectively bundled and marketed the variety of attractions it has to offer in its downtown core and surrounding settlement areas as one united destination. The town’s marketing materials sell these attractions as one destination rather than a fragmented patchwork of rural villages and settlement areas.

Specific themes that Creemore draws on to market itself include:

- **History:** A historic commercial main street, historic houses (a self-guided tour facilitated through a \$2 donation for a 10-page booklet at the local bookstore and art gallery), and a historic jail building, which has been restored.
- **Arts and Culture:** The main street hosts six galleries, a bookstore, a brewery, and a pottery store.
- **Scenery:** Promotional materials highlight the two local rivers, the Carruthers Conservation Area, and the hills of the Niagara escarpment. Nearby settlement areas Dunedin and Glen Huron are also included in this marketing program, expanding the variety of experiences for potential visitors and working in partnership (rather than competing with) surrounding communities for tourists.
- **Events and Festivals:** The town hosts a year-round calendar of events including a farmers market, Canada Day Celebration, Dairy Day, Children’s Festival, Copper Kettle Festival, Halloween Celebration, ‘Christmas in the Valley’ (Christmas shopping period), Santa Claus Parade, and ‘Big Heart Days’ (Valentines Day shopping period). These are clearly advertised on the town’s tourism website.

Historic Village Outdoor Theatre Case Study

Trinity is a small rural town with a rich history in fishing, lumbering, shipbuilding and coopering situated on the Bonavista Peninsula about 3 hrs drive from St Johns. In addition to whale watching, kayaking and hiking Trinity is renowned for its live theatre and history.

At the heart of the cultural program is the New Founde Lande Trinity Pageant an outdoor theatre experience that takes places throughout the community out of doors and in historic buildings. Since its first year in 1993 Rising Tides Theatre’s Trinity Pageant has welcomed over 200,000 visitors.

The BIA's development of a centralized, attractive, and easy-to navigate website has been instrumental in effectively marketing the town and its surrounding attractions (www.experiencecreemore.com).

Similar to Creemore, Elora is advantageously located on a river (the Grand), with a historic commercial downtown core. The local BIA draws on these assets to market the town and its surrounding attractions as a rural one-stop-shop with historic buildings, natural scenery, restaurants and stores, a year-round calendar of festivals and events, and local art. Its centralized website also brings together geographically disparate attractions under one umbrella, including the Elora Gorge Conservation Area, the Grand River, and stores and studios in the nearby town of Fergus.

Key to the town's success as a tourism destination has been its strong BIA and the support of the town council. The BIA has invested in a variety of initiatives to better market the town including the website <http://elora.info>, and have spearheaded the transformation of a former gas station on the main street into a public park featuring local art. Town council helped to support this project financially.

3.8.2 Municipal Initiatives to Encourage Small Town Commercial Districts

Municipalities have an important role to play in facilitating small town tourism. Their involvement can span multiple roles including organization and facilitation, funding, promotion, and liaising with regional, provincial and federal governments. Examples of specific initiatives include:

Community Improvement Programs (CIPs): Municipalities can engage in community improvement planning under Section 28 of the Ontario Planning Act. CIPs are a flexible tool to address a wide range of building and land issues through a variety of grants, low interest loans, and/or tax assistance to property owners. Examples of grant programs include:

- Façade improvement,
- Downtown and waterfront revitalization,
- Brownfields environmental assessment, remediation and redevelopment,
- Preservation and adaptive reuse of heritage and industrial buildings,
- Property tax for remediation purposes; and
- Project feasibility studies.

Through the CIP the improvement of the structural and aesthetic integrity of a tourism area can be facilitated and encouraged.

Heritage Tax Rebate Program: Heritage buildings can provide the backdrop for an attractive downtown commercial district with tourist appeal. Due to their age, these buildings may have higher maintenance requirements and be less attractive to potential business owners and tenants. A heritage tax rebate program

provides a maximum of a 40% property tax rebate on identified heritage portions of a property. The program is offered by the municipality in accordance with the Municipal Act (2001).

Business Improvement Areas (BIAs): A business improvement area is a geographic area in a municipality, with a board of management set up to provide business promotion and improvement functions. A BIA allows local business and property owners to organize, finance, and carry out physical improvement and promote economic development in their district. Strong BIAs can enact significant change to downtown retail districts: The Town of Elora's BIA spearheaded the transformation of a disused gas station in the downtown retail district into a new community park. The role of the municipality is to, where necessary, encourage the development of a BIA, and provide on-going support.

Communities in Bloom: Communities in Bloom is a non-profit organization that promotes community beautification and civic participation. Municipalities can apply to take part in Communities in Bloom, and work with their BIA, Chamber of Commerce, and other community organizations to promote the beautification of public and private spaces through planting.

Business Retention and Expansion (BR&E) Studies: BR&E studies allow municipalities to assess identify issues in the local business environment, and help existing businesses to expand by identifying and providing required resources (support, networking, funding etc.). Facilitating a successful business environment has the potential to increase the number and variety of local businesses, and accordingly support the development of a commercial retail district that could attract visitation. The value of a BR&E exercise in terms of its ability to facilitate commercial development that encourages tourism is in the actions taken by the municipality once the study has been completed to create a business-friendly environment.

Streetscape Plan: This provides direction for improvements to the streetscape of an area. The goal of a streetscape plan is to provide design guidelines that create a tourism area with a more unified and attractive character. Examples include widened sidewalks, street furniture, and public art.

Marketing: A key role for municipalities to play in the development of small town tourism is that of marketing and promotion. Examples of municipal initiatives to create and promote a cohesive destination brand include a designated tourism website, development and publication of 'discovery guides', active participation and collaboration with the appropriate Regional Tourism Organization and other regional tourism bodies, and undertaking cultural and tourism planning exercises.



4. **Implementation Strategy**

4.1 **Hurononia Area Tourism Development Coordination**

The traditional approach in a regional destination historically would be to set up a Destination Marketing Organization (DMO), as exists in other adjacent areas like Ontario’s Lake Country, Muskoka, Georgian Bay Country and the Georgian Triangle. However many of these regional organizations struggle to survive financially, and many focus more on marketing than destination development. In the case of Huronia, an area with extensive tourism experience, numerous sophisticated players already marketing the region, and a relatively well-developed tourism sector, a more creative, cost effective and collaborative strategic approach was felt to be required. Following an extensive strategic planning and industry consultation process the recommended approach can be summarized as follows:

to build on the existing strengths and assets, and the existing organization structures the Huronia area will focus on destination development, and providing coordination assistance with the planning, developing and marketing of the region as a year-round destination.

The main objective in the short term (2015-2017) will be to set up an expanded Huronia Area Tourism Steering Committee to begin coordinated destination development and management throughout the area.

Implementation Plan	
Target Date	Required Action
March/April 2014	The four are Municipal Councils are presented the final report and accept the report direct/authorise the existing Steering Committee to implement the Action Plan as detailed for 2015 - 2017
May 2014	The current Steering Committee to recruit representatives from the area tourism industry and other stakeholders for their assistance and expertise with the Tourism Action Plan
June – September 2014	Steering Committee to: <ul style="list-style-type: none"> • Develop a Business Plan to implement the Tourism Action Plan 2015 – 2017 • Research funding sources for the Tourism Action Plan 2015 – 2017 • Consider various methods and resources that will provide for the human resources required to implement the Tourism Action Plan 2015 – 2017 • Provide a report to the four Councils as an update on the above noted actions
Source: <i>the Tourism Company, 2014</i>	

The four municipalities are taking the initial step as the catalysts to initiate implementation of the Action Plan, subsequently engaging the private sector in a joint leadership role going forward.

In the longer term (beyond 2017), subject to the necessary resources being available, the intent will be to develop a more formal joint private/public sector governance to oversee a Tourism Office whose purposes is to assist in implementing the annual project priorities. The following table summarizes the key steps through September 2014 to initiate implementation of the Action Plan.

4.2 Guiding Principles

A visioning session was held in early December facilitated by the consultants with a select group of industry stakeholders. Coming out of that session was a guiding vision for Huronia *to develop and grow the Huronia Area tourism industry while adhering to the following guiding principles:*

Collaboration: Facilitate and enable full collaboration among all Huronia Area tourism stakeholders in the private, public, non-government organization (NGO) and not-for-profit sectors.

Soft boundaries: Expand the boundaries of the Huronia Area beyond the core communities of Midland, Penetanguishene, Tay Township, and Tiny Township, to offer visitor experiences that encompass complementary and strategically important venues, facilities and services located in adjacent areas. Examples would include Georgian Bay Islands National Park, the Beausoleil First Nations islands and the public beaches at Wasaga.

Geotourism: Develop, support and promote visitor experiences based on the concept of geotourism. Geotourism, a term coined by National Geographic traveller refers to tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents. Geotourism incorporates the concept of sustainable tourism ensuring that destinations remain unspoiled for future generations, where tourism revenue contributes to conservation of the natural heritage resources and local culture and history, together the distinctive assets of a place.

Yield over numbers: Pursue first opportunities to increase the amount visitors spend in the Huronia Area, then opportunities to attract more visitors. The focus should be on visitor yield rather than simply numbers.

Accountability: Measuring, reporting and modifying products and visitor experience to achieve economic benefits. Making sure that all actions are measured and there is accountability for the resources used.

Year Round: Seek to offer visitor experiences at all times of the year.

Social benefits: Integrate tourism industry activities into the social fabric of the Huronia Area, engaging community members of all cultures and ages.

Guiding Principles

Collaboration
Soft boundaries
Geotourism
Yield
Accountable actions
Year round
Social & environmental benefits

Environmental benefits: Safeguard the Huronia Area's natural heritage through visitor experiences that do no harm, and where possible, and contribute to the rejuvenation of damaged resources.

Avoid duplication: Work with existing initiatives and organizations and build on their efforts. Examples would include the municipal efforts in wayfinding signage and active transportation, regional trails initiatives, and existing area and regional marketing organizations.

4.3 Action Plan for Year 1-3

The following tables present a summary of the annual projects to be completed in each of the first three years of Strategy implementation.

The Steering Committee will coordinate the actions as required by referring to such reports as the HEA Strategic Action Plan, the Simcoe County Cultural Plan, the Simcoe County Trails Strategy and other pertinent reports and documents as applicable. In collaboration the four municipalities will identify and nominate four or five prominent and representative private sector players under key industry sector categories, and if possible representative across all four political areas.

Priority levels for each action have been identified based on the existing tourism foundation, ease of delivery, anticipated momentum and available resources. The priority levels are:

- A = High Priority
- B = Medium Priority
- C = Low Priority

The Steering Committee may facilitate sub-committees to develop specific details regarding each recommended actions by recruiting knowledgeable resource people from the tourism industry and other stakeholders



4.3.1 Year 1 – 2015

The following are the recommended priority implementation projects for the first year 2015.

Priority Implementation Projects for 2015		
Priority Level	Recommended Actions	Strategic Priorities
A	Area Internet Presence	Marketing and Promotions
A	Branding Program	Marketing and Promotions
A	Coordination of VIC Services	Marketing and Promotions
B	Culinary Tourism	Building Market Ready Experience
B	Initial Training Programs	Capacity Building
B	Liaison Roles	Capacity Building
B	New Regional Map and Visitor Guidebook	Marketing and Promotions
C	Annual Tourism Summit	Capacity Building
C	Database Development	Capacity Building
<i>Source: the Tourism Company, 2014</i>		

4.3.2 Year 2 – 2016

The following are the recommended priority implementation projects for years 2. Depending how quickly the year 1 tasks are implemented some of these projects could be moved forward into year 1.

Priority Implementation Projects for 2016		
Priority Level	Recommended Actions	Strategic Priorities
A	Cultural Tourism	Building Market Ready Experience
A	Select Tourism Special Events	Building Market Ready Experience
A	Special Events Area Calendar	Marketing and Promotions
A	Trails and Cycling Tourism	Building Market Ready Experience
B	Destination Development Effectiveness Monitoring	Capacity Building
B	Expand Training Programs	Capacity Building
C	Accountability Program	Capacity Building
C	Local Awareness Campaign	Marketing and Promotions
<i>Source: the Tourism Company, 2014</i>		

4.3.3 Year 3 – 2017

The following are the recommended priority implementation projects for years 3. Depending how quickly the year 2 tasks are implemented some of these projects could be moved forward into year 2.

Priority Implementation Projects for 2017		
Priority Level	Recommended Actions	Strategic Priorities
A	Business Plan for 2018 Implementation	Human and Financial Resource
A	Funding and Staffing for 2018 Implementation	Human and Financial Resources
A	Tourism Governance Structure 2018 Implementation	Capacity Building
A	Area Tourism Wayfinding Signage	Marketing and Promoting
A	Package Tours	Marketing and Promoting/Capacity Building
A	Trails and Cycling Signage	Marketing and Promoting
B	Implement TREIM Model	Capacity Building
B	“On The Bay” Experiences	Building Market ready Experience
B	Sports Tourism	Building Market ready Experience
B	Tourism Investment Strategy	Capacity Building
C	Historic Villages Concept	Building Market Ready Experience
C	Industry Market Intelligence Report	Capacity Building
Source: <i>the Tourism Company, 2014</i>		

Resources permitting and assuming success with the first three years in implementing the Action Plan the Tourism Strategy Steering Committee will define the Tourism Board objectives, structure, operational procedures, and job descriptions for Board members, as well as defining the Working Groups required to assist in implementing the strategy going forward. The Committee will also draft a job description for the Tourism Coordinator position and outline the funding approach.

5. *Hurononia Area Tourism Action Plan*

5.1 *Strategic Approach*

The Action Plan

To build on the existing strengths and assets, and the existing organization structures the Hurononia area will focus on destination development and providing coordination assistance with the planning, developing and marketing of the region as a year-round destination.

The strategic approach being adopted by the Hurononia Area is to begin to work incrementally with the pieces of the tourism sector that already exist in the region. The four municipalities have a long history with tourism and have successfully built upon their respective strategic tourism assets in establishing a strong base of tourism attractions and support services. The first goal of the Tourism Action Plan will be to foster collaboration between all four municipalities and all tourism stakeholders. Increased collaboration alone throughout the region should bring significant results.

Many of the critical pieces to establish the region as a year round tourism destination already exist including a major draw card in Georgian Bay, core attractions (like Sainte-Marie-Among-The-Hurons, Discovery Harbour, Wye Marsh, Awenda Provincial Park and Georgian Bay Islands National Park, and Martyrs Shrine to name a few), a reasonable range of accommodation options (but missing high end accommodation and properties that reflect the character of the region), a clear physical region defined by the peninsula, compelling events and festivals (some with potential for a tourism orientation), supporting attractions and services and reasonably good access and connections to and throughout the region (with some deficiencies and weaknesses, particularly in local transportation options). There is a common theme with the existing tourism attractions and services – the unique culture and heritage of Hurononia combined with nature and the outdoor opportunities offered by a peninsula in Georgian Bay.

There are some gaps such as a broader, area wide accommodation base (i.e. within each of the municipalities) with more accommodation reflecting the unique character of the area, but in general the region has the basic prerequisites to develop as a destination already in place.

There already exist major tourism players active in the region including for example:

- Hurononia Historic Parks, Ontario Parks, Skyline Hotels & Resorts, Parkbridge Marinas, Simcoe County Farm Fresh helping to pull together the agritourism sector;
- Tourism Simcoe County, SUMAC tying together some of the cultural attractions, Hurononia Foundation for the Arts, and Simcoe County Trails, along with a wide range of smaller players.

There is a range of organizations responsible for marketing within the region including the core attraction operators, the Southern Georgian Bay Chamber of Commerce, Tourism Simcoe County, RTO 7/BruceGreySimcoe, and the major players listed above. But the area lacks an identity in the marketplace, so there is lack of clear identity and coherence in the marketing.

There is no destination marketing organization pulling the marketing together, other than Tourism Simcoe County, which covers a broader geographic area. There are some very good partnerships between operators marketing and selling targeted experiences, but much more potential still to be capitalized on.

There is a need for better coordination and collaboration between the various organizations in their marketing, but the big gap that has been identified is in the development and management of the tourism sector to help create a unified and compelling destination and build tourism capacity.

5.1.1 Coordination Strategy

The recommended Tourism Strategy for the Huronia Area is to **build on the existing strengths and assets, and the existing organization structures by focussing on destination development and assisting through coordination with planning, developing and marketing the region as a year-round destination.**

Like the Collingwood/Blue Mountain area to the west and Muskoka to the east the Huronia area has long been a popular seasonal destination for urban dwellers from southern Ontario, and has a large and growing seasonal resident and cottager population. The significant boater sector is in many ways just an extension of this cottager market, where their boat is essentially their cottage.

In Collingwood the big draw has been the Niagara Escarpment as a venue for winter sports like skiing. In Muskoka the big draw has been the lakes for summer lake based sports. In Huronia the big draw has been the beaches and Georgian Bay.

As has happened in Collingwood and Muskoka the seasonal resident/cottager population is slowly evolving into a more permanent population, providing an ever-larger base from which to attract the visiting friends and relatives markets and extend into the tourism markets on more of a year round basis. As was identified in the RTO 7 strategic planning work *“This area did not develop first as a tourism destination so much as a home away from home, and the strength of the attachment visitors develop to the place remains foundational to its success.”*

The major catalysts for both Muskoka and Collingwood to develop as true year-round tourism destinations were through the major investment in multi-season resorts. The proposed waterfront development sites in Midland, Penetanguishene, and the Township of Tay could also serve as catalysts. In the meantime the Huronia stakeholders can begin working together with existing strengths and assets to establish Huronia as a desirable destination.

A healthy tourism industry is proven to be a major contributor to broader socio-economic development. An appealing tourism destination based on authentic sense of place (the geotourism concept) has a correlation with the destinations’ residential and business attraction appeal. In this day and age, as many municipalities look to expand their creative class in order to grow their economy, tourism destinations offering an

Key Initiatives
Capacity Building
Tourism database & communication system
Accountability measurement system
Training & tourism awareness
Building Market Ready Experiences
Tourism Events
Tourism Investment
Marketing Support

authentic and unique sense of place and diverse outdoor recreation opportunities like Huronia have a better chance of success. One of the basic premises of Richard Florida's work on the creative class is that talented people are very mobile and are looking for interesting and authentic places to live where they can combine their profession with their lifestyle interests and passions. Pursuing the creative class is identified as a major thrust of the Huronia Economic Strategy. Developing Huronia into a viable year round tourism destination will assist in strengthening the communities appeal to full time residents, new businesses and will help to grow the creative class.

Developing the Huronia area as a compelling tourism destination will require a receptive local community, both with seasonal and permanent residents. Locals have to begin to understand their role as ambassadors and hosts for tourism and the destination messaging must be sent with conviction and pride.

5.2 Area Coordination and Leadership

Working with available resources it is recommended that the four municipalities take the lead for the first few years with Strategy implementation. The existing Huronia Area Tourism Steering Committee can reach out to the private sector to expand membership to begin implementing the initial three-year action plan.

Over the long term (after 2017) it is recommended that the four municipalities, with the support of the private sector, establish a tourism coordination and leadership office in conjunction with the Huronia Economic Development Corporation to:

- assist in expanding tourism capacity in the region;
- facilitate collaboration among all stakeholders;
- develop the Huronia area as a compelling tourism destination; and
- assist in coordinating marketing activities.

This office would have ongoing responsibility for maintaining an industry database, setting up and running an ongoing communication and industry engagement system and implementing an accountability/research program. Beyond these ongoing tasks their responsibilities would be focussed on defining and implementing annual projects.

Building on the existing strengths and assets, and the existing organization structures, the first step in establishing this office will be to build an appropriate governance structure with the mandate to oversee implementation of the Huronia Area Tourism Action Plan. It is recommended that a joint private/public tourism governance structure be set up to fulfil this role. This structure could be comprised as follows:

- 4 elected official positions, with one from each of the four municipalities;
- 4 staff support who are ex officio, non-voting members (from each of the municipalities);

- 5 industry members with representation across the area with representation from the accommodation, attractions, events and marina sectors along with the Chamber of Commerce (who in turn represent a broad cross section of industry stakeholders).

The mandate of the tourism office would be to prepare business plans for implementing the Tourism Action Plan, with annual detailed work plans that would be reviewed and approved by the Board at the beginning of each year. The general responsibilities of the Tourism office should include the following:

- Maintaining a database and setting up a communication system with all stakeholders and in all sectors of the area tourism industry (private operators, non-government organizations and relevant not-for-profits);
- Liaison with RTO 7 and Tourism Simcoe County;
- Facilitating creation of new targeted tourism experiences and packages;
- Development of an event calendar and liaising with event organizers to maximize the tourism opportunities;
- Developing a system for collecting and disseminating tourism data;
- Developing a system for disseminating relevant market intelligence;
- Tracking results and progress and reporting back to the Tourism Board;
- Coordinate visitor services to ensure consistency;
- Working with the community tourism and/or event staff;
- Initiating and coordinating relevant tourism and hospitality training programs as required;
- Providing support and coordination to those involved in marketing the region;
- Assisting with specific, well defined tourism projects on an annual basis.

Members of the tourism governance structure would monitor progress being made on implementing the Tourism Action Plan.

5.3 Capacity Building

Capacity building refers to the collective effort made to enable the four municipalities and the tourism stakeholders in each (and those outside in the soft boundary areas) to begin to develop Huronia as a year round tourism destination. The Tourism Coordinator would act as the facilitator and coordinator of tourism industry capacity building projects. Recommended projects are outlined below.

5.3.1 Huronia Tourism Database and Communication System

The consultants compiled the most current database of tourism operators in Huronia. This database will need to be expanded to include the soft boundary areas, including the lower end of the 30,000-island archipelago, the public beaches at Wasaga, and the islands of the Beausoleil First Nation. This database

needs to be updated every year to ensure it is accurate and current. The database should be expanded with a call for interest in providing support services for the regional tourism initiative including for example:

- NGO's and not-for-profits involved in tourism;
- Individuals with foreign language capabilities;
- Interpreters – language and heritage;
- Educators;
- Suppliers and partners (i.e. ClicktoStart.com, Georgian College, Georgian Bay Trails, Georgian Bay Coastal Route, Simcoe Farm Fresh, Huronia Foundation for the Arts)
- Volunteers.

With the database of stakeholders in place a communication plan will need to be set up by the Coordinator. One suggestion for this system was to use the Simcoe County YLM ('Your Local Marketplace') inventory system as the basis for the communication system. This option and others needs to be evaluated to determine the most practical and efficient system to adopt. Whatever solution is utilized the system needs to enable regular communication with email, messaging, e-newsletters, surveys and document transfer between the Coordinator and all tourism stakeholders, or sectors of the Huronia area tourism industry.

5.3.2 Accountability/Performance Measurement System

There are three components to the recommended accountability program:

- Collection of regular visitor statistics from attractions, events and accommodation operators;
- Destination development effectiveness monitoring for experience/product development, capacity building, tourism event development and marketing projects; and
- Reporting back to the industry – Industry Market Intelligence Reports.

Collecting Visitor Statistics

There is a need to begin working with the area operators to develop and implement a visitor-tracking program to generate timely, relevant data for tourism planning and marketing decisions. The lack of useful data specific to the Huronia area is a hurdle to development as a viable destination.

Any successful destination planning, product development, and/or marketing initiative needs market intelligence to:

- Create recognized benchmarks;
- Provide means to accurately compare performance;
- Capture valuable information about which tactics are effective;
- Aid in decision-making process when allocating budgets;

- Aid in decision making when developing campaigns;
- Identify “need areas” for product development, training, education; and
- Provide a platform to articulate tourism’s contribution to the local economies.

Individual operators throughout the region also benefit from market intelligence for the region to assist in their business planning and longer term strategic planning. An ongoing program for collecting visitor statistics should use standard templates for:

- Accommodation operators including B&B’s; and
- Key attraction and event operators.

Key characteristics of the program should include:

- Data collection templates that are simple and easy to use;
- Templates distributed and collected monthly during June, July, August, September and every other month thereafter; also during events with reporting immediately thereafter;
- Data collection from:
 - Visitor information centres (note this data is not necessarily representative of all visitation to the area but can provide useful qualitative insight).
 - Accommodation properties including hotels, motels, Inns, B&B’s, cottage/cabin resorts, resorts, campgrounds
 - Attractions
 - Events with a tourism component
- Distribution of templates to accommodation operators (the incentive for operators to participate will be the consolidated results report that is emailed back to all participants); email reminder to establishments to send info via email (or telephone info) at the end of each month;
- Collection of the following types of data:
 - Number of visitors/arrivals /overnight guests;
 - Guest origin (by approximate or accurate proportion)
 - Average length of stay

Once a year it is recommended that the Tourism Coordinator design and implement an exit survey to assess visitor satisfaction and activities while in the region. This should be a one page (maximum) survey distributed through tourism operators or by students at strategic locations. Data collected through this type of survey should include:

- Demographics: Origin age, party composition;
- Visitor Satisfaction: with accommodations, meals/cuisine, rate satisfaction levels (Likert scale 1-5) and list two trip highlights;

- Activity/Experience Participation: which attractions, activities/experiences participated (circle from a regional list of key attractions, activities, festivals, events and satisfaction levels with experiences participated in. List two trip highlights; and
- Other possible questions (space permitting) on their overall impressions of their visit.

Once there is solid annual visitation data the provincial TREIM economic impact model can be utilized to quantify the economic benefits of the tourism efforts.

Destination Development Effectiveness Monitoring

Regular reports should be maintained on the progress with all experience development initiatives, tourism event development initiatives, capacity building initiatives and marketing projects. These regular reports would serve as part of the regular updates required by the Board.

Industry Market Intelligence Report

This is the consolidation of industry statistics collected and other useful market insights that are disseminated to operators bi-monthly. Essentially a newsletter but positioned as a “must read”. There may also be a monthly newsletter that includes other material of interest to operators but not including the research, which only need be sent out bi-monthly. All tourism stakeholders in Huronia should be on the distribution list.

The information should be compiled, and summarized directly from the sources identified below. This approach puts all information into one document, relevant to all operators, providing a useful tool for their own business and strategic planning. Sources should include:

- Huronia visitor statistics collected monthly from accommodation and attraction operators in a consolidated format;
- RTO 7 and Simcoe County Tourism information;
- Useful provincial data or report summaries;
- Upcoming events, conferences, tours etc., and
- New tourism development initiatives in the region.

5.3.3 *Tourism Training Programs*

The first training program requirement identified during the consultation process is general hospitality training for all front line staff involved in the tourism industry throughout Huronia. This program would best be developed in consultation with RTO7 and Tourism Simcoe County and could potentially involve Georgian College in some fashion, or the Southern Georgian Bay Chamber of Commerce. The ultimate objective

should be to have a basic level of hospitality training provided to all front line staff in the Huronia area, for example the Super Host program administered by the Ontario Tourism Education Council (OTEC).

There is a wealth of useful training and certification programs available to the tourism industry through the Canadian Tourism Human Resource Council and provincially through OTEC. One of the first steps for the Coordinator should be to survey the tourism stakeholders throughout the region for their training needs. Useful insights into available training courses and programs could be included in the Industry Market Intelligence Report noted in the section above.

5.3.4 Making the Case for Tourism

It is critically important that the communities be open, receptive and supportive of tourism. And this is not the case today. One important early task for the Coordinator will be to work on a program in support of 'making the case for tourism' in Huronia that is targeted at local residents and businesses. This has been done in many other communities in many different ways, but the approach that is taken in Huronia will be dependent on resources available. There are many approaches out there that Huronia can borrow ideas from.

Some examples:

- Myrtle Beach in the US has a dedicated website -- <http://www.tourismworksforus.com/>
- BC has produced a handbook for community tourism -- torc.linkbc.ca/torc/downs1/TCTT_Web_b.pdf
- Manitoba have developed a tourism ambassador program -- <http://www.travelmanitoba.com/TI/IndustryToolbox/PlanningAndAssessmentTools/TourismAmbassadorProgram/&node=6294>
- Toronto has a very successful Tourism Ambassador program to help stimulate conference and business travel -- <http://www.seetorontonow.com/MeetingPlanners/beahost.aspx>
- The program in Kansas City helps turn front line staff into Tourism Ambassadors -- <http://www.visitkc.com/members-and-partners/ambassador-program/index.aspx>

5.3.5 Coordinated Visitor Information Services

The term *Visitor Information Services* (VIS) applies to the range of critical information-based services offered by a destination for the benefit of their target markets and visitors. These VIS can play an integral role in the prospective visitor's level of awareness of the destination as well as assist in their selecting, planning and booking the destination. VIS also plays a vital role in supplying the visitor information while in the destination to fill in the gaps. VIS can play a role in the visitor staying longer or spending more, enhancing their experience while in the destination, and/or encouraging them to return at a future date.

The VIS areas that need coordination assistance in Huronia are as follows:

- The product database assembled by the consultants will need to be expanded to include those products in the soft boundary areas that strategically should be included and then every year the database should be updated;
- There is a need for a tourism map for Huronia including the soft boundary areas identifying key points of interest, major attractions, trails, activity locations, waterfront and beach access locations and information centres at a minimum;
- There is need for a Huronia wide distinctive and consistent tourism establishment and wayfinding sign program for all transportation networks including the trail system – this can build on the initiatives already underway in Penetanguishene and Midland;
- The need for a tourism web presence is discussed below.

5.4 Building Market Ready Experiences

The Huronia Area Tourism Coordinator can be at times a catalyst, leader, facilitator and coordinator for visitor experience development projects. The Tourism Summit will provide an opportune time to initiate this process.

To help pull the diverse products and services available within the region together there is a need to get the tourism stakeholders thinking about collaborating to create tourism experiences, packages and collaborative programs. When a tourist plans and books a trip to a destination for leisure purposes, they are looking for and buying an experience comprised of a range of individual products. A package, from a tourism perspective, is the linking of a number of products and services into a single experience, often to be sold for a single price. There is a broad range of products and services that can be linked into a tourism experience, including:

- Food and beverage;
- Accommodation;
- Attractions – i.e. natural, built, heritage;
- Transportation services;
- Programming – i.e. guiding, educational or learning activity;
- Shopping;
- Activities – i.e. hiking, cycling, boating;
- Agritourism;
- Interactive cultural components;
- Arts and culture;
- Time sensitive attractors like events and festivals.

One of the initial tasks for the Coordinator will be to work with the industry to create compelling market driven experiences that respond to existing and new high potential market opportunities. In order to initiate the work on developing market ready experiences the Coordinator will need to begin to pull the different sectors of the industry together. Two possible options would be:

- Initiate a series of experience development and packaging workshops facilitated by an industry expert;
- Creating forums for bringing cross-sectorial operators together in market based or thematic areas to begin to work together in developing experiences, facilitated by the Coordinator, for example:
- Ecotourism;
 - Culture and heritage;
 - Religious and spiritual;
 - Winter;
 - Trails based;
 - Georgian Bay water based.

The idea would be to get the stakeholders together in a room, in a facilitated or teaching environment to begin to creatively work together in creating compelling experiences and packages. The Ministry of Tourism, Culture and Sport provides useful templates for a variety of tourism sectors on their website http://www.mtc.gov.on.ca/en/invest/investment_bus_tools.shtml including for example:

- Market readiness self assessment tool;
- Francophone Tourism Product Development Guide;
- How to Start an Ecotourism Business.

The following were identified as short-term experience development priorities.

- Trail access to and along the Bay;
- On the Bay activities;
- Local product and food movement.

Over the medium to longer term the experience development priorities were identified as:

- A proactive, strategic tourism investment program focusing on lodging and attractions; and
- Historic village development.

5.4.1 The Culinary Tourism Opportunity

Tourists seek a variety of authentic cultural experiences tied to the cultural history of the region. This tourism strategy addresses the broad variety of tourism assets and experiences that exist in the region with

the potential to draw on the local history. A growing trend within small town tourism however that lies outside of the traditional realm of cultural experiences is *culinary tourism*. Eating and other food experiences typically rank highly in studies ranking popular activities among tourists. Tourism research like the TAMS surveys indicate strong interest in dining at restaurants offering local ingredients and recipes (56% of all Canadian overnight travellers in 2004/05) and attending farmers markets, one of the most popular festival and event categories for Canadian overnight travellers (19% of all Canadian overnight travellers in 2004/05). This trend is confirmed by annual data from the Ontario Ministry of Tourism, Culture, and Sport which indicates that for most tourism regions in 2011, visitor spending on food and beverages at restaurants and bars was the largest consumption category among visitors from Ontario – surpassing spending on transport, accommodation, recreation and entertainment, and retail.

With the growing importance of the local and slow food movements there is increasing potential for destinations such as Huronia to highlight their local food offerings. Given the areas location in an agricultural belt, the Huronia communities are well situated to take advantage of this growing trend. This then can become a cornerstone of the area tourism experience.

Specific actions to take to encourage culinary tourism in Huronia include:

- Working with existing food groups (e.g. the Huronia Food Trail - Simcoe County Farm Fresh) to create and strengthen links between local farmers and restaurants. Restaurants should be encouraged to create dishes and menus that showcase seasonal local ingredients – and clearly indicate on the menu the origin of the ingredients. This allows existing restaurants to provide more local character and authentic dining experiences that have significant tourist attraction. This is already beginning to happen with businesses like Maître D', Ciboulet et Cie, Explorers Café, and the outdoor dining experience offered through Eco-Huronie, to name just a few.
- Working with the existing Food Trail group to further develop and promote the full range of agritourism experiences as a part of a 'trail' system that allows visitors to connect-the-dots between the wide variety of businesses, farms, markets, and other experiences. Trail maps/booklets should include details about each attraction/stop, and be regularly updated and expanded.
- Showcase local restaurants and farms with culinary and agricultural festivals like Festival du Loup. As above this should be facilitated in large part through existing food groups with the assistance of the tourism office.
- Take advantage of the resources and insights available through the Ontario Culinary Alliance (<https://ontarioculinary.com/>).

Waterfront dining experiences in Huronia are currently relatively limited. Midland, Penetanguishene, Balm Beach, and Victoria Harbour have some harbour-side dining experiences, however most other Huronia communities do not. The relative dearth of waterside dining experience is primarily a function of large-scale

residential build-out along the shoreline where property prices are highest: Commercial development has largely remained further back from the shoreline. The lack of waterfront dining experiences is potentially detrimental to tourism in Huronia, given that Georgian Bay is a primary asset that attracts visitors to the region, and authentic local food and dining experiences are a priority for a growing number of tourists. Given that much of the shoreline is already developed in Huronia, new waterfront dining experiences must be carefully planned into new shoreline development. Town and Township staff, through the planning process, should ensure that new development on the waterfront includes commercial opportunities that could attract the development of waterfront dining experiences.

5.4.2 *Variety of Accommodation Options*

Overnight visitors spend more on average than their same-day counterparts. Encouraging overnight visitation requires both a variety of experiences that will entertain them for longer than a day, and a variety of accommodation options that are of sufficient quality and conveniently located. Options should provide a variety of price points to effectively capture the needs of all overnight visitors. Overnight accommodations in Huronia are currently concentrated in Midland: All six of the region's hotels are located in the town. Bed and breakfasts are scattered throughout the region but are again more concentrated in the larger community of Midland.

Municipalities have a key role to play in encouraging the development of accommodation options. The development of bed and breakfasts can be facilitated by reviewing zoning bylaws that require potential operators to pay for costly rezoning processes. Once developed, these businesses can be more effectively supported through the development of a Bed and Breakfast Association – a membership based organization that encourages bed and breakfasts to work together to advocate on their behalf, and create more cohesive marketing and booking methods. The association operating over in the Collingwood area is a good example: (<http://www.bbcanada.com/associations/cabba/>).

Encouraging hotel development is more complex given that the industry is dominated by large multi-national corporations that base their investment decisions on local market conditions. In the shorter-term then, encouraging new hotel development will depend heavily on the region's ability to expand its tourism offerings to become a year-round destination. Consultation with local hoteliers indicated that most have difficulty filling rooms during the winter. Municipalities however should also invest in a hotel market study to build a case to potential investors as to the market potential and economic feasibility of development a hotel in their community. This is of particular importance to the Towns of Penetanguishene and Midland which both hope to encourage hotel development on their waterfronts.

5.4.3 Trail Connections

The Huronia area is rich in trails and trail opportunities. As was identified in the market opportunity section there is significant potential in catering to the wide variety of trail interest groups, and general tourists with an interest in touring or experiencing trails by various means. Trail and touring tourism can cater to year round market interests.

Each of the four municipalities have developed extensive multi-use trail systems as follows, and as published in the Simcoe County Trails booklet:

- The Midland Rotary Waterfront Trail an 8.0 km. paved trail available for non-motorized uses;
- Penetanguishene Trail a 5.5 km. paved trail for non-motorized uses;
- Tay Shore trail a 16.0 km. paved trail available for non-motorized uses;
- Tiny Trail a 23.0 km. crushed stone/asphalt mixed trail available for non-motorized uses and snowmobile use in designated sections; and
- Route Champlain a 45 km. trail linking the previous four trails available for non-motorized uses.

There are also trails available in both the Tiny and Wye Marshes and within Awenda Provincial Park. The Martyrs Shrine is working on a pilgrimage route and trail tying in the satellite sites of St Ignace and St Louis. The small craft inside and outside routes up through the 30,000 islands chain are existing water-based trails originating from the Huronia area.

In addition the Georgian Bay Snowriders (snowmobile) Club (<http://gbsr.webs.com/>) groom an extensive system of trails through the Huronia area and the Central Ontario ATV Club (<http://www.coatv.ca>) maintain an ATV trail in the Wildman Forest. Other trail user groups active in the region include the South Simcoe Off Road Routes Association and the Simcoe County Mountain Bike Club.

All of these trails offer significant potential for trail based tourism once they have been packaged into compelling and targeted experiences.

The road system through Huronia also provides significant opportunity for a different type of trail tourism, that of touring by bicycle, motorcycle, RV and automobile. The Georgian Bay Coastal Route runs through the area (<http://www.visitgeorgianbay.ca/>) promoting motorcycle and RV touring and cruising in Georgian Bay along with other activities and attractions. The Ontario By Bike Network (<http://ontariobybike.ca/network>) promotes touring by bicycle throughout Ontario including the Huronia area.

Developing the tourism potential in this extensive trail and touring system provides an opportunity to get the municipalities, not-for-profit groups, relevant local businesses and tourism operators collaborating to create compelling trail based and touring experiences in different seasons for different markets and user groups. The Coordinator can play a role in coordinating and facilitating this work and ensuring the

wayfinding signage, mapping and other visitor information services needs for each market are provided. A few good examples follow:

- <http://www.cyclebnbsouthgeorgianbay.com/> - a cycling and B&B route initiative in the Collingwood and Thornbury area.
- <http://www.applepietrail.ca/> - a themed touring route in the Blue Mountains area.

5.4.4 'On The Bay' Activities

There is tremendous opportunity to develop more opportunity for visitors to get out and enjoy Georgian Bay from the Huronia shores. There are only a few operators catering to this opportunity, including for example the cruise boats and the Diverse Rentals operation at Hindson Marina. The following are a number of ideas for developing further 'On The Bay' activities. One of the Coordinators roles should be to begin proactively working with key stakeholders to pursue these and other options.

- Develop a fast boat connection to take day visitors to Georgian Bay Islands National Park;
- Encourage new outfitters like Swift Canoe and Kayak to develop a presence in Midland or Penetanguishene (they already do run programs for an ESL (English as second language) tour operator on Little Lake in Midland and they do have a base on the other side in Waubaushene);
- Work with Beausoleil First Nation to develop new programs/experiences out and around the islands (beaches, dive sites, lighthouse, fishing), and incorporate their tourism initiatives as they are established and market ready;
- Work with the Balm Beach businesses (and possibly adjacent Wasaga Beach businesses) in developing a shuttle service;
- Contact the Great Lakes Cruise Association to discuss the opportunities for cruise ship visits to Midland and/or Penetanguishene (will require resources for membership and then effort to develop shore programs and experiences to cater to the cruise ships).

5.4.5 Creating Historic Villages with Tourism Appeal

While visitors to small towns are looking for a variety of experiences, it is important that a destination offers a tourist-friendly downtown. The downtown should function as a base from which visitors can then pursue more geographically distant attractions like a food trail or other scenic and recreation activities. A tourist-friendly downtown has a variety of stores, services and restaurants that offer modern conveniences and authentic products in a historic setting. The table following, provides a list of the typical retailers found in major resort communities.

Examples Typical Retailers in Tourist-Friendly Downtowns		
Antiques	Art Galleries	Bakery Products
Bird Houses	Books	Candles
Cards	Cheese	Chocolate/Candy
Christmas Items	Coffee Shop	Crafts
Dolls	Factory Outlets	Flowers
Glass	Outdoor Equipment	Gourmet Foods
Heritage/Ethnic Gifts	Home Accessories	Jewellery
Leather Items	Lifestyle Apparel	Liquor and Wines
Novelty Gifts	Perfumes/Soaps	Pet Supplies
Photography	Pottery	Quilts
Rugs	Skin and Health Care	Theme/Historic Restaurant
Toys	Wreaths	
<i>Source: Sierra Planning & Management, 2014 (Adapted from Ryan, Hoyland, Scheler: Tourism and Retail Development, University of Wisconsin Extension Cooperative)</i>		

Specific actions that encourage the development of tourist-friendly downtowns include:

Development and Support of BIAs: Key to encouraging diversity and quality among retailers in the downtown is the formation of a Business Improvement Area (BIA). A BIA can work with the municipality to develop and promote the area as a tourist destination, and undertake strategic planning to keep the destination contemporary and interesting to visitors. Given that BIAs are driven by business owners, they have a more intimate knowledge of the local market and the needs of business owners than municipal staff. Midland currently has a BIA which has developed initiatives to better position downtown Midland as a tourist-friendly area, including a grant program to improve facades, and working with funding from the Trillium Foundation to restore murals along the strip. Penetanguishene is currently in the beginning stages of developing a BIA and in the interim,, the Town via its Downtown Improvement Committee are providing the services traditionally hosted by formal BIA's, however for the smaller communities of Tay and Tiny Townships it may be more appropriate for business owners to coordinate efforts through the Southern Georgian Bay Chamber of Commerce.

Municipal staff should work where possible with the local BIAs and Chamber of Commerce to outline their goals for the downtown. These should include: façade and design guidelines, sidewalk seating and dining where possible, and the restoration and showcasing of historic buildings.

Accessible, free or low cost parking: Tourists are typically unfamiliar with the area they are visiting. They are also willing to spend money on a variety of experiences at the destination and usually require longer-term (i.e. more than an hour) parking. A lack of accessible parking directly in the downtown has the potential to deter visitors who are unwilling to or unsure about finding alternative parking outside of the core. Moreover, charging for parking – particularly by the hour, deters visitors from spending a significant amount of time in the downtown. This effectively curtails the amount of money they may spend in local businesses.

Municipalities in Huronia have the responsibility to consider reviewing parking charges in the downtown. They also have the responsibility of ensuring that available parking is effectively and clearly signed. If tourist-focused parking is located off of the main downtown strip, the municipality should provide clear signs directing walkers back to the main retail area and other nearby destinations.

Community Improvement Plans: Municipalities can engage in community improvement planning under Section 28 of the Ontario Planning Act. CIPs are a flexible tool to address a wide range of building and land issues through a variety of grants, low interest loans, and/or tax assistance to property owners. Examples of grant programs include:

- Façade improvement,
- Downtown and waterfront revitalization,
- Brownfields environmental assessment, remediation and redevelopment,
- Preservation and adaptive reuse of heritage and industrial buildings,
- Property tax for remediation purposes; and
- Project feasibility studies.

Through the CIP the improvement of the structural and aesthetic integrity of a tourism area can be facilitated and encouraged.

Increasingly cultural activities and facilities such as performing arts centres, museums or art in the built environment are recognized, as strong anchors for mixed-use developments helping to provide identity and prestigious image that money cannot buy. Some of the techniques being used in other jurisdictions to stimulate private sector investment include renovation of old buildings for adaptive reuse, instituting percent for arts programs, implementing tax incentives, building in below market rent for artists, creating special zoning changes and ensuring building codes allow for work/live space for artists.

5.5 Developing Tourism Events

Special events, festivals and major business events can be categorized as attractions, drawing visitors on a short-term basis. Events can often provide a degree of urgency to draw visitors to a destination and also

Tourism Event Case Study

In the 1990's Newfoundland & Labrador created and hosted a series of major commemorative events with a tourism objective. The one that has most relevance to Huronia and the Champlain commemorative being planned was the Vikings! 1000 Years event staged in 2000. From the beginning the event was conceived as a strategic business opportunity to drive awareness in key markets, new tourism visitation to the province, enhance pride for Newfoundlanders and result in tourism legacies. A calendar of events ran from July 2000 through winter 2001 and achieved impressive results including increase visitation and revenues to the province at a time when adjacent provinces were experiencing declines, and significant provincial, national and some international media exposure. The event attracted a significant number of Viking re-enactors from around the world, Viking ships and interested tourists and today the Norstead Viking village continues to operate as the legacy attraction.

have the power to create powerful media attention and exposure. Many jurisdictions are realizing the potential in developing major tourism events around historic milestones like centennials/bicentennials to grow tourism awareness and visitation. Destinations are becoming increasingly sophisticated in the way they strategically use events to grow tourism, extend seasonality in the local tourism industry, and in turn attract and stimulate new private sector investment.

It is recommended that the tourism office begin to work on setting up a tourism event program for Huronia. Tourism events are defined as events that are large, compelling to a target market and with high expenditure potential. Such events should also have a high potential for regional and provincial media exposure and the ability to encourage multi-day visits. To be considered a true tourism event, a material share of total participation must come from overnight tourists/visitors (say minimum of 25%). Festivals and events can be used as strategic assets to create compelling, time-sensitive reasons to travel to Huronia.

The first step will be to help coordinate the existing festivals and events schedule throughout the area to maximize the impact of existing events. But then it is recommended the tourism office set a policy for support of tourism events and festivals i.e. what is the threshold to be considered as a tourism event and in turn receive support from the tourism office.

The following criteria are recommended for consideration in identifying/designating tourism events:

- The estimated economic impact of an event considering number of participants, spectators, support teams and others, their length of stay and their estimated daily expenditure – tourism events must generate a material level of overnight visitation with the primary purpose being travel to the event;
- The role of media and the potential to create awareness of or interest in Huronia as a tourism destination to priority and/or developing markets;
- Event frequency – giving preference to recurring events;
- Ability to secure significant private sector investment to ensure leverage of any public funds;
- Fit within gaps in the Huronia event tourism calendar.

In the meantime it is recommended the tourism office begin to assist (on growing the tourism element through packaging) on a focussed number of strategic events that are recognized to have tourism potential such as:

- First Light by extending the event out to local restaurants and retailers, packaging tickets with accommodation, including Aboriginal programs or events etc.;
- Winter carnival through packaging;
- A marine event encompassing existing and possibly new marine events (could include Tugfest & Tall Ships when in Georgian Bay); and
- Champlain Commemorative and/or other historic events that have tourism potential.

5.6 Tourism Investment Strategy

The four municipalities will need to become more sophisticated and proactive in developing a tourism investment attraction strategy at the regional level. This is beginning to take shape through the efforts of the Huronia Economic Alliance and its regional economic development strategy.

In general private sector investors look at the following attributes when considering a tourism investment:

- The degree to which tourism is recognized as an integral component of the economic base of the region. The local government(s) must be fully supportive of tourism and be able to demonstrate that support by facilitating and where possible incentivizing tourism investment, and assisting in providing the needed infrastructure;
- Quality of tourism attractors and supporting infrastructure (transportation/access, accommodation options, food services and entertainment options) and potential competitiveness and synergies for the planned development;
- Destination marketing expenditure and sophistication in the region as their development will rely on the tourist visitors stimulated by the marketing and they fully recognize that there is a correlation between marketing effectiveness and visitation in a destination.

The following chart excerpted from the report prepared by HLT Advisory and ^{the} Tourism Company illustrates the steps a typical tourism investor goes through in making an investment decision, and the points at which government can influence the decisions.

Investment Process
<p>Prepare</p> <ul style="list-style-type: none"> • Preparation for actively promoting investment opportunities in a given jurisdiction (and even a more passive approach directed at supporting other’s activities) might include: • Documentation of specific product investment needs at the local level. • Analysis and documentation of public sector tourism assets potentially available for private sector involvement (outright sale, partnerships involving capital injections, third-party management). • Review (and amend to the degree possible) legislation affecting the creation and operation of tourism businesses.
<p>Identify</p> <ul style="list-style-type: none"> • A proactive investor targeting approach, given the underlying criteria required in the Identification

stage outlined above, should be limited to:

- Development of a contact database of high-probability investors including sufficient background to gauge interest in individual opportunities.
- Preparation of “teaser” documentation specific to the opportunity and tailored to the investor’s business case requirements.
- Preparation of jurisdiction-wide and geographic market-specific “teaser” documentation addressing key elements of the Identification criteria.

Assess

- Public sector’s role in assisting the investor complete due diligence is primarily focused on provision of information and streamlining approval processes. In particular:
- Preparation of demographic and economic profiles of high-probability markets.
- Preparation of “how to” manuals documenting basic regulatory requirements (e.g., how to register a company, how to effectively tax structure).
- Expediting specific information requests including pre-approvals required to complete due diligence.
- Provide a one-window approach.

Develop & Operate

- Public sector may, although not necessarily should, become much more interventionist at the development and operation level through provision of:
- Development land on preferential economic terms (either freehold or leasehold)
- Financial incentives including loans, grants, or payments tied to performance. These tools are discussed more fully later in this chapter.
- Other concessions such as infrastructure development (road access), support services and marketing.
- Tax deferrals including income and property taxes.

Aftercare

- Once a new investor/operator has been established potential exists for further development opportunities either in the same location or elsewhere in the jurisdiction.

- Continue relationship with investor to facilitate future investments and/or reinvestments.
- Investigate expansion opportunities within jurisdiction by addressing product gaps in non-competitive areas.

Source: Ontario Tourism Investment Attraction Research Study, Feb 2009, HLT Advisory in association with ^{the} Tourism Company

Through their website - <http://www.newzealand.com/> - New Zealand presents a good example as to how the government can leverage the tourism, economic development, live/work and educational sector marketing.

5.7 Marketing Directions

Although this Action Plan does not include a marketing strategy it is important to begin to think strategically about the some of the prerequisite marketing tactics for future growth of tourism in Huronia.

5.7.1 Branding

It has been decided that in the short term the region will work under the Huronia area tourism name and that the brand development process, which will take time, can be initiated when resources are available.

It is important to recognize that a brand is far more than just an ad campaign or a new logo. It must reflect the whole promise being made to visitors. The brand should be the compelling regional story, clearly exhibiting how Huronia is differentiated from other destinations. A brand is the destination's story that differentiates it from other destinations, and it should reside at every touch point the visitor has with, and in, the destination.

The first step will be defining the brand essence, the values being portrayed and the desired personality for the region. It must come from within, and portray the region in a way the local tourism stakeholders fully support, that has resonance in the marketplace with the target markets. Once the brand and its characteristics are defined it can be turned into a creative concept for marketing purposes and then tested in the market.

When resources are available the first step would be to retain the services of a branding specialist to initiate a research-based process for developing a tourism brand for the Huronia area.

5.7.2 Enhance Internet Presence

The Internet in all its forms – email, proprietary websites, regional web portals, online travel agencies, video, social media, etc. – is the primary trip planning tool for most travellers, and is quickly becoming the primary means to purchase travel products and services as well.

“Over the long term, places with strong, distinctive identities are more likely to prosper than places without them. Every place must identify its strongest, most distinctive features and develop them or run the risk of being all things to all persons and nothing special to any”
Robert Milton Solow, Nobel Prize Laureate

Currently, trip-planning information about the study area is available through a number of regional and local destination area websites, as well as proprietary websites for individual attractions, festivals and events, lodging, marinas, dining and retail. However there are two weaknesses that need to be addressed:

- First, there is a lack of consistency in how the study area is presented by the regional and local destination area websites. The confusion includes the variety of different names used to identify the study area (such as Georgian Bay, Southern or South Georgian Bay, Huronia, Simcoe County) and the inconsistency in identifying the geographical extent of the study area.
- Second, it is difficult if not impossible for potential visitors to purchase a package of travel products and services for the study area – each must be purchased individually which is time consuming and challenging without a strong understanding of destination area geography.

To enhance the web presence for the study area, it is recommended that:

- a consistent name, such as Huronia, be used by all regional and local destination area websites, on all proprietary websites and all social media sites when describing the study area;
- hypertext links be established among all regional, local destination area and proprietary websites that provide trip planning information about the study area; and
- at least one website be established (or equipped) to allow potential visitors to purchase packages of travel services.

5.8 Potential Economic Impacts

If a concerted effort is not taken in Huronia to move towards a more collaborative model between the four municipalities and all key stakeholders a significant economic opportunity will be missed. The implications for the tourism industry with a continuation of the status quo could include the following:

- The tourism sector will continue to lack leadership;
- Marketing will be continue to be fragmented resulting in a relatively small voice in the marketplace;
- Tourism will continue to be highly seasonal;
- The region will lack destination image and appeal;
- There will continue to be significant economic leakage out of the region;
- It will be difficult to attract tourism investment as one of the prerequisites for investors will be strong and effective destination management and marketing;
- The tourism visitation potential for the region will not be realized;
- The region will miss out on opportunities to leverage off RTO 7 and Tourism Simcoe County product development and marketing initiatives.

On the positive side, attracting more visitors to Huronia will result in new spending on tourism services and facilities, boosting the local economy and tax revenues. As an example, during its first year of operation (2014), the Keewatin attraction welcomed approximately 30,000 visitors who spent \$350,000 to tour the ship.

According to the Ontario Ministry of Tourism, Culture and Sport Tourism Regional Economic Impact Model (TREIM), every 1,000 visitors attracted to Huronia for an overnight visit can be expected to contribute to the Huronia area economy as follows:

- Approximately \$82,100 in total spending;
- Approximately \$47,600 in gross domestic product;
- Approximately \$31,400 in labour income, supporting 1 job; and,
- Approximately \$23,800 in tax revenues shared among all three levels of government.

While every 1,000 visitors attracted to Huronia for a same day visit can be expected to contribute to the Huronia area economy as follows:

- Approximately \$67,700 in total spending;
- Approximately \$33,600 in gross domestic product;
- Approximately \$21,200 in labour income, supporting 1 job; and,
- Approximately \$17,700 in tax revenues shared among all three levels of government.

5.9 Conclusion

The final Huronia Area TOURISM ACTION PLAN provides the four municipalities with the concrete framework to collectively implement a more efficient and effective model for destination planning and management, and in turn move the tourism industry to new levels of success.

The plan focuses on a coordinated approach to a tourism destination management plan and identifies opportunities for strategic development between regional and local partner organizations involved in tourism for the next three years. It encourages a refresh and enhancement to current tourism products and services to develop key and unique visitor experiences and projects a positive and bright road ahead for tourism in Huronia.

Together, with the Economic Strategy Action Plan, the TOURISM ACTION PLAN has the potential for:

- Enhanced inter-municipal cooperation to support and foster regional tourism;
- Pooling of resources including leveraging funding opportunities through the RT07, Provincial and Federal Governments; and,

- Forming community partnerships with local government, industry professionals and organizations such as Georgian College (resources and potential internship), Tourism Simcoe and regional Destination Marketing organizations.

Appendix A: Industry Consultations

The following table provides a list of Huronia Area tourism industry stakeholders/organizations that contributed to the research and completion of this Plan. Their industry expertise, expert knowledge and sharing of their tourism industry experience was gathered through various methods including participation via:

- Individual Interviews
- Online Survey
- Industry Workshop
- Visioning Session
- Open House
- Tourism Summit

Organization
10 Fold Farms
1875 A Charters Inn
Awenda Park
Balm Beach Resort
Bay Moorings Marina
Bayfort Camping
Bayport Yacht Club
Beacon Bay Marina
Beacon Shore B&B
Beausoleil First Nation
Bells Falls Camping
Best Western
Best Western Midland
Bite Me Charters
Bleu Garden Restaurant

Organization**Bluebird Meadows B&B****Boardwalk Gaming****Boating Ontario****Bridgeview Marina****Brooklea Golf & CC****Business Association of Balm Beach****Captain Ken's Diner****Capt'n Eezzzz****Castle Village****Central Marine****Champlain Commemorations****Che Di Inn****Chez-vous Chez-nous****Ciboulette et Cie****Click to Start****Comfort Inn Midland****Copeland Woods B&B****COSMOS Yacht Charters****Dino's Fresh Food Deli****Diverse Rentals****Dubeau Farm****EcoHuronie****Fast Forward AVU****Favourlicious****Fresh Flowers by Leanne****Froth Café****Galerie Gale B&B****Georgian Bay Beach Club**

Organization

Georgian Bay Cruises

Georgian Bay Islands National Park

Georgian Bay Massage Therapy

Georgian Bay Snowriders Association

Georgian Health & Wellness

Georgian Terrace Guest House

Gianetto's Market

Graffiti Art

Gratrix Garden Lilies

Grounded Coffee Co

Harbour West Marina

Harris Family Farm

Highview Farms

Hindson Marina

Hurononia Airport & Midland Ratepayer Group

Hurononia Food Trail

Hurononia Museum

Hurononia Players

Hurononia Players Theatre

Hurononia Trails & Greenways

Kings Inn

Kings Wharf Theatre

Lafontaine Park Camping

Le Maitre D'

Lilly's Italian Eatery

Little Lake Inn

Lot 102 Restaurant

Mad Michael's Restaurant

Organization**Martyr's Shrine****Midland Bay Sailing Club****Midland Cultural Centre****Midland Curling Club****Midland Farmers Market****Midland Golf & CC****Midland Inn****Minds Alive****Miss Midland Cruises****North Simcoe Community Futures****North Simcoe Sports and Recreation Centre****Northwest Basin Marina****Olympia Restaurant****Parkbridge Marinas****Penetanguishene Museum & Archives****Perfect Pizza****Phil's Casual Dining****Primrose Cottages****Queen's Cove Marina****Quest Art****Sharron's Boutique****Shoes to Boot****Silver Star Motel****Simcoe County Farm Fresh****Simcoe County Trails****Simcoe Cycling Club****Simcoe North Liberal Association****Southern Georgian Bay Chamber of Commerce**

Organization

SS Keewatin

St Marie Among the Hurons & Discovery Harbour

Sugar Ridge Retreat

Sunport Beach Resort & Motel

Super 8 Midland

Tay Motel

The Boathouse Eatery

The Burger Barr

The Elegant Gourmet

The Explorer's Café

The Georgian Bakery

The Georgian Grill

The Karma Project

The Lady Bug Café

The Library Restaurant

The Reading Room

The Surf Family Restaurant

The Yoga House

Tiny Township Shoreline Association

Tourism Simcoe County

Town of Midland

Town of Penetanguishene

Township of Tay

Township of Tiny

Tucked Inn the Harbour

Victorian Inn

Vincent Salon & Spa

Wildfire Outdoor Education Centre

Organization

William's Farm

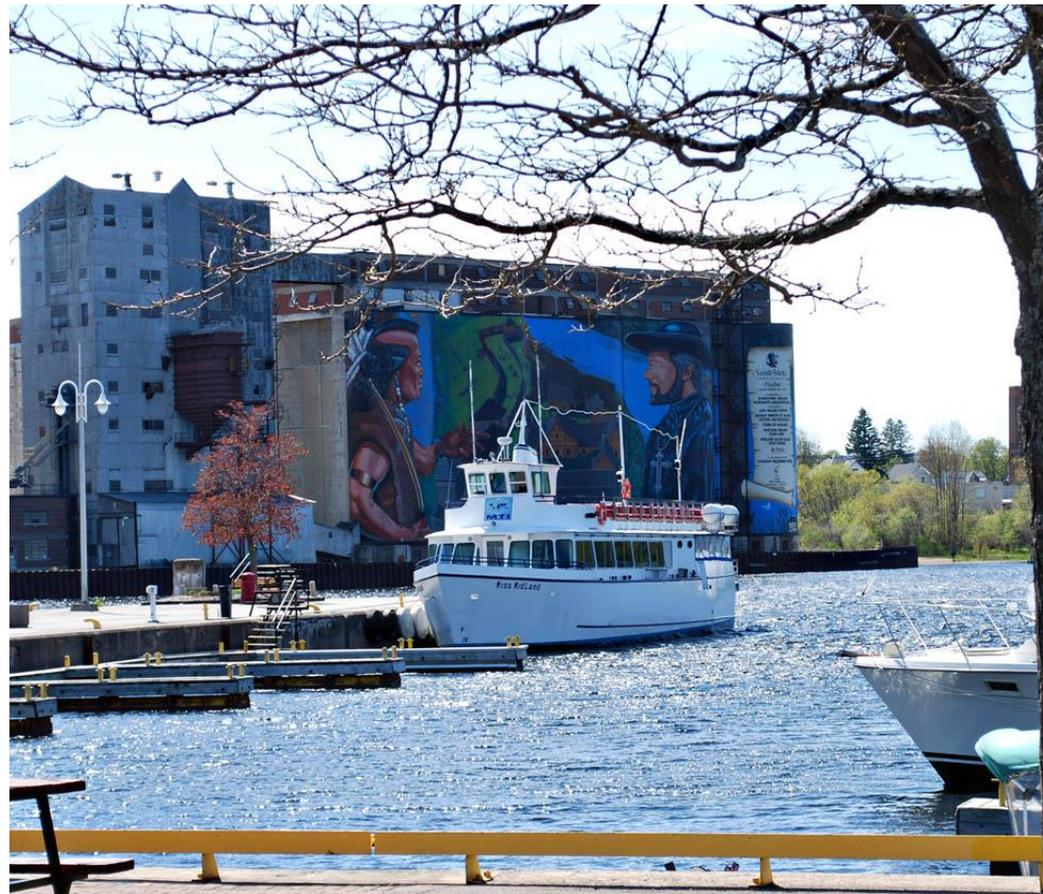
Woodland Cedar Cottage Resort

Wye Heritage Marina

Wye Marsh

Wye Marsh Wildlife Centre

Wymbolwood Beach House



Tourism Action Plan

TAP into the Future

**Partnerships • Leaderships • Communication
Coordination • Collaboration**



Industry Led and Municipally Supported



Hurononia
ECONOMIC ALLIANCE