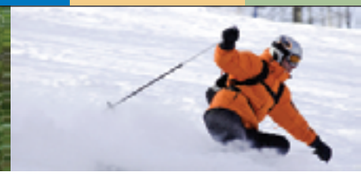
Premier-Ranked Tourism Destinations Framework Project



Lake Simcoe Tourism Area Assessment 2007

Encompassing the tourism resources of The Cities of Barrie and Orillia, Towns of Innisfil and New Tecumseth, Townships of Essa, Oro-Medonte, Ramara and Severn, and Mnjikaning First Nation

The Process, Key Findings and Recommendations

Prepared by **The Resource Management Consulting Group**
Prepared for **The LSTA Core Committee**

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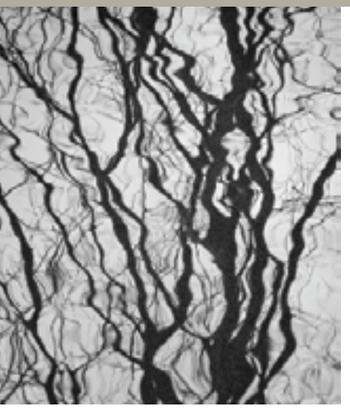


Introduction

Background

Tourism Barrie, The City of Orillia's Department of Culture & Heritage and Ontario's Lake Country agreed to jointly undertake the Lake Simcoe Tourism Area (LSTA) Assessment using the Premier-ranked Tourist Destination Framework in late 2006. Funding was provided by the Government of Canada (Service Canada) and the Ontario Ministry of Tourism. The project was completed during the 2007 calendar year.

The project was led by a Core Committee, representing Tourism Barrie, City of Orillia and the Ontario Ministry of Tourism. A Project Team of 4 individuals was hired to undertake the tourism resource audit and complete the Premier-Ranked Workbook. A Steering Committee of industry stakeholders gave input and guidance at three workshops during the course of the project. The Resource Management Consulting Group provided advice to the Core Committee and Project Team, facilitated the workshops and prepared this summary report.

The Premier-Ranked Tourist Destinations Framework

A Premier-Ranked Tourist Destination (PRTD) is a place more attractive than the rest, a place the tourist must consider first when making travel plans. It offers high quality tourist experiences that are well-validated and can be sustained into the future.

The Ontario Ministry of Tourism developed the PRTD Framework to help tourism destinations across Ontario define their competitive positions within the domestic and international tourism marketplace. It enables Ontario's tourist destinations to become "the best they can be" by methodically assessing their tourist offerings within a prescribed framework. This systematic process measures the market status of a tourism destination to provide basic input for strategically planning the future development of the destination's tourism economy.

Over the past eight years, the PRTD process has been completed for 12 Ontario destinations, and is underway for nine destinations, including the Lake Simcoe Tourism Assessment (LSTA) area. The process involves:

- A comprehensive audit of all tourism resources of the destination and summary of the results in the *Tourism Resource/Opportunity Matrix*,
- A survey of tourism-related business of the destination using a prescribed survey tool (for the LSTA, 1207 surveys were sent out and 559 businesses responded, representing 627 attractions),
- Completion of the *PRTD Self Guided Workbook* by the Project Team and Core Committee, and
- Development of recommendations to improve the viability and competitiveness of the destination to make it more attractive to tourists.

The PRTD Framework is a tool to systematically assess the strengths, opportunities and weaknesses of the tourism resources. Tourism stakeholders are directly involved in the evaluation and development of recommendations. As a result, they gain a clear understanding of their role in the destination, as well as new opportunities to enhance and develop the tourism product of the destination.

introduction

Applying the PRTD Framework

The PRTD evaluation process assesses three "dimensions" of a tourist destination: **product, performance** and **futurity**, using specific "criteria" for each dimension:

Product

The quality of the tourist experience based on the destination's:

- Distinctive Core Attractions
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility, and
- Accommodations Base.

Performance

The quality of the tourist experience and the destination's success, based on:

- Visitation,
- Occupancy and Yield, and
- Critical Acclaim.

Futurity

The ability of the destination to thrive in the future, sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

For the LSTA Assessment, the Core Committee and Project Team worked together to answer the *118 PRTD Workbook* questions based on the information compiled from the Resource Audit and surveys. Each question was answered with a yes (■) , almost (■), or no (■) response.

Then, the answers to the individual questions were compiled and each of the 11 criteria was given a yes (■), almost (■), or no (■) rating. Finally, these ratings were compiled and each of the 3 dimensions (Product, Performance, Futurity) was given an overall yes (■), almost (■), or no (■) rating.

The Lake Simcoe Tourism Assessment Area (LSTA)

For the purposes of this project, the LSTA was considered to be the Cities of Barrie and Orillia, Towns of Innisfil and New Tecumseth, Townships of Essa, Oro-Medonte, Ramara and Severn, and Mnjikaning First Nation.

The gentle landscape is characterized by several large lakes, interspersed with rolling forested hills and farmland. Lake Simcoe and the other lakes support many outdoor activities, such as swimming, fishing and boating. The Minesing Wetland, one of the largest wetlands in Southern Ontario, is recognized as a *Wetland of International Significance* under the Ramsar Convention. The Oro Moraine just north of Barrie is significant as both a recreation area and water recharge area, similar to the Oak Ridges Moraine. North of Orillia, the Carden Alvar is a rare landform, which occurs only on limestone bedrock with little or no soil. This habitat for rare wildflowers, native grasses and unique invertebrate species is opening up opportunities for emerging eco-tourism.

The LSTA is an area that provides an interesting slice of Ontario's history. Originally home to the Wendat (Huron) people, today the Mnjikaning First Nation celebrate their history, culture and arts in conjunction with Casino Rama. Early explorers, such as John Franklin traveled through the area's interconnecting lakes to reach the Canadian northwest. The Nine Mile Portage, an early Indian trail which later became a War of 1812 military route is now a recreational trail between Barrie and the Nottawasaga River. Today's farmers still work the land opened by the original settlers and log buildings and barns with original stone foundations are evident in places.

The area is well-poised to meet society's trend towards stronger environmental values. There is a strong attachment to the land. Artists and artisans celebrate the landscape and create original works using local materials. Traditional farming families and young entrepreneurs are shifting practices to meet the rising demand for local food. Simcoe County Forest trails are experiencing ever-increasing use for walking, hiking, biking, skiing, snowshoeing from locals and visitors alike. The open spaces combined

with the proximity to urban centres have combined to make the area a magnet for motorized recreation: snowmobiles in winter and ATVs in summer.

Barrie and Orillia celebrate early Ontario architecture in their revitalized downtowns. Renowned humourist Stephen Leacock characterized early Ontario town life in his book *Sunshine Sketches of a Little Town* and he became the inspiration for the Mariposa Folk and the Stephen Leacock Festivals, which are now held in Orillia. The Leacock Medal for Humour is awarded annually to the most humorous Canadian book. The Trent-Severn Waterway was a critical route for the flow of goods between Lake Ontario and Georgian Bay. It is now a National Historic Site and its lock system is used for pleasure boating.

This is Ontario's recreational heartland, offering a myriad of outdoor experiences for residents, cottagers and visitors. The area has a relatively reliable snow cover, augmented by man-made snow, and is well-known for high-quality outdoor winter product, with five downhill resorts and three cross-country facilities. In addition, ice fishermen are attracted to the deep waters of Lake Simcoe, and regional trails are used for snowshoeing, x-country skiing, dog-sledding and snow mobiling. In summer, Lake Simcoe and the smaller lakes provide boating opportunities, beach access, fishing and beautiful scenery. Land-based recreation includes golfing, road biking, water parks as well as activities such as hiking, mountain biking, horseback riding and ATV adventures that use the area's vast trail network.

Within an hour's drive of the Greater Toronto Area (GTA), the City of Barrie is one of the fastest growing cities in Canada and is targeted as a major "growth area" in Ontario's *Places to Grow Strategy*. This rapid growth is presenting challenges as well as new opportunities for tourism, such as arts, theatre, culture, restaurants, and shopping. Barrie's trails and parkland extend along the shores of Kempenfelt Bay providing the setting for summer and winter community events and activities, as well as beaches, marinas and boat launches. The City of Barrie is implementing a Downtown Revitalization Plan to enhance the waterfront resources, attract new businesses and develop new cultural attractions to a make Barrie "Ontario's Premier Waterfront Community."

The City of Orillia is also experiencing growing urbanization, although not at the same rate as Barrie as it is another 20 minutes further from Toronto. Orillia's public spaces extend along the shores of Lakes Simcoe and Couchiching, offering trails, parks, beaches and boat launches for residents and visitors. As well, the Port of Orillia provides services for marine visitors close to the downtown. The city is implementing a cultural plan to animate, energize and integrate the waterfront and downtown core by building on its natural and cultural environment.

The LSTA is fairly cohesive geographically and culturally and it is not very large (60 km x 25 km). Nevertheless, three destination marketing organizations (DMOs) promote tourism within this region: Tourism Barrie, Ontario's Lake Country and Simcoe County. Nottawasaga Futures has taken some responsibilities for tourism promotion in South Simcoe. Historically, these DMOs have competed to market many of the same products and to attract the same visitors. The PRTD Project was undertaken to examine the tourism products, resources and potential of the area without considering political and administrative boundaries.

Assessment of Tourism in the LSTA
The Product Dimension

Overall Rating of LSTA Product

THE MAJOR ASSETS OF THE AREA ARE

- *Distinctive Core Attractors*
- *Accessibility to the Toronto market*

THERE IS POTENTIAL FOR

- *Improving the quality and critical mass of attractions*
- *Increasing the range accommodation types, particularly near attractions*

THERE IS LITTLE

- *Information about customer satisfaction and what they value about the area*

Distinctive core attractions

Five core attractors, which are all uniquely linked to the area's natural environment, history and culture, draw tourists to the LSTA:

- **Outdoor Recreation**, including skiing and snowboarding, fishing, cross-country skiing, golf, hiking and other non-mechanized trail use;
- **Festivals and Events**, including Mariposa Folk Festival, Orillia Perch Festival, Georgian College Auto Show, Kempenfest , Images Studio Tour, Potato Festival, Barrie Fair, Winterfest, Elmvale Maple Syrup and Casino Rama entertainment;
- **Resort Experience**, including Bayview Wildwood Resort, Carriage Hills/Ridge, Horseshoe Resort, Nottawasaga Inn and Fern Resort;
- **Gaming**, Casino Rama, Georgian Downs and the Slots at Georgian Downs
- **Recurring Sports Competitions**, including Ontario Winter Games, Senior Winter Games, skiing/boarding, hockey, fastball, baseball, soccer, biking, running and more.

In addition, three emerging attractors, which are growing but are not yet drawing large numbers of visitors to the area, were identified. These have the potential to be future core attractors, with some investment in developing the product for the tourist market.

- **Arts & Culture**, including MacLaren Art Centre, Simcoe County Museum, Leacock Museum, Orillia Opera House, Gibson Centre and various live theatre companies,
- **Agritourism**, including farmer's markets, you-pick farms, farm gate sales, horticulture and farm tours, and
- **New Outdoor Recreation**, including snowshoeing, dog sledding, mountain biking,snowmobiling, ATV trail systems, treetop trekking, bike touring.

Four supporting attractors were also recognized. In themselves, they do not draw large numbers of tourists to the area, but may extend the visitors' stay by providing services and complimentary activities:

- Food and beverage,
- Accommodations,
- Shopping, and
- Local festivals and events.

assessment

Other destinations, such as Grey and Bruce Counties and the York Durham region offer competitive attractions, particularly for outdoor recreation. Therefore, it is important for the LSTA to build on its two major competitive advantages:

- Proximity and easy access to the GTA market and
- Facilities and topography conducive to family and novice/intermediate outdoor activities.

The core attractions of the area primarily attract three of the five segments of the Ontario tourism market.[1] Their demographic characteristics, lifestyle activities, travel preferences and marketing touchpoints are summarized in the following table:

Characteristics of Visitor's Attracted to LSTA's Core Attractors

DEMOGRAPHICS	LIFESTYLE	TRAVEL	TOUCHPOINTS
Upscale Adventurers Middle aged (45-64) Kids 18+ White collar, well educated ~1/3 ethnic presence Avg household income $122K	Arts & culture Active lifestyle Golf, ski, extreme sports Comedy clubs, casinos Professional sports	Frequent short & long trips Canada and abroad Online planning & booking Like options, personal choices Will pay for quality & value Have fun while learning Authentic experiences	Online National & local papers High end magazines Public transit downtown (not TV, radio, direct mail)
Families Lower middle age (35-54) Kids <15 Service sector White & blue collar Low ethic presence Avg household income $103K	Kid-centred lives Outdoors Family attractions Evening entertainment	Convenience and variety Nearby & year round Driving vacations Look for time saving offers Too busy to research/plan Hassle-free getaways Family options/specials Don't mind large crowds	Local daily papers Direct online advertising Outdoor billboards Parenting, children's, men's & photo magazines Top 40, classic rock radio
Retired Roamers Mature couples (55+) Empty nest Low ethnic presence Avg household income $65K	Outdoors close to home Community venues Festival, fairs, markets RV, boat, garden shows National, provincial parks Curling, snowmobiling, hunting, fishing, gambling	Economy minded, like deals Frequent drive vacations RV/camper owners Year round NA travel Book through provider Nature, scenic areas Close to home destinations	Local & national papers Magazines Direct mail Daytime TV shows Popular radio stations (not internet)

[1] Based on the $PRIZM_{CE/NE}$ market segments developed by Environics Analytics and Claritas

Highly Accessible to the GTA Market

The LSTA is highly accessible to visitors with over 5 million residents[2] of the GTA living within a 1-hour drive and 10 million people within a 3-hour drive using the 400 series highways or the more scenic back routes. The drive time to the U.S. border is approximately 2 hours and to Pearson International Airport less than one hour. There is also a regional airport located between Barrie and Orillia.

There is regular bus transportation from Toronto to Barrie and Orillia, and Casino Rama operates its own bus transportation. The GO Train began weekday operation to service commuters in 2007, and it presents a future opportunity to develop weekend tourist packages to service the Toronto market.

Quality & Critical Mass Could Be Improved

The area offers a broad range of attractions and events for tourists, including

- Outdoor recreation opportunities (including skiing and snowboarding, cross-country skiing, snowshoeing, fishing (ice, lake river), golf, mountain biking, hiking and other non-mechanized trail use)
- Culture and Entertainment – 10 live theatre companies/ venues, 9 museums, 5 art galleries plus musical amateur performances at various venues throughout the area
- Performances by recognized artists at venues in Orillia (Casino Rama) and Barrie (Gryphon Theatre, Barrie Molson Centre and the Foundation Nightclub)
- Many interesting niche activities, such as indoor rock climbing, tree top walk, paintball, waterpark, hot air balloon rides, pow wows, historical walking tours and steam train ride
- A wide variety of dining options, ranging from road houses to fine dining, with over 50 restaurants with accredited chefs and many with name recognition beyond the area
- Shopping at quaint downtown shops, shopping malls and the major outlet stores
- Some co-ooperative animation of public spaces, such as UrbanVisions07 in Downtown Barrie, Barrie Town Crier, Orillia Festival of Banners, Doors Open Orillia and Art on Main (New Tecumseth)

However, respondents to the Premier-Ranked 2007 survey indicate that most visitors, with the exception of those staying at resorts, stay for less than two days and most of the area's activities and events sustain interest for less than 24 hours.

Accommodation Offerings Are Evolving

There are over 150 accommodations within the area, including campgrounds (34), bed and breakfasts (46), mid-market hotels/motels (46), resort lodges (11) and time shares (5). The single high-end accommodation is offered at Casino Rama.

Little Tracking and Research of Customer Satisfaction

Overall, there has been very little visitor tracking and research in the area. Three research projects provide some insight into tourism trends:

- As part of the 2007 Premier-Ranked survey, LSTA businesses reported that
  - Overall trends for both visitation and price have been flat to slightly increasing; and
  - Emerging attractors, such as agritourism and adventure outfitters have been experiencing the greatest increases in visitation.
- The PKF 2006 analysis of accommodation market performance reported City of Barrie average room revenue declined by 12% between 2001 and 2006.
- Winter and Summer visitors survey undertaken by Georgian College students in 2006 found that over 90% of City of Barrie visitors were satisfied.
- A survey of Tourism Barrie and Ontario's Lake Country web site users by Georgian College students in 2007 found that many view the area as their own "backyard playground, visiting repeatedly, primarily for outdoor recreation."

In addition, over the past 10 years, Georgian College Research Analyst and Tourism Management students have undertaken visitor surveys for a variety of events, such as the Images Studio Tour, Georgian College Auto shows and Mariposa Festival. However, there is no consistent, ongoing research to determine whether the area is considered hospitable by guests, travel agents or tour operators and whether visitors feel that they receive value for money spent.

[2] Although market assessment not part of the Premier-ranked process, the 2006 Census results were released during the course of the project. They clearly showed that the ethnicity of the GTA, the primary market for the LSTA area, is changing. In 2006, immigrants made up almost half (45%) of the Toronto Census Metropolitan Area (CMA) population of 5 million people. Half of these immigrants (22%) came from Asia and the Middle East. Significantly, South Asian immigrants comprised 8% of the 2006 CMA population, being led by immigrants from India (51% increase since the previous census). Eastern Asia (including China and Hong Kong) comprised 7% of the 2006 CMA population, led by immigrants from China (40% increase between 2001 and 2006). (2007 Census Statistics Canada 94-577-XCB2006004)

The Performance Dimension

Overall Rating of LSTA Performance

- IN TERMS OF VISITATION STATISTICS SIMCOE COUNTY PERFORMS WELL
- THERE IS POTENTIAL TO IMPROVE THE CRITICAL ACCLAIM
- OCCUPANCY AND EXPENDITURES ARE BELOW PROVINCIAL NORMS

Strong Visitation Performance[3]

According to the most recent statistics, Simcoe County attracted 6.9 million visitors in 2004. This represents 6% of Ontario's total tourism visits. The County attracted a significant share (8%) of pleasure-motivated travel by Ontario residents, but a small proportion (2%) of the provinces' meeting and convention travel.

In 2004, 43% of visitors to Simcoe County stayed overnight (compared to 40% for Ontario) and the remainder (57%) were day visitors (compared to 60% for Ontario). The majority of both day and overnight visitors to the County were Ontario residents.

Simcoe County's share of Ontario visitors relying on LSTA's core and supporting attractions was higher than our neighbouring destinations' share of visitors for the same types of attractions in 2004. It is not unexpected that skiing, gaming and shopping are higher because of the major ski resorts, Casino Rama and the Georgian Mall. But understanding the relatively high proportion of visitors that come to the County for golfing, outdoor recreation, fishing and festivals and events is important for future tourism positioning.

Visitation Patterns (2004)[4]

	SIMCOE COUNTY		% of Ontario's
	Overnight	Day	visitors
Ontario	93%	98%	94%
Other provinces	2%	0%	1%
U.S.	4%	1%	1%
International	2%	1%	4%

Share of Ontario's Visitors for LSTA's Core Attractors (2004)

	SIMCOE COUNTY	MUSKOKA	PETERBOROUGH	GREY COUNTY	BRUCE COUNTY
Skiing	60%	1%	0%	6%	0%
Gaming	12%	1%	2%	0%	1%
Golfing	10%	7%	4%	3%	7%
Other Outdoor	9%	5%	4%	3%	3%
Fishing	6%	6%	5%	2%	2%
Shopping	6%	2%	2%	2%	2%
Festivals/Events	6%	3%	3%	1%	3%

Critical Acclaim Could Be Improved

Although many of the individual attractions in the LSTA have received awards and recognition, as have the marketing campaigns of Tourism Barrie, the area itself does not have a strong identity and is not recognized as a must-see travel destination.

[3] In this section, all visitation statistics are based on 2004 CTS/ITS Statistics for all of Simcoe County. Data are not available for the LSTA area.

[4] The Barrie statistics were collected in co-operation with PKF Consulting. Similar data are not currently available for Orillia.

Marketing of the Area as a Tourist Destination is Fragmented

Research shows that there is a strong demand for the tourism products of the area (CTAMS 2006) by Canadians traveling in Ontario.[8] Predictions based on age, education and ethnicity indicate that demand for these products should be stable for the next 10 years.[9]

Motivations for Canadians Traveling in Ontario (2006)

LSA ACTIVITY	PROPORTION
Sunbathing/beach	17%
Shopping/Dining	16%
Prov/Federal Park	11%
Fishing	10%
Swimming in lakes	9%
Downhill skiing	8%
Casinos	6%
Same-day hiking	5%

Participation of Canadians Traveling in Ontario (2006)

LSA ACTIVITY	PROPORTION
Shopping/Dining	82%
Sunbathing/beach	39%
Swimming in lakes	34%
Prov/federal park	29%
Casinos	25%
Same-day hiking	23%
Museums, history	22%
Fishing	20%
Farmer's Markets	19%
Golfing occasionally	15%
Downhill skiing	12%

Emerging attractions are consistent with up-and-coming leisure and recreation trends: agritourism and increased desire to consume locally grown food, appreciation of authentic arts and cultural experiences, new challenges in outdoor experiential recreation and authentic festivals and events that not only entertain, but also make a positive contribution to the community.

Currently, three DMOs are responsible for tourism marketing in the area: Tourism Barrie, Ontario's Lake Country and Simcoe County. Nottawasaga Futures becomes involved in the tourism marketing when funding is available. In addition, there is an industry-lead initiative to develop Georgian Bay as an icon destination (to attract visitors on a scale similar to Niagara Falls). Historically, the efforts of these organizations have not been co-ordinated, despite the fact that they are frequently marketing the same tourism product.

Each DMO has a different funding model and is accountable to different funding bodies, which partially explains their historical inability to co-ordinate marketing efforts:

- **Tourism Barrie** – annual administrative fees, advertising revenue, City of Barrie grant
- **Ontario's Lake Country** – member dues, advertising revenue, grants from Orillia, Ramara, Severn, Oro-Medonte & Mnjikaning, funding from Casino Rama
- **County of Simcoe** – tourism development and marketing services delivered by the County, advertising model

At the present time, none of the DMOs has a comprehensive tourism development and marketing strategy in place. Tourism Barrie and Lake Country are both working on their strategic plans for completion in 2008 and the County of Simcoe is embarking on a new model for delivering tourism services, starting in 2008. Because all of these organizations are in a state of transition, this could be an ideal time for them to take steps to co-ordinate their efforts.

[8] Canadians traveling in Ontario comprise 98% of Simcoe County's Day visitors and 95% of the County's overnight visitors based on based on 2004 CTS/ITS Statistics.

[9] TNS Market Facts for Ontario Ministry of Tourism predictions based on 2006 Ontario TAMS data.

Key Findings

Product

Many of the LSTA's core attractions are uniquely linked to the natural environment, history and culture of the area and they attract high proportion of visitors compared to nearby destinations. Nevertheless the area has the potential to be a more important tourist destination than it is.

- **There are many opportunities to fine tune the existing tourism product and add complementary products to enhance visitors' experiences.**
  - Regional trails are not "tourist ready", and the County of Simcoe is embarking on a new initiative to improve parking, maintenance, wayfinding and reduce user conflicts.
  - More co-operative product development and strategic marketing of local ski resorts would help them compete with Blue Mountain.
  - Simcoe County Farm Fresh is raising the importance of local food. With the increasing awareness of the importance of eating locally, visitors from the city welcome the opportunity to eat locally-grown fresh food. These visitors must eat while they are in the area, and this presents numerous opportunities to present them with local food: restaurants, at the farm and at the farmer's markets.
  - Major festivals could attract more tourists by developing packages and partnerships with complimentary attractions, events and accommodations as well as collaborative marketing to visitor markets in conjunction with the DMOs.
  - Visitors at fractional ownership and time-share properties, who generally stay for at least a week and come to the area in all seasons of the year, are important visitors that current marketing programs are not reaching.
  - Similarly, thousands of athletes and their supporters come for recurring sports tournaments. These visitors often have time before and after their activities, as well as between events to explore the area. Indeed, in the case of multiple-day events, these visitors are frequently committed to stay overnight.
  - Mapping the inventory of tourism resources and attractions using GIS technology, to identify local and regional clusters could be a useful tool for product enhancement and development.
- **Transportation is changing: crowded highways, high gasoline prices and concerns about global warming are making people re-think their vacation transportation choices. GO Train service is now operating between Toronto and Barrie.**
  - Opportunities to use the train to bring visitors to the area from downtown Toronto could be investigated.
- **The area's activities and events typically sustain visitor's interest for less than 24 hours.**
  - Overnight visitation could be encouraged through enhancing existing products, introducing new products as well as innovative product packaging.
  - Because fractional owners and time-share guests generally stay at the resort for a week, products could be developed, fine-tuned and packaged for this consistent market of visitors who come from Ontario, Canada and abroad.
- **There has been very little visitor tracking and monitoring of guests satisfaction and perception of value for money spent.**
  - Co-operative, consistent tracking by accommodations, attractions and events would provide a clearer understanding of visitors to the area and provide input to product improvement and new product development

The LSTA - has many solid attributes that give it the potential to become an attractive destination for visitors, particularly those coming from GTA. However, there are also gaps, many of which could be filled through increased co-operation in product development and marketing, performance tracking and planning for the future.

Performance

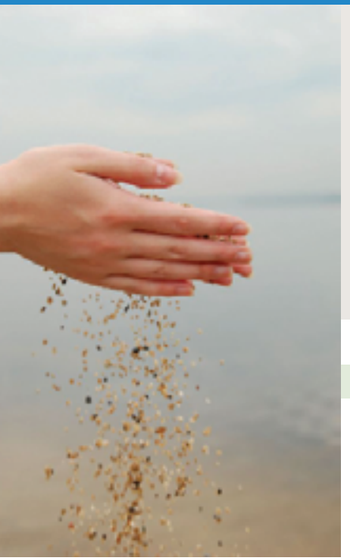
There is limited information about the area's visitation and occupancy and yield. Moreover, in the provincial context, overall market recognition is weak.

- **Visitation and trip expenditure data collected for Simcoe County Census Division, do not accurately reflect LSTA. Tourism, particularly overnight visitation, is stronger in the Collingwood-Wasaga beach portion of the County due to the presence of Georgian Bay and the Niagara escarpment, combined with the expansion of Blue Mountain as a four-season resort.**
  - Primary research regarding LSTA visitors' motivations could be carried out in conjunction with the tracking and monitoring recommended above. If the questions are consistent with the Canadian Travel Survey, this would help fill the information gap.
- **Hotel occupancy and yield data are collected by PKF for the "Central Ontario" travel region, which is larger than the LSTA. Tourism Barrie has reached an agreement with PKF to provide data for Barrie hotels.**
  - A broader agreement could be reached with PKF to obtain occupancy and yield data for the entire LSTA.
- **Although hotel occupancy and yield data for Barrie indicate that occupancy is below industry standards, additional small brand-name hotels are planned.**
  - Product improvement, development and packaging are needed to attract visitors to fill these rooms, get the most out of their experience, encourage them to return and recommend this area to others.
- **Although the LSTA has strong tourist attractions, they do not have critical acclaim and are not must see/must do experiences. This, in part is a result of fragmented marketing efforts and underdeveloped product.**
  - Awareness in the critical GTA market could be raised through concerted, ongoing unpaid media coverage and a website portal for the LSTA.

Futurity

Most LSTA attractions continually invest in product development and renewal, however marketing of the area as a tourist destination is fragmented.

- **The three DMOs do not have a history of co-operation and frequently compete for members and advertising dollars.**
  - They could work together to improve marketing and product development efforts where there is mutual benefit, recognizing that it is difficult for attractions to work with multiple competing DMOs. Existing and potential visitors are confused by DMOs competing to market the same attractions.
- **DMOs are in the process of developing strategic plans.**
  - They could work together to ensure that their plans complement each other to deliver the innovative product development and high quality marketing for the attractions of the area.
  - Branding of the area should not be initiated until the relationships among the DMOs become more stable.
- **Tourism businesses want support in their efforts to attract, train and retain management, culinary and front-line employees.**
  - Georgian College, private training organizations, school boards and industry and educators in co-operation with the Simcoe County Training Board could continue to increase their efforts to attract and train people to meet the needs of tourism-related businesses in the area.
- **The LSTA has the natural resources, physical capacity and infrastructure to absorb more visitors and a "sustainable tourism" approach would help this continue into the future**
  - Many existing attractions and events could evaluate their product offerings to find ways to increase "sustainability".
  - Sustainability could be a cornerstone for new product development.



Recommendations

The following six recommendations have been developed based on the results of the Premier-Ranked project, in consultation with the project Core and Steering Committees. Three DMOs, Tourism Barrie, Ontario's Lake Country and the County of Simcoe is to develop working relationships in order to fully implement the recommendations of this project.

1. Clarify role and function of the DMOs in the LSTA

Winter 2008

■ Each of the DMOs should

- Clarify, focus and redefine the goals of the DMO in the context of the results of the Premier-Ranked Project
- Establish a SWOT of their service capabilities

■ A "Follow Up" Committee, representing the four DMOs and Ministry of Tourism should

- Be established to implement Premier-Ranked recommendations
- Include Nottawasaga futures in ongoing discussions and communications
- Work with a facilitator to establish roles and responsibilities for implementation of recommendations
- Set up a web portal to link on-line marketing activities

Outcome

- **DMOs will focus on developing experiential partnerships and products**
- **DMOs will develop and market tourism products collaboratively**
- **A new funding model for tourism product development will emerge**

2. Develop product-based partnerships that focus on experiences, not geography

2008+

■ The "Follow Up" Committee should

- Enhance existing ski, golf and fishing product development partnerships and re-structure "Product Implementation" Teams if necessary
- Prioritize introduction of new experiential products
- Select the first product(s) for partnership development
- Build new "Product Implementation" Team(s)
- Seek funding to
  - Enhance/develop product(s) that are authentic to the area and are most likely to attract visitors
  - Assess the feasibility of integrating GO Train service into product enhancement and development

■ The "Product Implementation" Teams should

- Facilitate the enhancement/development of tourism product
- Nurture grass-roots product champions
- Allocate a tracking & research budget for each product
- Incorporate sustainability and emerging environmental values as part of product development

Outcome

The LSTA will become a tourism destination that

- **Offers a complete tourism experience to visitors in a seamless and coordinated way, and**
- **Nurtures industry/DMO/Municipality partnerships**

recommendations

3. Set up a task force to evaluate training needs and recommend a training/education strategy for tourism/hospitality employees and business owners/operators in this area

2008

■ **The "Follow Up" Committee should set up a "Training Task Force" to**

- Develop strategies to attract and retain employees
- Identify training needs
- Find new ways to support/sponsor students in the tourism industry through internships and scholarships
- Identify needs for employer workshops, such as human resources, best-practices, entrepreneurship and utilizing marketing research
- Seek opportunities for developing and delivering the required training and workshops through government funding, community college programs, private training facilities and not-for-profit organizations

■ **The efforts of the "Training Task Force" should be co-ordinated with Simcoe County Training Board initiatives.**

Outcome

The area will

■ **Develop and retain a skilled & loyal tourism and hospitality workforce**

■ **Have tourism employers with industry recognition for rewarding tourism careers**

4. Develop and implement a strategy for developing, co-ordinating and enhancing regional tourist events

2008/9

■ **The "Follow Up" Committee should**

- Look at all events across the area from a non-competitive perspective to identify
  - Major events that attract a significant proportion of tourists
  - Event themes that relate to the products being developed
  - Timing conflicts, co-ordination opportunities, gaps
  - Events that have the potential to grow as major tourist attractors
- Establish an "Events Task Force" representing DMOs and major event planners

■ **The "Events Task Force" should**

- Seek funding to co-ordinate, develop and enhance those events that have the potential to grow into major tourist attractors
- Set up systematic, shared tracking/research model for major events with one consistent survey, sampling protocol, analysis and funding model
- Implement event research at several major events throughout the area
- Develop an event web portal for the area focused on major events of interest to tourists

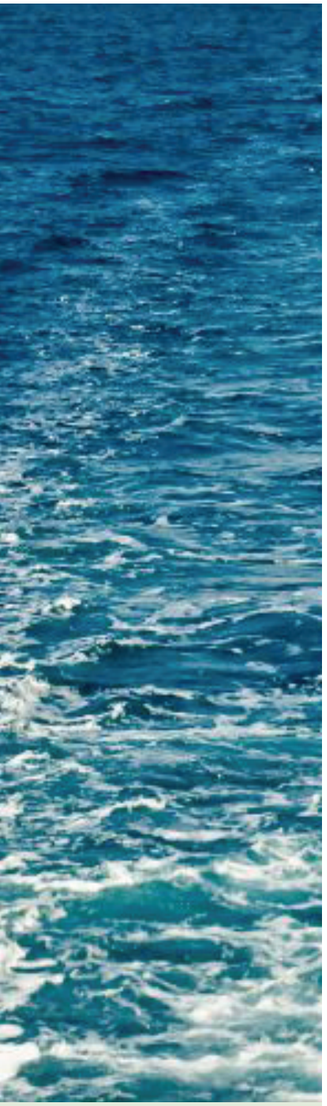
Outcome

■ **DMOs will focus on events with a strong tourism potential, rather than all community events**

■ **Major events with tourism appeal will become:**

- **Better co-ordinated throughout the area**
- **An integral part of the developing tourism product**

■ **It will be easier for visitors to find out what is "happening" in the area**



5. Ground decisions in marketing research to provide a solid foundation for decision-making and investment credibility
2008/9+

DMOs should

- Participate in ongoing provincial and regional research such as PKF quarterly accommodation reporting and business retention and expansion (EDOs)
- Include marketing research training workshops in the annual *Beyond City Lights Tourism* conference

The "Product Implementation" Teams and "Events Task Force" should

- Integrate marketing research into new experiential product development and major tourist events

The "Training Task Force" should increase the use of marketing research by tourism business and event planners by

- Seeking funding, support and sponsorship for marketing research training workshops/symposiums
- Hosting training workshops/symposiums

Outcome

Tourism businesses will be successful, entrepreneurial and proactive because they have better understanding of their customers and feedback about the experiences and services they provide

6. Branding will be critical to the success of marketing the tourism products of the area but should be delayed until progress has been made in achieving the other recommendations.

The Core Committee and Steering Committee recognize that branding will be essential to the future of tourism in the LSTA. They also feel that timing is important and that the tourism businesses of the area will be better served by delaying the branding exercise until the DMOs and tourism businesses of the area are successfully collaborating on the recommendations relating to product development, event co-ordination, training and research.

Outcome

The area will become a recognizable tourist destination, promoted with a unified voice and image

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