

MUSKOKA ASSESSMENT PROJECT

Premier-Ranked Tourist Destination Framework



Muskoka A Premier-Ranked Tourist Destination

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Muskoka Tourism acknowledges and thanks the many tourism operators, industry colleagues and governments who contributed to the success of the Muskoka Assessment Project (MAP) using the Premier- Ranked Tourist Destination Framework (PRTD).



MUSKOKA ASSESSMENT PROJECT

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This project was made possible by funding provided by the Investment Development Office of the Ministry of Tourism; FedNor; Service Canada (Employment Ontario); the District Municipality of Muskoka; the Towns of Gravenhurst, Bracebridge and Huntsville; and the Townships of Muskoka Lakes, Lake of Bays and Georgian Bay.



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Consultation and engagement of tourism operators was key to the success of the Muskoka Assessment Project. Muskoka Tourism gratefully acknowledges the following for their commitment of time and knowledge.

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- Judy Terry, Muskoka Bay Clothing Company
- Christopher Thorpe, Muskoka Community Futures
- Marg French, Planning & Economic Development, District of Muskoka
- John Finley, Economic Development, Huntsville
- Cheryl Kelly, Economic Development, Bracebridge
- Ann Curley, (Former Gravenhurst Chamber Manager)
- Joseph Klein, Deerhurst Resort
- John Cosgrove, Township of Muskoka Lakes
- David Parks, Township of Georgian Bay
- Ron Begin, FedNor
- Randy Clark, Ministry of Tourism
- Robyn Scott, Muskoka Tourism

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- Don MacKay, Muskoka Highlands Golf Course
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- Doug Wilson, Diamond in the Rough Golf and Country Club
- Orla and Darla Irwin, Algonquin Art Centre
- Amy Taylor, Bala Cranberry Festival, Muskoka Community Futures
- Debbie Miller, Algonquin Theatre

Accommodations, Conference and Transportation

- Bill Sullivan, The Inn at Christie's Mill
- Joseph Klein, Deerhurst Resort
- Don Hood, Muskoka Woods Sports Resort
- Norm Yan & Sandy Yudin, Muskoka Bed and Breakfast Association
- Greg Hammond, Hammond Transportation
- Mark Stirling, Muskoka Airport
- Samantha Hastings, District of Muskoka
- Esa Paltanen, Delta Sherwood Inn
- Joanne Young, Sequel Hotels and Resorts

Retail and Services

- Rob McPhee, Muskoka Community Network
- Judy Terry, Muskoka Bay Clothing Company, Gravenhurst BIA
- Anne Curley, Muskoka Boat & Heritage Centre
- John Crawley, Bracebridge Chamber of Commerce
- Jane Templeton, Muskoka Lakes Chamber of Commerce
- Kelly Haywood, Huntsville/Lake of Bays Chamber of Commerce

Food & Beverage / Agri-tourism

- Rory Golden, Deerhurst Resort
- Kim Barnes, The Butcher's Daughter
- Patricia Snell, Muskoka Roastery Coffee
- David Freissen, Riverwalk Fine Dining and Club One
- Katya Riley, Brooklands Farm

Other Acknowledgements

Ontario Ministry of Tourism

- Randy Clark - Tourism Industry Advisor
- Paul Samson - Tourism Industry Advisor
- Christine Anderson - Tourism Industry Advisor
- Jackie Ma - Tourism Industry Advisor

MAP Project Team

- Project Manager Carolyn O'Donnell
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Muskoka Tourism Marketing Agency:

- Gary Froude, Chairman
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Graphic Design:

Carolyne Wagland, Gravity Art & Design

Photo Credits:

Photos and artwork have been donated for one-time use in this publication by: Bev McMullen, Larry Wright, Donna (deVries) Buchan, Mike Woodside, Robbie Preston, Ron Challenger, Carolyne Wagland, Shannon Lafferty, Muskoka Heritage Place, Bracebridge Rails Museum, Bala's Museum with Memories of Lucy Maud Montgomery, Woodchester Villa and Muskoka Boat & Heritage Centre. All images are fully owned and copyrighted exclusively by all respective artists, photographers, and organizations.

Cartography:

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Printing:

Exodus Graphics Corporation

Data Base Consultant:

Jamie Jordan, Macs @ Work

This report contains key recommendations that if implemented, will have a positive impact on all of those who live, work and visit Muskoka.



Muskoka A Premier-Ranked Tourist Destination

Background

Why complete the Premier-Ranked Tourist Destination Framework?

The Muskoka region has long been recognized as a unique, four-season tourist destination. In fact, the tourism industry in Muskoka is by far the District's largest industry and employer. No other sector in the region comes remotely close to creating the jobs and labour income that tourism does.

For example, in 2004, tourism generated close to 3,000 jobs and \$113 million in labour income. In the same year, 1.9 million visitors came to Muskoka and spent \$234 million in the region. That generated \$102 million in taxes for all levels of government, including over \$5 million in municipal taxes that accrued to the District of Muskoka. Overall, tourism in Muskoka generated direct, indirect and induced contributions to the gross domestic product of \$163 million. Therefore, a strong, vibrant tourism industry has a positive impact on all those who live, work and visit Muskoka.

Despite its significant impact on the economy, the tourism industry has faced tremendous challenges over the past few years and Muskoka is no

exception. Post September 11, fear kept most vacationers from traveling and border security issues were another major deterrent. Shortly thereafter, Ontario had to deal with the spectre of SARS and West Nile. Poor weather was also a factor with unusual amounts of precipitation in the high season and one of the countries most serious black-outs in the summer of 2003.

More recently, gasoline prices have reached unprecedented highs. Evidence is mounting that many visitors from Muskoka's largest market - the Greater Toronto Area - may have dismissed the idea of taking a quick trip to Muskoka for an overnight getaway due to the high price of gas. Further, the lucrative second home market may also be reducing the number of trips they take to "the cottage" for the same reason.

Further, the Canadian dollar has strengthened to the point where it is almost on par with the U.S. As a result, after more than 15 years Canada is no longer viewed as a great value by the Americans. This combined with ongoing border security issues and the WHTI/Passport issue has further impacted US visitation at a time when the number of American visitors to Ontario is at an historical 32-year low.

Tourism operators who were already hard hit are also facing challenges on

other fronts. Rising energy costs, increased insurance premiums and government-mandated water regulations, testing procedures and costly treatment systems have all added to the burden of rising operating costs and decreased profitability. A lack of capital to invest in aging infrastructures also plagues some operators.

In addition, the Muskoka region faces increasingly stiff competition from neighbouring destinations, provinces and indeed other countries. For example, where Muskoka once competed with approximately 50 destinations in the Province, there are now close to 170 destinations actively marketing themselves in Ontario.

Marketing budgets at all levels - Federal, Provincial and local - are inadequate. In Muskoka, the challenges are even greater. Following a number of years of decline, many tourism operators do not have the discretionary dollars to invest in marketing. As a region, Muskoka may suffer a competitive disadvantage in that the region has not adopted a voluntary destination marketing fee (DMF) which would help fund marketing initiatives. Many competing destinations have implemented DMF's, which allow them to make major investments in marketing and leverage those funds to acquire additional partnership dollars.



Muskoka Tourism recognized that strong measures would be needed to address the challenges of a tough market.

Declassification of Muskoka as part of Northern Ontario at the Provincial level has also meant that destination marketing organizations such as Muskoka Tourism and local governments, no longer have access to funds that might have previously been available to them.

The benchmark year for tourism profitability was 2000, and in absolute dollars, the forecast is that industry will not see similar returns until 2008. However, all is not doom and gloom.

In early 2005, following five years of decline on all key tourism benchmarks (1998-2004), Muskoka Tourism recognized that strong measures would be needed to address the situation and the Premier-Ranked Tourist Destination (PRTD) framework developed by the Ontario Ministry of Tourism was judged to be an excellent tool to help the destination meet the challenges before it.

The Ministry designed the PRTD to help destinations inventory and analyze themselves in the tourism marketplace. It helps destinations identify potential areas for tourism investment and development, assess their competitive advantage, and ultimately improve to become a destination of choice.

Several regions in Ontario have completed PRTD framework including the Regional Municipalities of

Halton, Niagara, York, Prince Edward County and Durham. The cities of Mississauga, Hamilton and Kingston have also completed their assessments and have used the results to develop comprehensive tourism plans. The 1000 Islands and The City of Toronto are currently completing their assessments, as are scores of others. Therefore, it was a competitive imperative that the Muskoka region, complete the PRTD process as well.

Initial conversations about completing the PRTD process in Muskoka began in late 2004 and it took most of 2005 to engage potential funding partners including governments at the local, provincial and federal levels. Funding applications were submitted and deputations to every council in the Muskoka region were carried out in late 2005. By the Spring of 2006, local governments had endorsed their budgets and announced their intention to participate in this important project.

At the same time, the Investment Development Office of the Ministry of Tourism, FedNor and Service Canada (now Employment Ontario) also committed to providing funding for this important project. By the Spring of 2006, all partners were committed and close to \$200,000 in funding had been secured to undertake this year-long research effort.

In the summer of 2006, Muskoka Tourism hired a Project Manager to spearhead the research and the Muskoka Assessment Project was born. The Muskoka Assessment Project or MAP was the name given the PRTD process in the Muskoka Region.

It should be understood that the Muskoka Assessment Project is a shared initiative of the tourism industry, Muskoka Tourism and local governments. It is a shared process and the successful implementation of the recommendations is based on a thorough understanding, appreciation, engagement and endorsement from all parties. As such, all partners must accept accountability for delivery if it is to be viewed as productive and sustainable over the long term.

Consultation was key throughout the process and as a result, it can safely be said that the tourism industry in Muskoka has endorsed the recommendations contained in this report. It is the culmination of many hours of diligent work, dialogue and compromise. This report contains key recommendations that if implemented, will have a positive impact on all of those who live, work and visit Muskoka.

performance

futurity

product



Premier-Ranked is defined as: "A place more attractive than the rest, a place the tourist should consider first when making travel plans."



Muskoka A Premier-Ranked Tourist Destination

Introduction

What is the Premier-Ranked Tourist Destination Framework?

The Premier-Ranked Tourist Destination Framework (PRTD) was developed by the Ontario Ministry of Tourism to provide a means for tourism destinations across Ontario to define their competitive position within the tourism marketplace.

The Ministry of Tourism developed a resource audit and workbook format that outlines the attributes, factors and conditions that are considered pre-requisites for a tourist destination to be considered serious in building the economic well-being of its destination in order to grow tourism revenues for the destination and its tourism shareholders.

The workbook format provides a methodology that communities can follow to ensure consistency, accuracy and maximum involvement of key tourism and economic development stakeholders. The workbook emphasis is on enabling any tourist destination, of any scale, to operate at the highest possible level it can achieve - not necessarily in competition with other operators, but in a complementary context within that particular destination.

It should be noted that Premier-Ranked is not a formal tourism design

plan but, rather an internal tourism goal to help destinations become “better than the rest” by improving their viability and competitiveness as a place people want to visit. Ultimately, the final determination of rank is less important than the insights gained through the process, and the conversion of those insights into actionable, achievable recommendations for improvement.

The Three Dimensions of Tourism Assessment

There are three specific dimensions of tourism assessment that were included in the Muskoka Assessment Project:

1) The Product Dimension

This dimension is achieved by a destination that provides a high quality tourist experience, enabled through the following offerings:

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

2) The Performance Dimension

The performance dimension looks at the destination’s success in providing a quality tourist experience. This is validated by examining:

- Visitation
- Occupancy and Yield
- Critical Acclaim

3) The Futurity Dimension

Sustainable tourism is critical to any destination. In this dimension, the process looks at the destination’s ability to thrive from tourism into the future. Critical to sustainability are:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

The Rewards of Completing the Assessment

In examining these dimensions, the research involved several critical steps along with a serious commitment and investment of time by industry partners. This investment of time and energy was rewarded with specific insights and direction and at the conclusion of the project the region has been rewarded with:

- A database of critical baseline tourism business data
- An understanding of Muskoka’s current state and destination status in the larger tourism marketplace and the opportunities and challenges constraining that status
- A solid base for preparing a long-term regional destination development

- A destination marketing plan and marketing strategy
- Product development and partnership opportunities and a foundation to attract tourism investment and create employment opportunities
- An opportunity to capitalize on investments made by the tourism industry in new product development, which in the case of Muskoka is significant
- Recommendations that support the growth and sustainability of the tourism sector
- An opportunity to increase overall revenues of tourism operators within the region while improving visitor experience

An additional benefit of the Muskoka Assessment Project is that it mobilized an expanded and more capable network of industry stakeholders. By working through the process, stakeholders had a more cohesive focus on assessing current challenges and creating greater opportunity to align efforts to face future challenges together.

It is apparent that tourism and economic development stakeholders in the region have a strong desire to constantly improve and enhance the well-being and quality of life of its resident population and at the same time support the strong business community that is found in Muskoka. The PRTD process, a shared initiative of the tourism industry and government, is a significant step in ensuring this happens.

The Project Process

The Premier-Ranked Tourist Destination Framework was designed to guide a research team - in this case, the MAP Project team - through several key steps including data base design and collection, evaluation, interpretation and planning.

Step One: Preparation

Project Startup, Data Base Design & Collection

In this phase of the project, the following key deliverables and milestones were achieved:

- Project manager and researchers were hired and installed in MAP Office
- Critical path, communications/ media relations and stakeholder engagement strategies were developed
- Advisory and Industry committees were established and engaged
- A MAP website was created and a proprietary database was designed
- Surveys were created with input from Advisory and Industry committees. A core survey with standard information about tourism businesses was created along with appropriate sector specific surveys including Accommodations,

Agri-tourism, Arts/Attractions/ Culture and Heritage, Festivals & Events, Food & Beverage, Golf, Marinas, Outdoor Adventure, Recreation, Retail, Spas, and Transportation

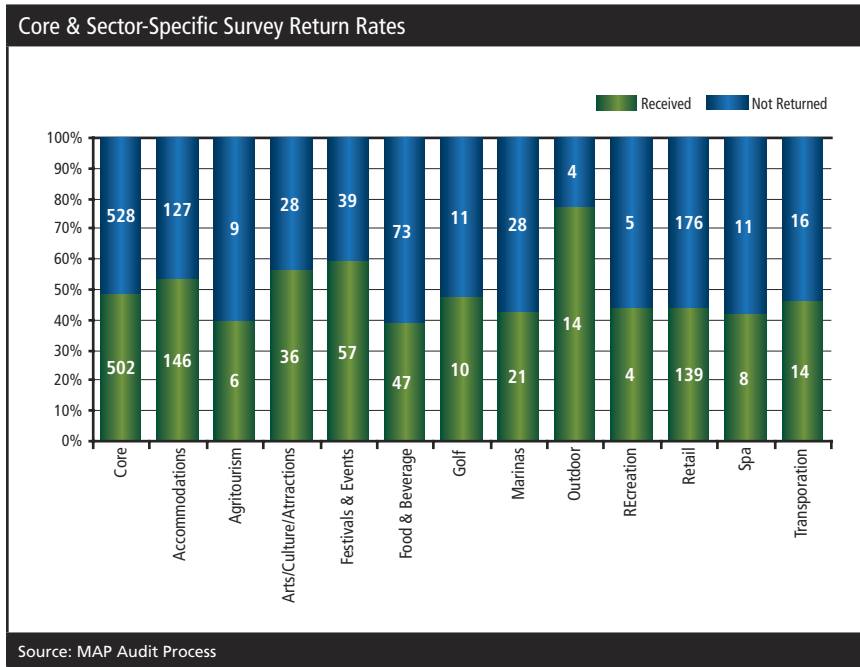
- A database of “potential” tourism businesses was created and 1,100 printed surveys were delivered to companies representing all sectors of the industry
- An online survey was also made available to those participants with high-speed internet access
- 502 surveys were completed, representing a response rate of 49%. Comparable destinations with broad geographic dispersion have had response rates of around 30%
- To achieve this level of response, numerous emails, phone calls and even one-on-one, face-to-face interviews were required to entice operators to fill out their surveys
- The survey data was accumulated, entered, clarified, analyzed and evaluated forming the basis for completing the PRTD workbook
- To augment the survey data, the Tourism Resource/Opportunity Matrix was completed and involved compiling the full range of Muskoka’s tourism resource base and its utilization; counting and categorizing the resource opportunities for each asset type and identifying core attractions, supporting

attractions, on-theme activities and underdeveloped assets; assets that participated in group travel and packaged experiences as well as the existing, potential and desired markets were all identified.

The Matrix was used in several ways:

- As a tool to guide consideration of the tourism asset base, the resources contributing to its current market penetration, and the geographic markets from which it is reasonable to expect future visitation to occur
- As an aid to identify product gaps and opportunities for future development
- As a summary reporting form

Return Rates



Return Rates by Towns and Townships

Towns and Townships	Number of Businesses	Number of Surveys Returned	Percentage (%)
Muskoka Lakes	193	85	44%
Bracebridge	218	129	59%
Huntsville	278	131	47%
Lake of Bays	95	44	46%
Gravenhurst	189	91	48%
Georgian Bay	42	12	29%
Haliburton County	1	1	100%
Algonquin Provincial Park	4	4	100%
Parry Sound District	5	2	40%
Boundary Businesses	5	3	60%
Total	1030	502	49%




Source: MAP Audit Process

Step Two: Evaluation

Assessing Muskoka’s Product, Performance and Futurity Dimensions

In this phase, the MAP project team began to assess Muskoka’s performance through a series of measures specific to the Product, Performance and Futurity dimensions of the destination. There were 118 measures to be assessed.

The first part of the measure was in the form of a statement, with an implicit question asking whether you can affirm the statement as “true” “almost true” or “not true yet”. It is answered with a “Yes”, “Almost” (“A”) or “No” and represented by the symbols shown below:

	YES - the affirmation can be made and supported for the destination
	ALMOST - the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation
	NO - the affirmation cannot be made or supported for the destination

The second part of the measure asked for the facts that substantiate the answer to the first. Responses were then transferred to the Performance Summary.

During this phase, the research team completed the following:

- Each of 118 measures or attributes related to Product, Performance and Futurity dimensions were completed using the survey data
- The results of the resource audit, an extensive library of documents, further in-depth research and interviews with key stakeholders also helped form the basis of the evaluation
- The Transportation Resources Checklist was completed. Information necessary to complete the checklist was drawn from knowledge or perceptions held in common by area stakeholders in tourism, committee and industry sessions, and through direct contact with attractions, taxi and transit service providers
- The Travel Trade Resource Checklist was completed from consultation with area attractions and tour operators. Trade association directories helped to identify the relevant operators required to complete the checklist. Additional information was collected by contacting operators to discuss matters raised by the checklist.

Step Three: Interpretation

Completing the Destination Performance Summary

Interpreting the data involved transferring all data from the evaluation phase to the Performance Summary. (For the completed Performance Summary see page 82). Achieving this Premier-Ranked status required a yes response for each of the three dimensions referenced earlier: Product, Performance and Futurity.

With this summary, it was possible to identify potential responses to the destination's weaknesses and create suggestions/options for future tourism development. Muskoka's strengths, market trends and opportunities and the competitive context in which the destination operates were also taken into consideration.

During this phase, the services of a consultant, Richard Innes of BrainTrust Marketing & Communications, were retained. Richard Innes is a knowledgeable and objective facilitator familiar with the PRTD process. He helped guide and articulate the summary of results, facilitate the development of the recommendations and provide an outline for this report.

During this phase:

- The MAP Team, along with the consultant, presented an initial summary of findings to the Advisory and Industry Committees for reactions and comments
- Additional work was undertaken to fill in information gaps and supplement initial findings. Some gaps could not be filled and therefore represented an opportunity - for example, it was determined that Muskoka has a gap with respect to information related to customer satisfaction and overall experience
- Preliminary recommendations were prepared.

Step Four: Industry Engagement & Final Report

Present Summary Findings, Recommendations, Final Report

During the final phase of the project, initial conclusions were shared and validated, recommendations were developed and endorsed and the final report was prepared:

- Several presentations to Advisory Committee and Industry Committees took place for additional discussion and comments and to formalize and approve the findings and recommendations that would be incorporated into the final report
- A final review and endorsement by the board of Muskoka Tourism - all of whom are tourism stakeholders - also took place before finalizing the report
- A final review and endorsement by the Investment Development Office of the Ministry of Tourism
- A community engagement strategy to roll out the final report was developed and implemented including:
 - Scheduled deputations to the District Municipality of Muskoka and all towns and townships in the region. Copies of the final report and executive summary were provided
 - Engagement of economic development officers/Chambers to share additional information/opportunities specific and relevant to each town and township. Copies of the final report and executive summary were also provided
 - A copy of the executive summary was mailed to all survey respondents while the Final Report was posted on the membership bulletin board of **discovermuskoka.ca**
 - Media relations activities were undertaken
 - Broader tourism industry engagement to be achieved through a Tourism Industry Forum to be held in the Fall of 2007.

accommodation

culture

events

trails

shopping

parks

festivals

dining

heritage

arts

Muskoka Starting from a Position of Strength



Muskoka A Premier-Ranked Tourist Destination

Muskoka Starting from a Position of Strength

A Compelling Destination with Significant Assets

The Premier-Ranked Tourist Destination process is designed to identify the areas where improvements are required. That being said, this work has been done against the backdrop of a destination that is starting from a position of strength. These include:

- An established tourist destination with a number of core attractors
- A strong combination of tourism assets that are currently generating overnight visitation
- Close proximity to a market of over 7 million people within a 3-hour drive of the destination.

Source: Stats Canada 2006.

- An industry committed to get to the next level
- Muskoka has a number of capable, committed and passionate organizations committed to growing tourism within their own communities and to the region in general.

A Snapshot of Muskoka’s Tourism Product Today

Source: MAP Industry Survey 2006

Accommodations

Muskoka offers a wide variety of accommodations in a range of price-points.

Roofed Accommodations	# of businesses	# of rooms
B&B’s	57	161
Cabins & Cottages	28	209
Motel - Individual	21	354
Motel Chains	5	271
Hotels	6	236
Lodges	9	120
Resorts	43	2,075
Totals	169	3,426

In addition, the region features:

- 29 Tent/Trailer/RV parks offering over 2,400 sites
- 34 children’s camps



On the Water

The Muskoka Watershed extends over an area of 4,660 square kilometers and encompasses the District of Muskoka and the Western edge of Algonquin Park. There are over 2,000 lakes in the watershed and they cover 17% of the total area. (Source: Muskoka Watershed Council). There are over 60 waterfalls in the region, which gives Muskoka the distinction of being the waterfall capital of Canada.



The region also has the following inventory of water-based features and products:

- 42 public beaches
- 49 marinas
- 52 sport fishing opportunities (includes accommodators who offer fishing and other businesses who provide guided fishing experiences).
- 16 ice fishing opportunities
- 22 businesses offering sight seeing cruises
- 18 sailing & 8 board sailing businesses
- 53 businesses offering power boat rentals
- 68 boat launches
- 182+ docking slips for transient use at area Marinas
- 75+ municipal public day-use docks
- 14 waterskiing opportunities
- 37+ canoeing/kayaking opportunities
- 8 popular scuba diving locations
- 60 popular waterfall, rapids, and chutes



On Land

Trails



The following are counts of those trails in Muskoka that are maintained by a trail group, private business or government agency. Other trails that may exist on crown land are not included here.

- 50+ hiking trails, spreading over 600 km. Many of these are multi-use and are great for snowshoeing or back-country skiing in the winter.
- 21+ cross country ski trails, spreading over 250 km
- 25+ mountain biking trails, spreading over 250 km
- 4 popular equestrian trails
- Over 1,600 km of groomed snowmobile trails

Wildlife

The region also features:

- 10 businesses offering hunting
- 6 businesses offering bird watching
- 14 outfitters offering a variety of activities
- 2 wildlife centers

Natural Resources



- 1 National park
- 11 Provincial parks
- 173,002 hectares of crown land
- 15 conversation areas/natural reserves
- 76 Municipal Parks

Cultural and Heritage Resources



- 2 National Historic Sites: Bethune House and Trent-Severn Waterway
- 20 Provincial Heritage Sites
- 32 Local Heritage Sites
- 5 Aboriginal Heritage Sites
- 14 Living History Sites
- 64 Arts/Attractions/Heritage businesses
- 12 Museums

Retail



There are over 316 retail businesses that reported they served tourists. This number does not include big box or chain stores. Of these, 184 are themed retail. A sampling of the shopping available in Muskoka includes:

- 59 high-end/unique retailers
- 15 antique shops
- 7 purveyors of Arts & Crafts.
- 41 Galleries
- 7 Farmers Markets
- 15 Agri-tourism businesses

Festivals and Events



Muskoka has over 130 Festivals, Events and Celebrations each year. A sample of these include:

- 13 Crafts Events
- 6 Santa Clause parades
- 5 Winter Carnivals
- 1 Easter bonnet parade
- 16 Studio/Garden/Architecture Tours
- 8 Theatres offering live performances
- The Bala Cranberry Festival has been awarded “Top 50 Festivals” - 4 years running

Food and Beverage



Muskoka offers a variety of dining experiences in over 130 establishments, although some are only open seasonally.

- 58 Fast Food
- 60 Mid-Price
- 12 Fine Dining

Of the 54 respondents who filled out a Food and Beverage Survey, the following interesting information was gathered:

- 22 (35%) offer take-out boxed lunches for tour groups, some serving over 1,000 annually.
- 28 (61%) accept reservations
- 11 have over 25 labels of wine on their menu
- An inventory of over 71 accredited chefs
- 46 (69%) serve locally-produced food and/or beverage products
- Culinary programs offered include cooking schools, apprenticeship programs, team building workshops and wine/beer seminars

Sports and Recreation



- 2 Jr. A Hockey Teams (located in Huntsville and Gravenhurst)
- 2 municipal and 3 resorts with indoor swimming pool facilities
- 12 Playing fields (not including school facilities that are often used by leagues)
- 8 Arenas
- Over 30 Golf Courses
- 6 Equestrian Facilities
- 1 Alpine/snowboarding

Development

- 9 Cross Country Ski Centers
- 1 Snow Tubing Park
- Major sporting events have included: Annual National Pond Hockey Tournament, Muskoka Triathlon, Muskoka Bassmasters Fishing Tournament; Winter Paralympics

Flora and Fauna



- 250 species of birds
- 50 kinds of mammals
- 25 unique reptiles and amphibians
- An abundance and diversity of botanical species including 420 which are classified as rare
- Some of the most popular species associated with the region are the Moose, Bear, Deer, Loon, Blue Heron, Osprey and the Eastern Massassaga rattlesnake

Firsts

Muskoka is home to many firsts including:



Torrance Barrens: a Conservation Reserve consisting of 1,990 hectares of crown land which is administered by the Province of Ontario. The first of its kind in Canada, the Torrance Barrens is now officially recognized as a Dark Sky Reserve.



Georgian Bay Littoral Biosphere: designated as a World Biosphere Reserve by the United Nations Educational, Scientific and Cultural Organization (UNESCO). Covering an area of 347,000 hectares, the reserve includes the extensive shoreline, open water and adjacent mainland that make up the eastern coast of Georgian Bay.



Canadian National Pond Hockey Championships: The first annual National Pond Hockey Tournament was held at Deerhurst Resort in 2006 and has grown from a single weekend to two weekends with over 1,200 participants. Plans for the 2008 tournament are already underway.

One of a Kinds

There are a number of truly unique attractions serving Muskoka. Following are five of them:



R.M.S. Segwun: Built in 1887, the Segwun is North America's Oldest Operating Steamship. Originally a paddlewheeler, the Segwun sailed

the Muskoka lakes from early spring to late fall, carrying passengers, mail and freight to the many resorts and villages not served by the railways. In the 1970's, the Segwun was restored and on June 1st, 1974, was officially launched at a ceremony with Prime Minister Pierre Elliott Trudeau.



Muskoka Heritage Place: Home to Muskoka's Pioneer Village and the Huntsville/Lake of Bays railway featuring the Portage Flyer Steam train.



The Wall in Port Carling: The world's largest photo mosaic



Santa's Village: Muskoka's original family theme park, built in 1955. Located on the 45th parallel, halfway between the north pole and the Equator, Santa's Village is known in Ontario as Santa's summer home.



Algonquin Park: Established in 1893, Algonquin is Ontario's largest Provincial Park spans 7,630 square kilometres of forests, lakes, and rivers. It was first discovered by fishermen but then by the Group of Seven and artist Tom Thomson.



*small towns
& villages*

outdoor recreation

resorts

water

cottaging

*culture
& heritage*

Assessing Muskoka's Product, Performance and Futurity Dimensions

In Muskoka, six Distinctive Core Attractors have been identified:

1. Water-based Features & Activities
2. Outdoor Recreation
3. The "Resort" Experience
4. Small Town/Village Experience
5. Culture & Heritage Experiences
6. The "Cottage" Experience



Muskoka A Premier-Ranked Tourist Destination

Assessing Muskoka's Product, Performance and Futurity Dimensions

The Product Dimension Evaluation Rating for Muskoka



Almost - the affirmation can almost be made and supported - one to several key efforts/ investments will enable affirmation. For a complete description on why Muskoka received this rating, please see page 71.

The Product components, criteria, and measures address the features that enable a destination to offer a high quality tourist experience enabled through the destination's offerings of:

- Distinctive Core Attractions
- Quality and Critical Mass
- Satisfaction and Value

The following product characteristics reveal Muskoka's product attributes:

Distinctive Core Attractors

What is it about a destination's attractors that make it distinct? And how relevant are these attractors to market needs? The evaluation process has identified Muskoka's core attractors, their distinctiveness, and the nature and size of the visitor markets they will attract.

Core attractors should meet at least two of the following criteria:

- Attract a significant number of visitors annually
- Have a physical or historical link to the destination
- Be a destination landmark

In Muskoka, six Distinctive Core Attractors have been identified. They include:

- 1. Water-based Features & Activities**
- 2. Outdoor Recreation**
- 3. The "Resort" Experience**
- 4. Small Town/Village Experience**
- 5. Culture & Heritage Experiences**
- 6. The "Cottage" Experience**

1. Water-Based Features and Activities

There are just over 8,000 bodies of water in the Muskoka region including lakes, rivers and streams and there are almost 14,000 kilometres of beautiful shoreline to explore. These clean, sparkling waters are the primary reason the region has been attracting visitors to the area for over a hundred years. Then, as is now, North America's oldest operating steamships continue to ply the lakes as others continue to be restored. Classic boats and mahogany cruisers built locally by Ditchburn, Greavette and Minett-

Shields continue their proud heritage on the lakes.

The region also holds the distinction of being the waterfall capital of Canada with 22 waterfalls within the Bracebridge area alone. In fact, throughout the region there are over 60 waterfalls, chutes, dams and cascades to enjoy.

Water-based features and activities are some of the region's biggest assets and they provide a list of seasonal experiences for both mass and niche market



visitors to choose from. Canoeing, kayaking, sailing, power boating, sport fishing, sight-seeing boat/steamship cruises, water-skiing, windsurfing, swimming and scuba diving and snorkeling are just some of the activities to be enjoyed from Spring to Fall.

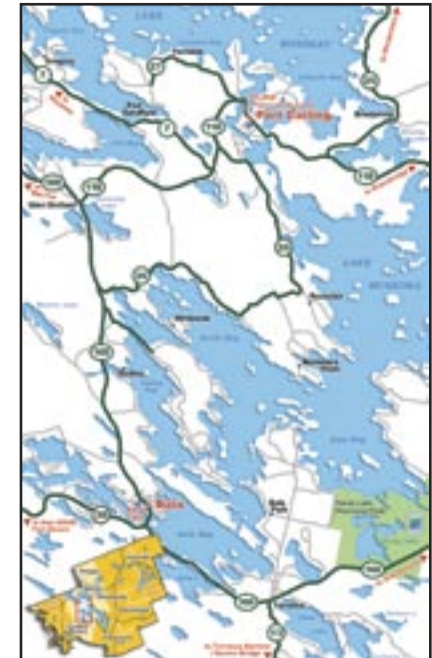
In winter when the ice forms on the lakes, visitors can experience Muskoka's waterways in a completely different way by snowmobiling, cross-country skiing, snow-shoeing, ice fishing, dog sledding and skating. Visitors can also enjoy truly Canadian winter pastimes such as attending a pond hockey championship; a snowmobile puddle-jumping competition or horse-drawn sleigh ride.

There are over 68 boat launches, 75 public docks and 182 transient boat slips located throughout the region and Marina's abound. Enjoying a picnic is also a favourite activity where visitors can access over 76 public parks, many with beaches.

Throughout the region, water-based events run the gamut from the Antique and Classic Boat Show and Dragon Boat Festival to other lakeside celebrations, fireworks, regattas and other special events.

Virtually every town and township in Muskoka is located on or very near a body or bodies of water.

Muskoka Lakes



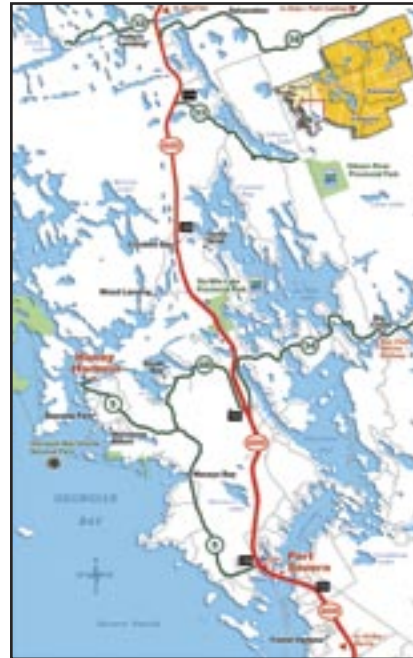
At the heart of the Township of Muskoka Lakes are three of Muskoka's largest and best-loved lakes: Muskoka, Rosseau and Joseph. The waters of Lake Muskoka head for Georgian Bay via the Moon River through Bala and the Bala falls are a popular place for photographers. At the locks in Port Carling, visitors gather to watch the boat traffic pass by on their way between Lake Muskoka to Lake Rosseau. This area also offers circle tours with vistas of the many lakes in the area.

Lake of Bays

The Township of Lake of Bays has one of the largest lakes in Muskoka: the Lake of Bays. Striding the dam at the head of the South Muskoka River, Baysville features a fully revitalized waterfront and is located on the south shore of the Lake of Bays. Dwight offers the much photographed Ragged Falls and a sand beach right in the centre of town, while Dorset with its infamous look-out tower offers some of the most spectacular views of Muskoka and the fabulous Lake of Bays.



Township of Georgian Bay



Georgian Bay features the serenity of inland lakes, a historic navigable waterway of locks, lakes and rivers and the only area of Muskoka that includes the unique coastline of Georgian Bay with its recreational waters and the southern portion of the 30,000 islands. The latter area forms part of the world renowned Heritage Coast and was recently designated by UNESCO as part of the Georgian Bay Littoral Biosphere Reserve, one of less than 500 such special places in the world.

Port Severn is a gateway lock on the Trent-Severn Waterway - a national historical site. A trip upstream takes visitors to the historic Big Chute Marine Railway where you can still see the original single boat carriage that brought craft up over the 18-metre rise of land between the river and the Gloucester Pool. In the Northern part of the township, the region can be traversed by the rivers of the Muskoka River watershed, while the southern boundary is formed by the Severn River watershed, both of which flow into Georgian Bay.



Huntsville



Huntsville features Mary, Vernon, Peninsula and Fairy Lakes, the latter of which features a unique floating boardwalk across Hunter's Bay. The historic downtown area also has an old swing bridge that links Lake Vernon and Fairy Lake while the canal between Peninsula and Fairy Lake is a favourite spot to have a picnic. Plans are currently underway for a rejuvenated waterfront.



Bracebridge

Bracebridge is unique in that, the north and south branches of the Muskoka River meet here and after some spectacular falls, some of which are right in town, the river continues to meander slowly into Lake Muskoka. A wonderful historical walk can be enjoyed in Bracebridge Bay Park and sections of the Trans-Canada Trail run right along the river and through town. High Falls offers the region's only natural water park.



Gravenhurst



Gravenhurst provides a gateway to Lake Muskoka and Gull Lake and both lakes are located within a short walking distance of one another right in town. A beautifully rejuvenated waterfront at the Muskoka Wharf offers outstanding lakeside activities, a restored fish habitat, boardwalk and hiking trails. It is also home to North America's oldest operating steamship and a new museum dedicated to telling the history of boat builders in the area. The museum also features a large in-water display of antique and classic boats. Just south of Gravenhurst, in Severn Bridge, boaters can access the Severn River, which will take boaters out to Georgian Bay via the Trent-Severn Waterway.

2. Outdoor Recreation

With over 4,760 square kilometres of land, 60% of which is protected crown land, Muskoka offers a diverse range of outdoor activities in spectacular settings in all four seasons.

Outdoor Activities

As a core attractor, outdoor recreation is a cluster of many activities that appeal to both mass and niche markets providing a year-round draw. Golf, camping, hiking, horse back riding, biking, rock climbing, downhill/cross-country and water skiing, snowmobiling, snowshoeing, skating, and of course a full complement of water-based activities such as sport/ice fishing, swimming, canoeing, kayaking, power boating, wake boarding, wind surfing and sailing to name a few.

Wildlife Viewing

Wildlife viewing is abundant with over 250 species of birds, 50 kinds of mammals and 25 unique reptiles and amphibians. The Muskoka Wildlife Centre and Guha's Lions and Tigers offer a broad spectrum of enclosed wildlife viewing, while unpenned wildlife can be viewed in anyone of the region's many parks. Canada's oldest and most famous wilderness park, Algonquin, with its 7,700 square kilometres of protected forest, lakes, rivers and hills is right on Muskoka's doorstep and offers opportunities for wildlife viewing.

Parks and Reserves

Altogether, there is 1 national park, The Georgian Bay Islands National Park, 11 Provincial parks, including Algonquin Park, the largest provincial park in the province and 15 conservation areas/reserves in the region. Muskoka Lakes is also home to the world's first dark sky reserve at the Torrance Barrens ... a great destination for astronomers and star gazers alike. The Echo Valley Observatory in Huntsville is another great place for deep sky viewing and expert instruction in Astronomy. There are also 76 municipal parks/picnic grounds, many of which feature sand beaches.

Georgian Bay Littoral Biosphere

Eco-tourism at it's best: Georgian Bay and the 30,000 islands form part of the world-renowned Heritage Coast and was recently designated by UNESCO as part of the Georgian Bay Littoral Biosphere Reserve, one of less than 500 such special areas in the world.

Hiking, Cycling and Horseback Riding

There are over 50 hiking trails in the region. Ranging in length from half a kilometre to over 40 kilometres in length, the Muskoka trails network offers a hiking experience for every skill level from beginner to expert. Six riding centres offer equestrians a chance

to experience Muskoka on horseback. Gentle bicycle routes are available while more extreme mountain bike riding can be experienced at facilities such as Buckwallow Cycling Centre.

Campgrounds/RV/Trailer Sites and Children's Camps

There are 2,100 tent/trailer/RV sites in Muskoka available at a wide variety of price points. Kids camps are also plentiful with over 34 operating seasonally and offering traditional camp programs. Some, such as Muskoka Woods, successfully operate year round due to their outstanding curriculums.

Fishing

Currently there are 52 businesses offering sport fishing. Guide services allow visitors to access many of the lakes in Muskoka via boat in the 3 warmer seasons. Ice fishing is also growing in popularity and ice hut rentals and other gear is available at 16 area establishments. The most popular species that angler's seek out in Muskoka are Northern Pike, Walleye/Pickerel, Largemouth Bass, Smallmouth Bass, Lake Trout, Brook Trout, and Muskie.





Snowmobiling and other winter sports

In winter, snowmobilers can access 1,600 kms of groomed trails in the region along with downhill skiing at Hidden Valley and over 250 kilometres of packed and track set cross-country ski trails throughout the region. Snow shoeing can be done virtually anywhere and Rock Ridge Recreation Park offers 6 tube runs as well.

Sport Tourism

Recent successes in sport tourism include the Winter Paralympic Games and the National Pond Hockey Championship that takes place in Huntsville each year. Triathlons are also proving to be big business.

Golf

Muskoka is one of North America’s great golf destinations. With its dynamic topography and stunning scenery, golf in Muskoka offers many unique experiences. With their narrow-tree-lined fairways, sloping greens that wind through granite outcrops, challenging water hazards, dramatic links and beautiful lake vistas, Muskoka inspires golfers at all levels. There are over 30 public and private golf courses in the region many of which have earned great acclaim and have been created by leading course designers such as Thomas McBroom, Mark O’Meara and Nick Faldo to

name a few. Frequently these golf courses have wonderful dining rooms that offer outstanding culinary experiences conceived by top chefs. Others offer excellent golf programs for youth, and one course even offers a simulated golf experience year-round

Less Strenuous Pursuits

Photography, painting and garden tours are three less strenuous outdoor activities that can be enjoyed by niche

markets. The natural beauty of the area is a draw for artists while gardeners can tour unique settings such as Dyer’s Memorial or locations that include art installations such as The Artful garden or The Tree Museum. Painted mural tours are also available in several communities and unique attractions such as “The Wall” in Port Carling are great outdoor activities for those looking for less strenuous enjoyment of the outdoors.



3. The “Resort” Experience

There is no destination in Ontario that can rival Muskoka for the sheer volume of resorts found in beautiful waterfront settings. There are 169 accommodation properties in the Muskoka region of which 80 offer “resort” experiences, whether at a high-end, full service resort, traditional Muskoka lodge or charming cabin or cottage resort.

Indeed, “the resort experience” is defined in different ways by different market segments. While some visitors want to enjoy luxurious accommodations, fine dining with award-winning chefs, spa and golf experiences, others may define their desired resort experience as comfortable, cottage-like accommodations with efficiencies or great meals served in a lodge with a wide range of family activities to choose from. To others still, the experience may mean staying in a wilderness cabin without the intrusions of modern life.

The resort experience, and indeed the tourism industry in Muskoka as a whole, was born of necessity. Originally settled in the late 1880’s, through the Free Land Grant and Homestead Act of 1868, many hopefuls came to Muskoka believing that an area with such a bounty of forests would be an excellent place to

farm. Little did these early settlers know that beneath the soil lay the 1.5 billion-year old granite of the Canadian Shield. Rather than farm the unforgiving land, some turned to lumbering while others turned to tourism - initially offering hunters and fishermen accommodations. Hence, the tourism industry was born.

The steamships made it possible to develop remote areas of the lakes and the first Muskoka summer luxury wilderness resort, know as Rosseau House, was built by William Pratt. Windermere House started as the family home of Thomas Aitkens who initially provided accommodation to sportsmen. Clevelands House was built by Charles James Minett. It was originally called Cleeve Land after the name of the village Cleeve in England where Minett came from, but when the hotel was having its first register printed, the name was misspelled and has been called Clevelands House ever since.

Many of the early resorts have now closed, were lost to fire or in a few cases, are in the process of becoming fractional ownership properties. Many of the original resorts from the turn-of-the-century continue to operate today, some of them by the same families, which further enriches



the history and enjoyment of these wonderful properties. Examples:

- Deerhurst Resort - Est. 1896, original lodge still standing
- Cleveland’s House Resort - Est. 1883, original still used
- Windermere House - Est. 1870, burned in 1996 but rebuilt to mirror the original in 1997.
- Sherwood Inn - Est. 1939



- Delawana Inn Resort - Est. 1897
- The Inn at Christie's Mill - Est. 1920's. Originally a fishing camp. Became a resort in the 1940's after the war.
- Rawley Lodge Country Inn and Resort - Est. 1922
- Severn Lodge - Est. 1920's. Originally known as the Mordolphton Camp but has been owned by the same family since 1937.
- Billie Bear Lodge Cottage Resort - Est. 1906
- Pine Lodge - Est. 1927
- Patterson Kaye Lodge - Est. 1936
- Logging Chain Lodge - Est. 1947
- Pinedale Inn - Est. 1910
- The Severn River Inn - the oldest operating Inn in Muskoka

originally built in 1858, destroyed by fire in 1906 and rebuilt in 1907.

- The Bala Bay Inn - Est. 1910.

Today, several new developments such as Red Leaves will incorporate Clevelands House, Canada's first J.W. Marriott Resort, a spa, The Rock golf course and Minett Landing and a waterfront pedestrian village which will also house the Red Leaves Play House. A grand resort with a grand vision, Red Leaves will raise the resort experience in Muskoka to a whole new level.

Similarly, in Gravenhurst, the new Muskoka Wharf not only pays tribute to the history of the steamships and great boat builders in the area, but Muskoka's Boat & Heritage

Centre features an exhibit recalling the magnificent resorts of the past. This is brought to life with artifacts and interactive exhibits of the Royal Muskoka Hotel built by the Muskoka Navigation Company at the turn of the century. The Wharf will also feature a Marriott Residence Inn - a more modern twist on the resort experience.

A resort experience for pets, too

Recognizing that many visitors want to include their pets in their vacation plans, there are a number of accommodators in the region who welcome pets. Other enterprising operators have built entire businesses around the concept of a resort specifically for furry family members. The Happy Tails Pet Resort and Muskoka Spa for Pets are two such operations.



4. Small Town/Village Experience

Animated public spaces, interesting architecture and quaint main streets, many of which are located on waterways, provide a lovely backdrop for walking tours and shopping in the historic downtown areas of our towns and villages. These include: Huntsville, Dwight, Dorset, Baysville, Port Sydney, Utterson, Windermere, Rosseau, Minett, Port Carling, Bala, Bracebridge, Gravenhurst, Severn Bridge, Port Severn, Honey Harbour and MacTier.

The personality of the region is also expressed in locally-influenced independent tourism or tourism-related businesses. There are over 316 merchants in the region serving tourists, and shops run the gamut from antique and consignment shops, bookstores, home décor and giftware, ice cream parlours, canoes and kayaks, general stores, outfitters, fashion and accessories, galleries and jewellery shops, bakeries, restaurants, pubs, coffee shops/delis and tea rooms. Many offer truly unique products and experiences. Some examples are shown at right:



- Robinson's General Store,
- Walter Page's Muskoka and Georgian Bay Stores
- The Muskoka Trading Post
- Rich Hill Candles
- The Cranberry Store at Johnston's Cranberry March
- Swift Canoe and Kayak
- Algonquin Outfitters
- Muskoka Outfitters
- Muskoka Paddle Shack
- The Scuba Shack
- Silver Bridge Gallery
- Generations Antiques
- The Yellow House Antiques
- The Old Palmer House
- Plug Nickle Antiques
- Peaks and Rafters
- Muskoka Living Interiors
- Hilltop Interiors
- Birds of Muskoka
- Maple Orchard Farms
- Muskoka Bear Wear
- Due North Apparel
- Muskoka Bear Wear
- Muskoka Bay Clothing
- Simple Chic
- Robertson's
- Irvine Fine Foods
- The Woodmill of Muskoka
- Seven Main and Muskoka Roastery
- The Muskoka Chair Company
- Three Guys and a Stove
- Rebecca's Casual Fine Dining
- Riverwalk
- Marty's World Famous Café
- The Moon River Lookout



Visitors have the opportunity to learn about Muskoka’s rich history through guided walking tours and slide presentations provided by individual resorts and historians who cater to groups. Many towns also offer self-guided tours. For example, Huntsville offers an outdoor gallery and walking tour featuring Group of Seven paintings recreated on the sides of buildings in the historic downtown area; Gravenhurst offers a self-guided walking tour where murals depict the history of the town. In Bracebridge, an historic heritage walk takes you along the streets first settled as Bracebridge expanded.

Flower boxes, hanging plants, night-sky-friendly and seasonal lighting and tasteful banners grace the streets of many of Muskoka’s towns. Waste receptacles and park benches can be found everywhere ... some of them thoughtfully provided by non-tourist-related businesses and even private citizens.

There are fifty-seven Bed & Breakfast (B&B) establishments operating in Muskoka, many of which are located in turn-of-the-century homes or truly unique properties with unusual architecture or interesting previous uses. Their hosts offer guests unique insights into local history and a truly personal touch. B&B’s represent almost 8% of the total roofed

accommodation in Muskoka with over 161 rooms and contribute a great deal to the “small town” character of the communities in which they do business.

Museums and local attractions also add to the uniqueness and appeal of Muskoka’s small towns and give visitors an opportunity to extend their stay. Bandshells, barges and even churches are pressed into service to provide concerts and public spaces are frequently animated with special events conceived by local Chambers of Commerce or Business Improvement Associations. Craft shows, parades, sidewalk sales, horse drawn carriage rides and lamplight tours and other festivals and events are just some of the ways that public spaces come alive and add character to the region.

Throughout the region, Farmer’s markets operate predominantly during the growing season (May to October). U-pick operations offer strawberries, blueberries and other locally grown fruit and in the Spring, the maple bush comes alive with demonstrations of maple syrup production. Several Agricultural fairs also take place in Muskoka’s towns and villages with the oldest of them all being the Severn Bridge Agricultural Society’s Annual Fall Fair. Established in 1873, the society will be holding its 134th annual Fall Fair in 2007.

Muskoka is also home to the only two commercial cranberry operations in Ontario including Johnston’s Cranberry Marsh and the Iroquois Cranberry Growers. Johnston’s, in Bala, is the oldest in the province and still family-owned and operated. It features a farm, trails, picnic grounds and a gift shop featuring cranberry gifts and products. It also home to the Muskoka Lakes Winery where QC –certified wines (the fruit wine Equivalent to VQA) made from cranberry and blueberry are made. Since 2001, these wines have won over two dozen awards.

The Lakes of Muskoka Cottage Brewery is a craft/micro brewery that features award-winning beer brewed in Muskoka and sold at the brewery, the LCBO and The Beer Store. A member of the Ontario Craft Brewers, Lakes of Muskoka won three silvers and a bronze at the 2006 Toronto Wine and Cheese Show.

From spring lamb to specialty mushrooms, cranberries, honey, maple syrup and garlic – there are a number of fresh ingredients grown or products produced in Muskoka. The SAVOUR Muskoka logo displayed at farm gates, retail locations and at farmers’ markets notifies visitors that they are selecting the freshest locally-grown or made products available.



5. Culture & Heritage Experiences

Adult couples, families and seniors are three of the market segments who are drawn to Muskoka's wide range of cultural experiences. This product cluster represents an often overlooked yet extremely important attractor in the region. It includes museums, historical sites, galleries, studio tours, musical and theatrical performances, exhibits and shows, walking tours and other festivals and events offering appeal to both mass and niche markets.

The breadth of talent in the area includes painters, potters, photographers, blacksmiths, stained glass artists, coppersmiths, glassblowers sculptures, carvers, jewellers, weavers, writers, composers, musicians, luthiers, dancers, actors, boat builders, paddle makers, graphic and architectural designers, calligraphers, art restorers, candle and soap makers, furniture and cabinet-makers and more. Art installations and performances take place in tents, on barges, in theatres, on rock, by the shoreline, in galleries, churches and even in the forest ... adding yet another layer of complexity for visitors looking for a truly unique cultural experience.

Museums of Muskoka

These designated heritage sites feature a wide range of styles and offer a variety of activities including tours, live re-enactments, living history activities, rotating exhibits, programs for interaction and learning, lecture series and more. There are 12 museums in the region including Bala's Museum with memories of Lucy Maud Montgomery, Bethune Memorial House, Dorset Heritage Museum, the Muskoka Boat and Heritage Centre, Muskoka Heritage Place, Muskoka Lakes Museum, Woodchester Villa and the soon to be built Muskoka Rails Museum. These museums offer experience in pioneer life, the history of boat building and steamships in the area, railway history, aeronautical, military history, medical innovation, logging practices, tourism and more.

In 2007, the District of Muskoka will also be opening the "Little Norway Memorial" at the Muskoka Airport commemorating the presence of the Royal Norwegian Air Force in Gravenhurst during the Second World War. The memorial will feature artefacts, flight officer's uniforms and a plaque containing the names of locally trained pilots who died during the war. Another mini-museum is planned beside Bressette House (Muskoka Tourism's visitor centre in Port Severn).

Galleries, Studio Tours and Art Events

The pristine lakes, sweeping granite and majestic boreal forests of Muskoka have long inspired artists, beginning with the beautiful landscapes painted by the Group of Seven.

Today, there is a thriving artist community in the region with 41 galleries and studios providing a venue to showcase their works. It is recognized that this inventory of artists only includes those who actively promote themselves. The reality is that there are far more artists who work in their homes/galleries who have not been included in this count. While some artists are independent, others have chosen to affiliate themselves with specific organizations such as the Arts Council of Muskoka (ACOM) and the Muskoka Arts Council (MAC).



The Arts & Culture product cluster is an often overlooked yet extremely important attractor.



There are three major annual arts tours in the region: The Muskoka Lakes Spring Art Tour; The Big Art Thing Studio Tour and the renowned Muskoka Autumn Studio Tour which combines visits to artist's studio with a wonderful autumn drive to enjoy the fall colours.

Interactive and creative experiences are also offered through experiences such as painting classes and twig chair building workshops to name a few, which are offered to both individuals and groups.

Frequently a pairing of the arts and culinary experiences have proven successful and can be witnessed in events such as Flavours of Muskoka or where individual accommodators have paired with local artists for a show and dining experience.



Theatre & Music

There are many theatrical and musical events that take place in Muskoka and they range from free to dinner theatre for \$42.50 per person.

Theatre and cultural facilities are flourishing. The Centre in Port Carling is home to the Muskoka Lakes Music Festival and other theatrical performances. With 336 seats, the Gravenhurst's Opera House provides a venue for live performances, fashion shows and other community events. The Algonquin Theatre in Huntsville, seating over 400, has a robust offering of performances with many name performers appearing during the Festival of the Arts and throughout the year.

Theatre Muskoka presents performances in a variety of venues throughout the region and the Muskoka Theatre project at Red Leaves is another group offering first rate theatre in the area.

The Kee to Bala has a 720 person capacity on their main floor and they offer a complete concert series each summer with popular artists such as Sam Roberts and David Wilcox.

Festivals and Events

Every year, a wide range of non-musical festivals and events take place in Muskoka drawing visitors from far and wide and mostly from Spring to Fall. Notable examples include:

- Cranberry Festival
- Dragon Boat Festival
- Antique and Classic Boat shows
- Antique, Custom and Classic Car Shows
- Dockside Festival of the Arts
- Doors Open
- Muskoka Arts & Crafts Show
- Model Railroad Show
- Art in the Park
- Antique Shows
- Fall Fairs
- Santa Claus Parades
- Winter Carnivals

Successful fundraising events or niche events also have the capacity to attract visitors to the Region. For example:

- Relay for Life, Canadian Cancer Society
- HBC Run for the Cure
- Trillium Tour 25- Kilometre Muskoka Car Rally
- Southern Cruiser Bike Ride
- Ribfests and Lobsterfests

6. The Cottage Experience



Muskoka has quite rightfully earned its reputation for being “cottage country”. One need only drive any of the back roads of Muskoka and you will be greeted with “sign post forests” - those way-finding signs strategically placed at forks in the road to guide visiting friends and family to the cottage. The image of a Muskoka Chair is another symbol that evokes memories of the region!

Cottaging is an experience sought by many and it draws visitors to Muskoka time and time again. Even if a family does not own a cottage, they can rent one, visit friends or family in the area who do own a cottage, or perhaps they will choose to stay at one of the region’s many cottage resorts. The cottage experience then, not only holds great potential to continue to attract new visitors but existing cottagers/second home owners are

also a lucrative market for many of the region’s tourism products including shopping, dining, marinas, golf courses, festivals and events, museums/historic sites, theatres/concerts, boat cruises and more.

According to the District of Muskoka’s Second Home Study, the region has an approximate total population of 128,381 with the seasonal population exceeding the permanent resident population by approximately 22,000 people or 59% of the population.

Of these seasonal residents, approximately 1.4% are from other provinces; 4% are from the U.S.; 0.4% are from other international locations and the balance reside in Ontario with 72.4% living in the golden horseshoe. (See table below)

The value of this market is substantial but not fully understood:

- Total avg. weekly expenditures \$614*
- 44% residence are winterized*
- 72% reside/come from the Golden Horseshoe*
- 92% don’t rent their cottage*
- Host an avg. of 84 visitor nights annually, 1.7 million visitor nights in total

*Source: 2004 Second Home Study



Seasonal Population Estimates & Total Population*						
	Total # Seasonal Dwellings	Average # persons per household	Population Breakdown			
			Estimated Seasonal	Permanent (2001 Census)	Total Population	% Seasonal
Bracebridge	1,968	3.59	7,065	13,751	20,816	33.9%
Georgian Bay	4,023	3.65	14,684	2,176	16,860	87.1%
Gravenhurst	3,036	3.60	10,930	10,889	21,829	50.0%
Huntsville	1,674	3.72	6,227	17,338	23,565	26.4%
Lake of Bays	3,160	3.62	11,439	2,900	14,339	79.8%
Muskoka Lakes	6,706	3.72	24,946	6,042	30,988	80.5%
Muskoka	20,567	3.7	76,098	53,106	129,204	58.6%

Total may not equal the sum total of area municipalities due to rounding.

Quality and Critical Mass



This section addresses the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging in core and related activities as well as entertainment, dining, and shopping. The evaluation process has assessed the size of Muskoka’s activity and amenities base and the quality of its entertainment, dining and shopping offerings.

Muskoka offers visitors many interesting and compelling experiences that are considered to be memorable on their own or as a cluster of experiences. This would include the physical setting of Muskoka with towering pines, hardwood forests, lakes, rivers, waterfalls and rock outcroppings. The natural environment is also rich in

flora and fauna with many opportunities to view wildlife throughout the region. There is a strong tourism history in the region with the presence of traditional resorts, lodges and inns.

The towns and villages also have unique streetscapes and most are located on waterways. Many of the seasonal cottage owners have constructed unique boathouses that have become identifiable with the region. There are a great number of artist’s galleries and studios. Many artists capture the uniqueness of Muskoka in their work, seen as natural wildlife, landscapes, docks, boats and the famous Muskoka chairs.

All these factors contribute to making the destination memorable.



Core and On-Theme Activities

The combination of Muskoka’s overall offering of core attractors and the number of on-theme activities that exist, contributes to visitors remaining in the district for periods greater than 24 hours. The average length of stay in Muskoka is 3.98 days*. Some examples of these activities are listed below:

Activity	Duration
Golf	4-5 hours
Boat Cruises	1-5 hours
Studio/Gallery Visits	1-4 hours
Cross Country Skiing	1-2 hours
Mountain Biking/Hiking	1-2 hours
Fishing	1-5 hours
Boating	3-5 hours
Sightseeing	1-5 hours
Attending Cultural Performances	3-5 hours
Shopping	2-3 hours
Snowmobiling	3-5 hours
Historical/cultural Centre/ Museums	1-2 hours

*Source, PRTD Industry Survey, 2006.



Many of Muskoka’s core experiences are available on a year-round basis and therefore provide opportunities to extend traditional peak travel times into the shoulder seasons. The challenge for the area is that the options for shopping, dining, and in particular accommodations are greatly reduced in the “off season” (November - March).

Activity	Season
Water Based	
Boating	Late Spring, Summer, early Fall
Boat Cruises	Late Spring, Summer, early Fall
Canoeing/Kayaking	Late Spring, Summer, early Fall
Grace and Speed	Year Round
Fishing	Spring, Summer, Fall
Ice Fishing	Winter
Skating/Pond Hockey	Winter
Land/Nature Based	
Hiking/Biking	Spring/Summer/Fall
Cross Country Skiing/Snowshoe	Winter
Sightseeing	Year Round
Resorting	Seasonal and Year Round
Small Town/Villages	Seasonal and Year Round
Arts/Culture	Seasonal and Year Round
Artist studios	Seasonal and Year Round
Galleries	Seasonal and Year Round

Source: MAP Industry Survey 2006

Most of Muskoka’s on-theme experiences are not available on a year-round basis.

Activity	Season
Dining Restaurants	Open seasonally in some towns /townships Most are only open seasonally
Museums, Heritage Sites, Walking Tours, Shopping	Seasonal or Year Round with limited hours in winter
Marinas, Boat supply	Spring/Summer/Fall
Golf	Spring/Summer/Fall
Wildlife viewing	Year Round
Santa’s Village	Summer only

In the roofed accommodation sector only 69% of the 169 accommodation partners surveyed operate year-round.

Roofed Accommodations Seasonality	Number of businesses	Open Year Round	
		Number	Percentage
B&B’s	57	47	82%
Cabins & Cottages	28	6	21%
Motel - Individual	21	20	95%
Motel Chains	5	5	100%
Hotels	6	6	100%
Lodges	9	6	67%
Resorts	43	26	60%
Total	169	116	69%



Purchasing Muskoka’s Product

Muskoka’s products are not easily accessed or purchased from **outside** the region. Accommodations can be pre-arranged; however tickets or admissions to attractions, tours, cultural and recreation events or activities need to be booked on-site for the most part. For example:

- 93% can be booked onsite
- 12% offer multiple points of purchase through other third parties
- 39% showcase their products via the internet but this does not necessarily mean these operators have online reservation systems.
- 17% via a toll-free number.

The primary website for the region is **www.discovermuskoka.ca** which offers a wealth of information on things to see and do, places to stay, maps and event listings. There are also a number of websites providing additional information on each town and township. These websites are generally hosted by the towns and townships or local chambers of commerce. In all cases, reciprocal links are essential to aid the visitor in navigating from one site to another with ease. Currently, none of these sites offer the functionality of a trip planning tool or “shopping basket” to aid in pre-planning and none offer online reservation systems to allow tourists to pre-book and pay.



In addition, there are a number of other websites operating in Muskoka, which further compete with the aforementioned “official” tourism websites (for example: **www.muskoka.com**; **www.traveltomuskoka.com**; and

www.visitmuskoka.com) The proliferation of this type of website may be problematic in that they confuse visitors as to whether they have arrived at an “official” destination web site or a simply a “commercial” web site.

Experiences Available at a Wide Range of Price Points

Muskoka’s products and experiences are available to visitors at a variety of price points, the range being from free to \$600.

Culture Related Business Sampling	Type	Minimum	Maximum
Annual Summer Members Show Muskoka Arts & Crafts	Donation		
Back Country Studio	Free		
Bethune Memorial House (Parks Canada)	Set Fee		\$3.95
Damery Fine Art	Free		
Dorset Scenic Lookout Tower	Free		\$3.00
Eliz Studio	Free		
Gina Denne Pottery	Free		
Grace and Speed, Muskoka Boat & Heritage Centre	Set Fee		\$8.50
Lady Muskoka Cruises	Set Fee	\$23.00	\$36.00
Muskoka Bay Pottery	Free		
Muskoka Inspirations in Watercolour	Free		
Muskoka Lakes Museum Port Carling	Donation		
Muskoka Lakes Music Festival	Free	\$25.00	\$60.00
Muskoka Place Gallery	Donation		
Muskoka Rails Museum	Donation		
Santa’s Village & Sportsland	Set Fee		\$20.00
Studio In The Glen	Free		
Tapawingo Studio	Free		
The Alexandra Luke Gallery	Free		
Watershed Photo Gallery	Free		
Wood’s End Studio	Free		
Woodchester Villa	Set Fee	\$2.00	

Festivals Sampling	Type	Minimum	Maximum
Shades of Autumn Classic Car Show, Summer sidewalk adventure	Free		
(Who Art Thou? A Mystery Art Sale) Muskoka Arts & Crafts Inc.	Donation		
Annual Downtown Huntsville Summer Sidewalk Adventure	Free		
Annual Muskoka Antique Show	Set fee	\$5.00	\$7.00
Annual Spring Member's Show Muskoka Arts & Crafts Inc.	Donation		
Annual Trek to Bethlehem	Free		
Bala Cranberry Festival	Set fee		\$5.00
Bala Santa Clause Parade	Voluntary		
Bala Summer Market	Free		
Baysville classic Antique Boat Show	Voluntary		
Bracebridge - Santa Claus Parade	Free		
Bracebridge Antique Show	Set fee		\$5.00
Bracebridge Fall Fair	Set fee		\$5.00
Christmas in July	Free		
Dorset Recreation Centre - Snowball Winter Carnival	Voluntary		
Dwight Winter Carnival	Set fee		\$3.00
Gravenhurst Antique Car Show	Donation		
Gravenhurst Docksides Festival	Donation		
Gravenhurst Native Celebration	Set fee	\$3.00	\$4.00
Group of Seven Outdoor Gallery & Walking Tour, Downtown Huntsville	Free		
Huntsville Canada Day Celebrations	Free		
Huntsville Fire Fly Festival	Free		
Memorial Park Band Shelter Concerts Town of Bracebridge	Free		
Muskoka Lakes Music Festival	Set fee	\$25.00	\$60.00
Muskoka Pioneer Power Association	Set fee	\$5.00	
Muskoka Woodworking Show Lions Club of Bracebridge	Set fee	\$5.00	\$7.00
Port Carling Winterfest	Voluntary	\$5.00	





Nature/Outdoor and Water Based Activities Sampling	Type	Minimum	Maximum
Algonquin Prov. Park Day-Pass	Set Fee	\$8.00	\$16.00
Alpine Skiing at Hidden Valley without rentals	Set Fee	\$25.00	\$42.00
Alpine Skiing/Snowboarding at Hidden Valley with Rentals	Set Fee	\$54.00	\$71.00
Arrowhead Provincial Park Day Pass	Set Fee	\$8.00	\$16.00
Aspen Valley Wildlife Sanctuary	Donation		
Astronomy Program, Echo Valley Observatory	Set Fee		\$25.00
Beach/Lake Swimming	Free		
Boat Cruise (Segwun, Wenonah, Lady Muskoka)	Set Fee	\$16.00	\$42.00
Canoeing/Kayaking Rental	Set Fee	\$20.00	\$40.00
Canoeing/Kayaking Rental Guided - 2-hour outing	Set fee		\$250.00
Canoeing/Kayaking with own Equipment	Free		
Cross Country Skiing Trail pass	Set Fee	\$ 7.00	\$10.00
Cross Country Skiing with Rentals	Set Fee	\$12.00	\$18.00
Dog Sledding	Set Fee	\$ 65.00	\$225.00
Fall Drives	Free		
Fishing Charters	Set Fee	\$280.00	\$600.00
Horse Drawn Sleigh Ride	Set Fee	\$10.00	\$75.00
Ice Fishing	Set Fee	\$12.00	\$25.00
Maple Syrup Tour	Set Fee	\$15.00	\$20.00
Mountain Bike Rentals	Set Fee	\$25.00	\$35.00
Mountain Bike Trail Day Pass	Set Fee	\$12.00	
Nature Trails	Free		
Power Boat Rental	Set Fee	\$145.00	\$500.00
Rock Ridge Recreation Tube Ride	Set Fee	\$3.00	\$20.00
Scuba Diving	Set Fee		\$99.00
Sight Seeing	Free		
Snowmobile Guided Tour 2-hour	Set Fee		\$199.00
Snowmobile rental	Set Fee	\$250.00	\$300.00
Snowshoeing rentals	Set Fee	\$20.00	\$25.00
Torrance Barrons	Free		
Waterskiing/Wakeboarding	Set Fee	\$25.00	\$50.00
Dorset Tower	Set Fee		\$3.00
Hummer Ride	Set Fee	\$30.00	\$50.00

Golf Sampling	Cost / 9 Holes			Cost / 18 Holes			
	Peak	Twilight	Off Season	Peak	Twilight	Off Season	Other
The Rock Golf Club				\$140	\$99	\$99	\$69
South Muskoka Curling & Golf Club	\$30			\$60	\$44		
The Diamond in the Ruff	\$42	\$30		\$69	\$30		
North Granite Ridge Golf Course	\$35	\$25	\$25	\$60	\$40	\$40	
Huntsville Downs Golf Ltd.	\$40	\$25	\$25	\$64	\$40	\$42	
Deerhurst Resort - Lakeside				\$65	\$50	\$50	
Muskoka Highlands Golf Links	\$30	\$20	\$20	\$45	\$30	\$35	
Muskoka Bay Club				\$155			\$140
Muskoka Woodlands Golf Course	\$28			\$42			
Taboo				\$195	\$125	\$146	\$180
Bigwin Island Golf				\$210	\$170	\$150	\$150
MIN	\$28	\$20	\$20	\$42	\$30	\$35	\$69
MAX	\$42	\$30	\$25	\$210	\$170	\$150	\$180
Average	\$34	\$25	\$23	\$100	\$70	\$80	\$135

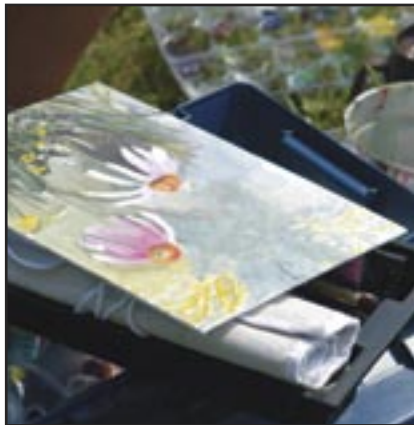
Source: MAP Industry Survey 2006 (Based on 2006 pricing)



Muskoka Offers Layers of Added Value

Muskoka offers visitors a range of activities encompassing a variety of price points and layers of added-value. These activities include product experiences that provide opportunities for relaxation, entertainment, interpretation, education, cultural or historic understanding, skills development and adventure. The range of these activities is not as widely promoted as they could be and therefore may not be top-of-mind for potential or existing visitors. Communication is limited to brochures distributed through tourist offices, hotels and attractions or signage on area roads.

Following are Some Examples of a Range of Activities and their Price Points:



Category	Sample Activities Available in Muskoka	Price Range - Approx.
Relaxation	Fishing, Sight seeing, Boat Cruises	Free to \$42.00
Entertainment	Muskoka Lakes Music Festival, Band at Cranberry Festival	\$3.00 to \$60.00
Interpretation	Outdoor Programs at Algonquin Park, Muskoka Wildlife Centre	\$8.00 to \$16.00
Education	Artist Classes at Galleries & Studios, Astronomy	\$25.00 to \$100.00+
Cultural/Historical Understanding	Segwun Cruise, Grace and Speed, Muskoka Heritage Place	Donations to \$42.00
Skills Development	Water ski Schools, Downhill ski lessons	\$25.00 to \$150+
Adventure	Canoeing, Cross Country Skiing, Wakeboarding	Free to \$200+

Source: MAP Industry Survey 2006

Animated Public Spaces

Communities within Muskoka animate public spaces from time to time to generate interest or excitement in places local residents and visitors congregate. The Business Improvement Areas, local Service Clubs and Chambers of Commerce typically initiate these activities in most communities.

Following is a Sampling of the Ways Public Spaces are Animated:



Huntsville BIA/Chamber	Canada Celebrations, Huntsville Firefly Festival, Sidewalk Sale, Festival of the Arts, Weekly Car Show, Santa Clause Parade, Bath Tub Derby	Downtown
Gravenhurst BIA /Chamber	Canada Day, Native Celebration, Sidewalk Sales, Farmer’s Market, Scarecrow Stroll, Victorian Lamplight	Downtown and Wharf
Bracebridge BIA /Chamber	Canada Day, Midnight Madness, Band shell Concerts, Farmers Market, Septemberfest, Festival of Lights, Santa Clause Parade. Spirit Festival	Manitoba Street - from The Falls, downtown core to Memorial Park
Muskoka Lakes Chamber / local businesses	Bala’s Trek to Bethlehem, Cranberry Festival	Downtown

Culture & Entertainment Options

Muskoka offers a variety of cultural and entertainment experiences and features, well-known performers and artists. They are available at a variety of price points throughout the calendar year. The following charts show a sampling of Arts and Cultural-Related Businesses.



Bala
Bala Guild of Arts And Crafts
Bala Museum
Cranberry Products of Canada
Iroquois Artisans
Kee to Bala
Lynn Norris Studio
Outpost Photography
The Bala Guild of Arts and Crafts

Baysville
Tapawingo Studio
Baysville Horticultural Society

Bracebridge
Andrew Collett Photography
Ashby Glass
Beth Barry Gallery
Cottage Gallery
Eidlitz Handworks Studio Gallery
Jam Sandwich
Jon Partridge Pottery Ltd. The Artful Garden
Memorial Park Band Shelter Concerts
Muskoka Rails Museum
Santa's Village
Stan W. Tait Jewellery Gallery & Studio
The Artists Reply (Summer Art School in Muskoka)
Watershed Photo Gallery
Woodchester Villa

Dwight
Back Country Studio
Spruce Bog Studio



Glen Orchard
Studio in the Glen

Gravenhurst
The Tree Museum
Bethune Memorial House National Historic Site
Farmdog Studios
Geila Bar-David Gallery
Gravenhurst Opera House
Linda Hyrnyk Pottery
Muskoka Boat & Heritage Centre
Muskoka Drive-in Theatre
Muskoka Gateway Gallery
Muskoka Lakes Spring Art Tour
Muskoka Steamship Assoc.
Muskoka Wharf

Huntsville
Algonquin Art Centre
Algonquin Theatre
Brenda Wainman Goulet Bronze Sculpture

Kilworthy
Woods End Studio

Mactier
Foots Bay Gallery

Minett
Juddhaven Studio & Gallery
Muskoka Theatre Project at Red Leaves, Lake Rosseau

Port Carling
Dockside Gallery
Flavours of Muskoka
Gail Wilson's Stain Glass
Muskoka Lakes Museum
Muskoka Lakes Music Festival
Tim DuVernet Photography

Severn Bridge
Gina Denne Pottery
Muskoka Wildlife Centre

Utterson
Sugar Mountain Gallery

Windemere
Northshore Pottery

The chart below shows some of the well-known artists who have performed in Muskoka.

Venues/Events	Artists
Huntsville Festival of the Arts	John McDermott, Kings of Swing, Bruce Cockburn, Celtic Tenors
Muskoka Lake Music Festival	Ian Thomas, David Francey, Valdy
Kee to Bala	Blue Rodeo, David Wilcox, Kim Mitchell
Gravenhurst Opera House	Scott Wood, Bill Irving, Mark Crocker, Gerry Dee.
Algonquin Theatre	Collin James, The Rankin Sisters, The Celtic Tenors, Molly Johnson, Oliver Jones



Culinary experiences

Muskoka offers a good selection of dining experiences. The region boasts a significant number of dining options that have name recognition outside the area, feature well-known accredited chefs and offer a wine list with more than 25 labels.

A Sampling of Restaurants with Chef Accreditation

- Riverwalk Restaurant
- Clevelands House
- Delta Sherwood Inn
- Inn at Christie's Mill
- Deerhurst Resort
- Delta Grandview Resort
- Tall Trees Restaurant
- Hidden Valley Resort
- Bayview Wildwood Resort
- Muskoka Riverside Inn
- 3 Guys and a Stove
- Aroma Dining and Drinks
- Tapps Cottage Eatery
- Deerhurst Resort - Banquets
- Jimmy Hatz
- Windermere Resort/Hotel
- Delta Rocky Crest Resort
- The Old Station Restaurant
- Norsemen Restaurant

Source: MAP Industry survey 2006

Restaurants and Chefs with Name Recognition	
Delta Sherwood	Chef Richard Lalonde
Deerhurst Resort	Chef Rory Golden, considered one of the top Chefs in Ontario
Riverwalk Fine Dining	Chef David Freisen
3 Guys and a Stove	Chef Jeff Sudaby, Hosts Who's Coming for Dinner on The Food Network, Radio Host of From My Kitchen to Yours
Delta Grandview	Chef Ken Shultz
Bala Bay Inn	Chef Matt Brabandy
Hidden Valley	Chef Jamie Clarke

Source: Savour Muskoka



Shopping

In terms of retail shopping experiences, Muskoka has a list of recognizable retailers and a variety of medium to high-priced specialty stores, galleries, antique and artisan shops found throughout the region. Many of these are independently-owned retailers who offer a unique selection of merchandise.

There are several retailers who have name recognition outside the local area or region. A sampling of these include:

- Swift Canoe and Kayak
- The Muskoka Store
- Muskoka Trading Post
- Algonquin Outfitters
- Muskoka Outfitters
- Muskoka Paddle Shack
- Scuba Shack
- Silver Bridge Gallery
- Rich Hill Candles
- Generations Antiques
- The Yellow House Antiques
- The Old Palmer House
- Plug Nickle Antiques
- Peaks and Rafters
- Muskoka Living Interiors
- Hilltop Interiors
- Johnson's Cranberry Marsh
- Birds of Muskoka
- Maple Orchard Farms
- Muskoka Bear Wear
- Due North Apparel
- Simple Chic
- Flotrons





Sport Tourism

Muskoka has played host to a number of National, Provincial, Regional, and local sporting events. Within Muskoka there is an inventory of sports facilities and venues to host these events as well as a volunteer base willing to assist with organization and servicing activities.

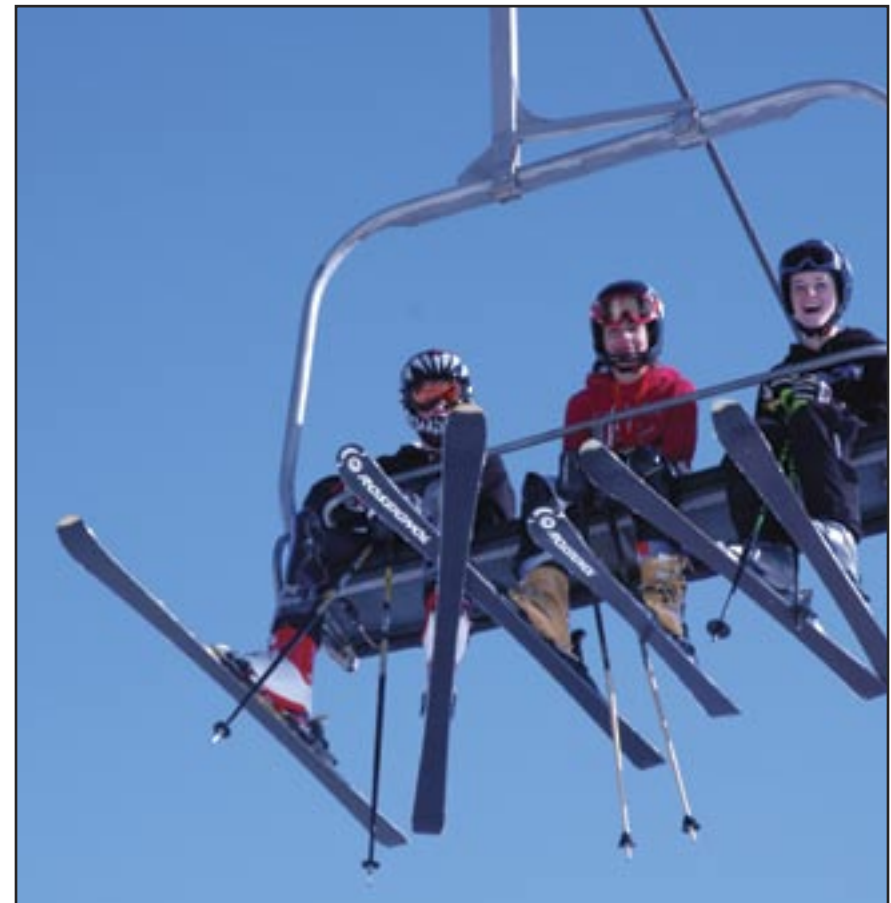
Sport is a major industry, and is a reason people travel. Whether it is the world's high performance athletes traveling to the Olympics or their sport's world championships, or a family traveling with their son or daughter to a weekend regional event, to be called a sport tourist, two conditions must be met:

- They must travel more than 80km and/or stays overnight to attend, compete, or otherwise be involved in a sporting event.
- Sport is the reason they travel - they would not have otherwise traveled to that location had it not been for that specific event.

The scale of the sport tourism marketplace is significant and sports events can have a major economic impact to their host communities:

- The Sub-Committee on the Study of Sport in Canada estimated that there are over 200,000 sports events that occur annually in Canada.

- 9.6 million Canadians regularly participate in sport, either as an athlete, coach, official or volunteer.
- The Canadian Tourism Commission estimates that sport travel in Canada is valued at \$1.3 billion annually.



Satisfaction & Value

This section documents the extent to which Muskoka offers its guests a warm welcome, satisfies expectations, and offers value for money. The evaluation process has identified how guests and outside marketers view the region against these attributes. It also evaluates how Muskoka is investing in improving performance in these areas.

The Premier-Ranked Tourist Destination process identified a significant gap in customer satisfaction research. Neither Muskoka Tourism, local Chambers, nor the majority of tourism businesses in the region have visitor experience data that can attest to guest experience. While most operators and local visitor centres gather visitor statistics of some form, most do not track guest experience. This lack of visitor satisfaction data on a region-wide basis is cause for concern.

It is interesting to note that 96% of survey respondents said that more than 75% of their guests were very satisfied with their experience, however, only 34% of respondents said they offered visitors an opportunity to provide comment on their experience through comment cards or surveys. That begs the question: Does the industry really know how visitors perceive Muskoka as a destination?

While for the most part, local residents are friendly and helpful, some survey respondents suggested that “an attitude adjustment” is required in our communities. Respondents said that there is a lack of appreciation for the importance of tourism to Muskoka’s economy and hence quality of life for all. They also suggested that to be truly successful as a destination, our permanent residents – beyond those already employed by the tourism industry – need to embrace a warmer, friendlier attitude towards both second home owners and visitors to the region.

Issues identified by many survey respondents were the lack of fine dining establishments in some areas; retail business hours that are not conducive to tourists; a lack of nightlife; and fewer choices for shopping and dining in the off season. These factors have an obvious negative impact on satisfaction levels of guests to Muskoka.

Through industry consultations and peer-to-peer feedback it appears that the industry may be comfortable with current levels of service and therefore this may or may not be an issue. One indicator to support this is that key experience and service price points are staying the same or trending upwards. (See Table at right)



Experience	Price	Trend - (Up, Down, Same)
Accommodations	\$45 - \$200+	39% indicated prices stayed about the same in last 2 years 60% reported an increase 1% reported a decrease Out of 121 respondents.
Arts/Culture/Heritage/Attractions	\$2.00 - \$60.00	74% indicated prices stayed about the same in last 2 years 26% reported an increase 0% reported a decrease Out of 42 respondents.
Festivals	\$5.00 - \$60.00	91% indicated prices stayed about the same in last 2 years 9% reported an increase 0% reported a decrease Out of 46 respondents.
Outdoor Experiences	\$3.00 - \$600.00	35% indicated prices stayed about the same in last 2 years 65% reported an increase 0% reported a decrease Out of 20 respondents.
Golf	\$20 - \$180.00	62% indicated prices stayed about the same in last 2 years 30% reported an increase 8% reported a decrease Out of 13 respondents.

Source: MAP Industry Survey 2006.

Experience	Visitation - (Up, Down, Same)
Accommodations	45% indicated visitation stayed about the same in last 2 years 29% reported an increase 25% reported a decrease Out of 119 respondents.
Arts/Culture/Heritage/Attractions	44% indicated visitation stayed about the same in last 2 years 26% reported an increase 31% reported a decrease Out of 39 respondents.
Festivals	28% indicated visitation stayed about the same in last 2 years 16% reported an increase 6% reported a decrease Out of 50 respondents.
Outdoor Experiences	50% indicated visitation stayed about the same in last 2 years 29% reported an increase 21% reported a decrease Out of 14 respondents.

Source: PRTD Industry Survey 2006.

In addition, an average of 25% of survey respondents reported that their visitation numbers are trending upwards as shown above. This contradicts the visitation numbers in the Regional Tourism Profile for Muskoka which shows declining number of visitors. The difference may be attributed to the fact that second home owners are included in the Tourism Profile visitor counts and therefore the decline may be related to fewer trips by second home owners.

Examining this data, one might conclude that guests are receiving some degree of value for money and are receiving acceptable levels of service

and hospitality.

However, while some individual operators are asking their guests about the experience they received at a specific property, they are not asking these guests what they thought about their experience in Muskoka as a whole. For example, a visitor may be extremely pleased with their accommodations and fill out a survey to that effect, but that guest may have had a negative experience elsewhere in the region that is not being captured.

Further, no data or research is available on potential visitors who may not even be aware of Muskoka as a des-

tinuation. Who are these visitors and why aren't they visiting the region?

Affordable Muskoka

In recent years, Muskoka has achieved an undeserved reputation for being a destination only for the wealthy. This perception has been driven by media stories about million dollar cottages in the area. No doubt, the high cost of real estate on the larger lakes has also fed this perception.

For example, the New York Times published an article about Muskoka, calling the region “Malibu of the North”. An investment development communiqué in the summer of 2007, said Muskoka is “known as a playground for Hollywood and sports celebrities, [where] you can find palatial cottages, upscale yachts, and exotic cars throughout the region.” Most stories that appear in the media make reference to million dollar cottages and frequently include photos of beautiful boathouses and the gorgeous mahogany boats that were built here in the early 1900’s.

Even more recently, neighbouring destinations have begun to market themselves as “the new Muskoka” or the “affordable Muskoka” once again reinforcing the misconception that Muskoka is not an affordable destination. Certainly luxurious experiences abound in Muskoka, but there are just

as many experiences that are affordable for travellers looking for less expensive experiences. In fact, currently there are no 4 or 5 star properties in Muskoka.

Having said that, being known as a destination for the wealthy can also have its advantages. Some visitors want to experience how “the other half lives”. For example, the Muskoka Steamships effectively use this perception to market their cruises. An overnight voyage to Cleverlands House or Windermere House promises “an ultimate getaway featuring the charmed life of the rich and famous”. Several cruise operators offer a tour to “Millionaires Row”. Yet another offers a “Cottage Cruise” which is described as “a once-in-a-lifetime opportunity to visit one of Muskoka’s most prestigious summer homes”. This is a great example of how this perception can be used to drive visitation to the area.

The challenge, however, will be to temper these perceptions with more realistic portrayals of the type of experiences, including cottage experiences, that can be enjoyed at a very affordable price point. Cottage resorts, B&B’s, inns, motels and the broad range of campgrounds and affordable family attractions in the area are good examples.

Accessibility Rating

This section assesses the ease of getting to and traveling within Muskoka, the transportation modes that serve it and the importance of transportation to the tourist experience. The evaluation process has identified how accessible Muskoka is and how well that accessibility is being managed.

There are more than 7 million people living within a 3-hour radius of Muskoka.

Population within a 3 Hour Radius	2006
Hastings County	130,474
Northumberland County	80,963
Peterborough County	133,080
Kawartha Lakes Division	74,561
Durham Regional Municipality	561,258
York Regional Municipality	892,712
Toronto Division	2,503,281
Peel Regional Municipality	1,159,405
Dufferin County	54,436
Wellington County	200,425
Waterloo Regional Municipality	478,121
Perth County	74,344
Bruce county	65,349
Grey County	92,411
Simcoe County	422,204
Haliburton County	16,147
Nipissing District	84,688
Parry Sound District	40,918
Sudbury District	21,392
Greater Sudbury Division	157,857
Total	7,244,026

Source: Stats Canada, 2006

The destination is located less than two hours from the major international gateway at Pearson International Airport in Toronto. Niagara Falls, another international gateway and major border crossing to the United States is 4.5 hours away.

Muskoka Airport

The region also has its own regional airport which is also a Canada Customs port of entry managed by the Canada Border Services Agency (CBSA). The airport offers the CANPASS System with its Private and Corporate Aircraft program. This program allows pre-approved, low-risk travelers coming to Canada on a private aircraft with no more than 15 people, including the crew, to report to the CBSA by telephone before landing at the airport.

Muskoka Airport operates 24 hours a day, seven (7) days per week, 365 days per year. The public terminal building is located at the south end of the field and has a public area available 24 hours per day.

Aviation Facilities

The airport has two runways. The primary runway 18 (181°) / 36 (001°) is 1829m x 45.7m (6000' x 150') asphalt and has a Pavement Load Rating (PLR) of 9 capable of carrying loads of 90,720 kilograms (200,000 lbs.) MTOW. The secondary crosswind



runway is 09 (090°) / 27 (270°) is 664m x 30.5m (2180' x 100') grass.

Taxiways Alpha and Bravo are restricted to aircraft with a wingspan of less than 24 metres (79'). Runway 18/36 has three stage medium intensity edge lights controlled by a type K - ARCAL on 122.3 and a Precision Approach Path Indicator (PAPI) on runway 18. Muskoka operates on a mandatory frequency within five nautical miles of the field, operated by Nav Canada, London Radio.

Nav aids: Runway 18/36 has a straight in GPS approach procedure. There is also a Non Directional

Beacon located 3.5 nautical miles from the airport.

Refueling: The District Municipality of Muskoka is the ESSO branded dealer located at the Muskoka Airport. Fuel available on-site is 100LL and Jet A1-FSII. After hours call-outs can be arranged by contacting (705) 687-2194.

Passenger Facilities

Terminal: The existing small passenger terminal is located at the south end of the field.

Airport staff operating hours are: May 15th to August 31st - 8:00 AM to 8:00 PM:

September 1st to May 14th - 8:00 AM to 6:00 PM

Parking: While there are areas dedicated for parking, the airport currently does not charge for vehicle parking. All vehicles parked on airport property do so at the owners risk. **Ground Transportation:** Arriving passengers can arrange for taxi pick-up at the terminal. Rental cars can also be arranged through the airport staff.

Muskoka Golf Airways

Utilizing a DeHavilland Beaver, Muskoka Golf Airways currently offers aerial sightseeing tours in the area but in the past has also flown passengers out of Toronto island airport affording quick passage for groups travelling to Muskoka to play golf.

Automobile and Coach Travel

For visitors who travel to Muskoka by automobile or motor coach the drive can be either pleasant or unpleasant.

Pleasant experiences can stem from:

- A major 4-lane highway leading out of the Greater Toronto Area splits at Barrie into 2 separate major highways traveling north into the region. These two main highways are in fair to good repair with either center medians or a complete divided highway. Speed limits vary from 90-100 km/hr.



- Access routes into the interior of the region are mostly paved, two-lane, undivided provincial highways or District roads
- Rest stations, restaurants and gas stations are accessible along the major routes.

Unpleasant experiences can stem from:

- Traffic congestion on: Hwy 400 North from Toronto to Barrie; Hwy 11 North from Barrie to Gravenhurst; and Hwy 400 North from Barrie to MacTier.
- Seasonal roadway construction at various points along the 2 main access highways.
- Winter travel can be a deterring factor due to the level of snow precipitation in the region resulting in snow and ice covered roads with areas of poor visibility at times.
- Traffic accidents can play a major role in creating havoc as the closure of Highway 400 can greatly reduce the ability of drivers to reach the destination.
- Restaurants and gas stations are limited in the interior of Muskoka

Major transportation corridors

Highways 400 and 11 are the primary routes from the Toronto area to Muskoka. These highways are well maintained year-round and offer more than adequate directional signage.

Signage on Highway 11 and Highway 400 could be improved with better signage promoting the location of towns and villages in the interior of Muskoka (eg., Bala and Port Carling). Regional roads are also well maintained throughout the year and they too, are well-signed and offer satisfactory visitor way-finding through Muskoka.

Way-Finding Signs

While towns and townships have gateway signs that are used at key entrance locations, the region does not have Gateway signs, which reinforce the tourism brand. Directional signage for visitor centres throughout the region are poor. The primary visitor centres on Highway 11 and at Port Severn for example, appear to be rest stops rather than full service visitor centres. Previous attempts to acquire better signs have been unsuccessful. Only official provincial visitor centres are allowed to use the Travel information signs on major highways.

Directional way-finding signs to visitor information centres within each town /township could also be improved. Way-finding signs from major highway corridors to the interior of Muskoka have been sited as a possible deterrent to visitation to towns such as Port Carling, Bala and others in the interior.

Bracebridge is to be commended for the large font sizes used on its street signs. It makes navigation much easier in areas where night-sky-friendly lighting is used and for an overall Canadian population that is aging.

Other modes of transportation

While there are alternative modes of transportation, they are limited and not used by many visitors. Most arrive by private car. Alternate forms of transportation include:

Rail Service

Ontario Northlander service was revived in 2004. It takes 2.5 hours to travel from Toronto and is limited to one northbound trip per day at 11:05 am and one southbound per day at 3:55 pm (from Bracebridge). Cost from Bracebridge to Toronto is \$36.85 one way for an adult, offered every day but Saturday. Service is provided to Gravenhurst, Bracebridge, and Huntsville.

Bus Service

Provided by Ontario Northlander, the service has stops at Gravenhurst, Bracebridge, Port Sydney, and Huntsville. There are 3 to 6 southbound and northbound trips per day, depending on the day of the week. Adult price for one way is \$32.90 and travel time is 3 1/4 hours. Greyhound bus lines from Toronto provide daily service to the west side of the District

with stops in Port Severn, Bala, Port Carling and MacTier. There are on average 3 runs per day south and northbound. Adult price one way to Port Carling is \$ 31.48. Travel time is 4 1/2 + hours. Greyhound and Ontario Northlander work cooperatively to offer service.

Car Rental Agencies & Taxi Service

For those visitors arriving by rail and bus who hope to rent a car upon arrival in the destination, the paucity of car rental agencies is a challenge. Further, the lack of taxi service in most areas can be a deterrent to visitors who may wish to experience Muskoka's nightlife but do not wish to drink and drive or need a quick means of transportation to areas not served by bus or train. For example, a visitor without a vehicle would find it difficult to get to Port

Carling without taking an expensive taxi ride.

Boating

Muskoka offers in excess of 75 municipal docking slips for transient boaters. Some of these slips are located within walking distance to visitor services and tourism experiences. The 49 Marinas located throughout Muskoka also offer over 182 transient docking slips.

Transient Boaters can also easily access one of the 68 Boat launches located on the many lakes throughout the District. Detailed nautical Charts produced by the Canadian Hydrographic Service are available for Lake Muskoka, Lake Rosseau, Lake Joseph and Georgian Bay, Sever River and Sparrow Lake. Charts for many of the other area lakes can be sourced through area Marinas.



The following are the star rating descriptions of the Hotel Association of Canada. Muskoka does not currently have any 4 or 5 star properties.



At this level, guests should expect clean and well-maintained accommodations providing the necessary facilities for an enjoyable stay. Criteria includes standards such as room size, window screens and coverings, clothes storage, linens, door lock, smoke detector, and parking facilities.



This level equates to what is popularly considered “mid-range” accommodation. It exceeds the 1 star level in quality of mattress, bed linen, floors/window/wall coverings, and in provision of bedside and seating area lighting, additional room furniture, and parking space.



These properties will offer larger units with additional room furniture, coordinated furnishings, better quality mattresses and linens, and will be equipped with clock/ alarm, extra amenities in washrooms, etc. Private baths for all BB rooms is a requirement for a 3 star and higher rating. Three star properties offer above average facilities and services.



This rating indicates exceptional quality in all areas of facilities and services offering superior quality throughout the property in areas of guestrooms, bath and common areas. The property typically provides laundry/valet service as well as many additional amenities.



A 5 star property is luxurious at a world standard, offering outstanding facilities, guest service and amenities.

Accommodation Base

This section assesses the breadth and depth of the Muskoka’s offering in terms of the range of accommodation classes available, their location, and the presence of higher end operators. The evaluation characterizes the region’s accommodation base.

Muskoka offers visitors a variety of accommodation options at a variety of price points within proximity of core attractors. There are over 3,426 rooms in roof accommodations as well as over 2,400 tent/trailer/RV sites.

Roofed Accommodations	# of Businesses	# of Rooms	Price Range
B&B’s	57	161	\$50-\$200
Cabins & Cottages	28	209	\$50-\$200
Motel - Individual	21	354	\$45-\$150
Motel Chains	5	271	\$59-\$150
Hotels	6	236	\$90-\$160
Lodges	9	120	\$50-\$200
Resorts	43	2,075	\$100-\$200+
Total	169	3,426	

Source: MAP Industry Survey 2006

While most of the 34+ children’s camps have maintained their traditions of summer operations that cater to youth, some have extended their seasons to cater to schools, church organizations, and corporate clients. Muskoka Woods Sports Resort in Rosseau operates successfully year-round with a full program of activities in each season.



The accommodation inventory also includes “branded” well-known chains*.

Huntsville:

Higher End Brands: Delta Grandview, Deerhurst Resort (was formerly a Canadian Pacific Hotel) although does not currently operate under a flag it does have strong name recognition in the GTA, other brands that are mid-priced include: Best Western, Motel 6, Comfort Inn, and Travel Lodge.

Bracebridge:

Higher End Brands: There are no branded properties that fit this description; however, The Inn at the fall has established name recognition in the GTA. Mid-priced: Sleep Inn, Travel Lodge

Gravenhurst:

Higher End: Taboo (formerly Muskoka Sands - does have name recognition in the GTA - branding also accepted by their championship golf course which is promoted as “Mike Weir’s home course.” Mid-priced: Marriott’s Residence Inn (Coming in 2008), Howard Johnson’s

Muskoka Lakes:

Higher End: Cleveland’s House (strong name recognition in the GTA), Delta Sherwood, Red Leaves’ J.W. Marriott Resort (coming in 2008)

Georgian Bay:

Mid-priced: Delawana Inn Resort (strong name recognition in the GTA).

Lake of Bays:

No branded properties.

*Higher-End properties in Muskoka are in the 3+ star ranges. There are not currently any 4 or 5 star brands in the area such as a Four Seasons or Ritz Carlton.

The Performance Dimension Evaluation Rating for Muskoka



No - the affirmation cannot be made or supported for the destination. For a complete description on why Muskoka received this rating, please see page 71.

The Performance measures identify the extent to which Muskoka is successful and recognized in the marketplace. By comparing Muskoka’s performance attributes in terms of hard data conclusions can be determined as to its actual performance against its primary competitors and in the context of a competitive marketplace. Visitation statistics, accommodation occupancy levels, and critical acclaim are all industry standards to measure performance.

The quality of the tourist experience and the destination’s success in providing it is validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim

Visitation

This section assesses Muskoka’s market performance in terms of visitation numbers and market share, attractiveness to different market segments, and times of year.

Total Visitors to Muskoka

The following information was sourced from the Ministry of Tourism’s Regional Tourism Profile. The latest data available at the time of this report is for

2004. The 2005 and 2006 profiles are currently being completed.

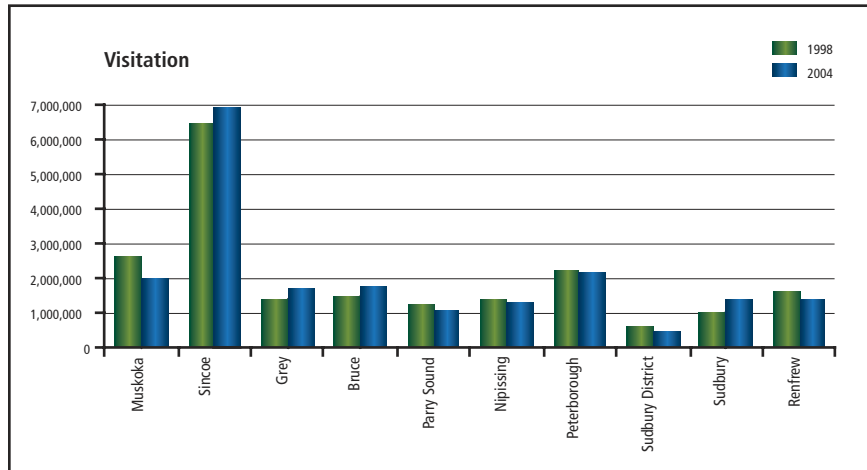
In 2004, 1,993,792 travellers visited Muskoka District Municipality. Of these visitors, 1,324,338 or 66% stayed in the area for one or more nights and the balance, 669,454, or 34%, made a same-day visit to the District.

Visitation Patterns to Muskoka by Length of Stay and Purpose (1998-2004)

The Muskoka region has experienced an overall decline in terms of total visits. In 2004 same day travel represented 33.6% of trips taken to Muskoka and overnight visits accounted for 66% of the trips. Compared to the province as a whole, the region attracts a higher proportion of overnight trips; 66% for Muskoka and 39% for Ontario.

Title/Year	1998	1999	2000	2001	2002	2003	2004
Total Visits	2,586,094	2,655,383	2,596,358	2,207,915	2,569,252	2,190,700	1,993,792
Same Day Visits	677,349	773,001	817,768	615,282	704,301	566,358	669,454
Overnight Visits	1,908,745	1,882,382	1,778,590	1,592,632	1,864,951	1,624,343	1,324,338
Overnight Pleasure Visits	1,274,817	1,279,203	1,320,184	1,119,520	1,479,434	1,269,425	914,401
Overnight VFR Visits	493,666	479,891	383,310	386,964	259,101	272,225	320,228
Overnight Business Visits	47,469	40,852	26,951	36,718	39,210	26,739	18,857
Other Overnight Visits	92,794	82,435	48,145	49,430	87,206	55,953	70,852

Muskoka Visitation Compared To Other Destinations



Visitation Patterns By Place Of Origin

Muskoka falls below provincial averages for visitors from outside Ontario’s borders.

Muskoka	Total	From Ontario	From U.S.	From International
Person Trips	1,993,791	1,868,100	75,391	150,647
Same Day	669,453	654,105	10,323	19,679
Overnight	1,324,338	509,003	100,085	41,793
Pleasure	1,200,236	1,213,996	65,068	130,968
VFR	550,618	508,003	20,953	53,373
Business	80,284	77,166	2,150	4,086

In 2004, of all the overnight visitors to Muskoka District Municipality, just under 93% were Canadians, and just over 7% were international visitors, including 5% from the USA and 2.5% from other countries.

Muskoka Visitation Compared to Other Regions in Ontario

The following table shows Muskoka’s performance compared to the Province and other similar destinations. It is interesting to note that those destinations that achieved some growth are new and emerging destinations and/or destinations which have made significant investments in marketing.

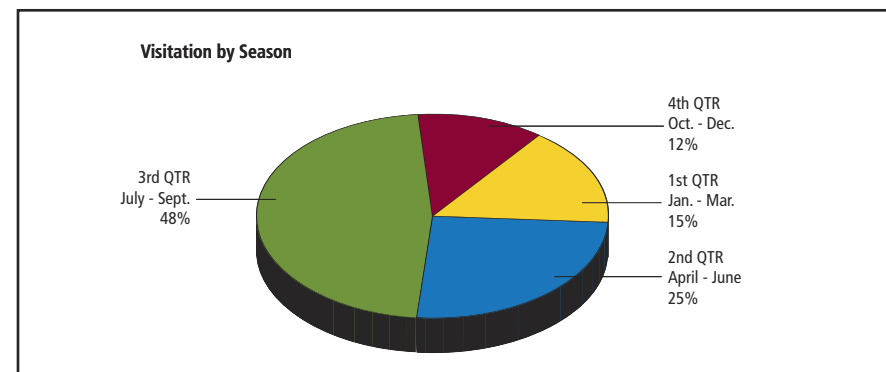
Destination	Visitation in 1998	Visitation in 2004	% change
Ontario as a whole	122,419,617	118,284,236	-3%
Muskoka	2,586,094	1,993,792	-23%
Simcoe	6,467,563	6,931,146	+7%
Grey County	1,353,595	1,662,479	+27%
Bruce County	1,410,806	1,726,200	+24%
Parry Sound	1,237,319	1,049,793	-15%
Nipissing	1,381,586	1,273,193	-1%
Peterborough	2,199,816	2,095,944	-5%
Sudbury Dsitric	545,912	411,204	-25%
Sudbury	934,597	1,371,884	+58%
Renfrew County	1,600,516	1,335,508	-17%

Type of Accommodation

Overnight visitors spent 4,152,319 person nights in Muskoka District Municipality, with 1,067,328 of these nights or 26% spent in roofed commercial lodgings such as hotels, motels, resorts, B&Bs and commercial cottages. 420,136 person nights or 10% were spent in local campgrounds or trailer facilities and 2,551,289 person nights or 61% were spent in private homes or private cottages.

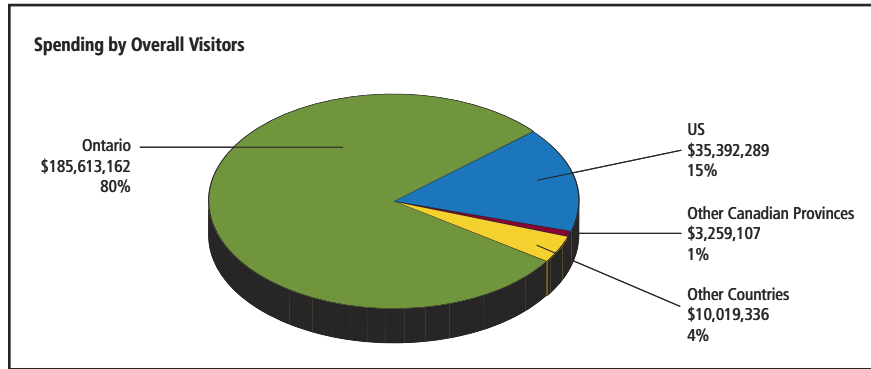
Visitation by Season

Following is the breakdown of visitation to Muskoka by quarter:



Spending

Same-day and overnight visitors spent \$234,283,895 in Muskoka on tourism-related expenditures/categories including lodging, food and beverages, transportation, entertainment and retail during 2004.



Overnight visitors spent \$209,535,367 in Muskoka District on tourism-related expenditures/categories including lodging, food and beverages, transportation, entertainment, and retail during 2004.

The average per person per night spending for overnight visitors to Muskoka was about \$52. Overnight visitors from Ontario spent approximately \$48 per person per night in the area; those from USA spent about \$90 per person per night; and those from other countries spent approximately \$55 per person per night.

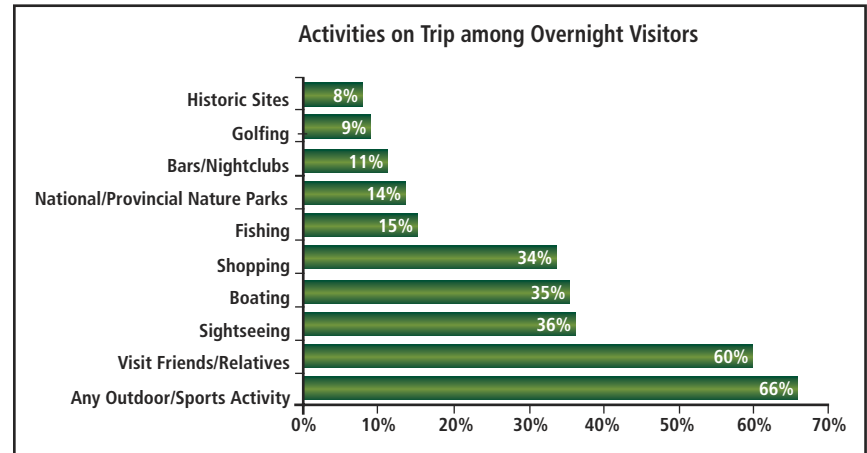
In addition to steady declines in the total number of visitors coming to Muskoka (1998 - 2004), total visitor spending is also on the decline. For example, between 2003 and 2004, total visitor spending declined by over \$55 million dollars from \$290,262,504 in 2003 to \$234,283,895 in 2004. To put this in perspective, a \$55 million spend would fill virtually every hotel and motel accommodation in the region for a full year.

Food/Beverage at Stores, Accommodation, and Vehicle Operations led the spending list in 2004.

Spending Categories	Spending	% of Total Spending
Food/Beverage at Stores	\$70,424,948	30%
Accommodation	\$60,860,055	26%
Vehicle Operations	\$46,736,250	20%
Recreation/Entertainment	\$44,095,913	19%
Food/Beverage at Restaurants/Bars	\$26,329,035	11%
Retail/Other	\$23,363,579	10%
Vehicle Rental	\$2,210,405	1%
Public Transport	\$854,765	<0%
Local Transport	\$434,459	<0%

Activities on Overnight Trips

The 10 top trip-activities engaged in by overnight visitors to Muskoka are displayed in the chart below. For example, Any Outdoor/Sports Activity was an activity that 66% of overnight visitors to Muskoka District Municipality participated in while on their trip.



Source: Ministry of Tourism, Regional Tourism Profiles 2004.

While it is difficult to directly align Muskoka’s core attractors to definable provincial trip types, the region is recognizing a small percentage of trips taken to Ontario for the purpose of rural and urban experiences, sightseeing or touring, or visiting a garden.

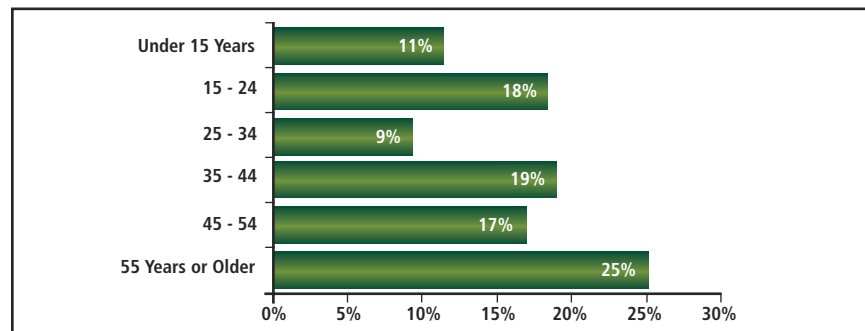
In terms of Muskoka’s share of business for its core attractors the chart below shows a comparison to that of other competitors.

Activities on Trip - All Flows	Overnight	Overnight	Overnight	Overnight	Overnight	Overnight
	Ontario	Muskoka	Simcoe County	Grey County	Bruce County	Haliburton
Visit Friends/Relatives	28,791,781	793,188	1,700,325	614,945	717,196	402,046
Festivals/Fairs	3,225,712	91,665	191,224	48,094	91,261	108,081
Cultural Performances	3,450,816	76,010	137,858	28,350	70,833	24,428
Museums/Galleries	4,113,757	55,289	119,359	38,185	65,599	11,463
Zoos/Aquariums/Gardens	1,977,019	30,153	99,482	21,286	33,034	12,609
Sports Events	2,900,123	96,027	128,129	70,627	57,035	19,335
Shopping	20,781,743	447,450	1,153,701	360,036	534,349	292,951
Sightseeing	15,453,714	479,923	1,018,425	393,925	457,194	273,823
Nightlife	7,600,511	149,602	434,783	49,718	106,232	21,364
Casinos	3,012,262	22,817	365,927	14,931	23,025	79,106
Theme Park	1,861,774	66,355	159,172	18,172	50,863	1,967
National/Provincial Nature Parks	5,390,529	181,491	343,937	103,125	252,629	29,464
Historic Sites	4,989,036	100,063	190,815	86,787	126,294	20,995
Any Outdoor/Sports Activities	16,495,960	875,284	1,552,899	457,943	567,900	471,076
Boating*	4,575,108	467,206	419,363	96,059	105,974	236,230
Golfing*	1,667,525	120,129	168,803	44,696	110,330	103,195
Fishing*	3,594,086	202,769	203,270	74,328	88,143	184,841
Hunting*	263,407	11,999	224	0	3,416	3,687
Downhill ski/Snowboarding*	388,165	5,293	231,973	23,358	0	11,616

*Included in "Any Outdoor/Sports Activities"
Source: CTS / ITS, Statistics Canada, 2004

Age of Overnight Visitors

The average age of overnight visitors to Muskoka District Municipality was approximately 39.2 years.



Travel Party Size

89% of the overnight visitors to Muskoka were traveling in adult-only parties and the remaining 11% were traveling with at least one individual fifteen years of age or younger. The average party size for overnight visitors was 1.8 (including children).

Ethnicity of Visitors

There is no data available on the ethnicity of visitors traveling to Muskoka however, if one looks to the region’s largest market it is clear that visitors who come to Muskoka do not reflect the ethnic diversity of the GTA.



Meetings, Convention and Incentive Travel Business

According to the Ministry of Tourism, Muskoka’s Meetings & Convention business is not significant at 6,211 trips. This represents 0.2% of the total 2,634,045 M&C trips to Ontario. In Muskoka, 5,539 were overnight trips. Feedback from tourism operators in Muskoka, however, suggest that the Ministry of Tourism numbers for M&C business in Muskoka is understated.

Second Home Owners

In 2004, The District of Muskoka completed a Second Home Study with the main objective to estimate the seasonal population of Muskoka. This study allowed an understanding of the population and the economic contributions of second home owners to Muskoka’s economy.

The study reported that there are 20,567 seasonal dwellings in The District of Muskoka with an average of 3.7 persons per household, resulting in a 76,098 (59%) seasonal population. The permanent population count is 20,690 dwellings with an average of 2.7 persons per household, resulting in a 53,106 (41%) permanent population. (2001 Census)

Of the 20,567 seasonal dwellings, 57% spend more than 31 days in Muskoka during the summer, 82% visit their second home at least once during the spring, 87% at least once during the fall and 41% at least once in the winter.

The study reported that less than 8% of second home owners rent their cottages.

The second home owners reported to host an average of 84 visitor nights annually resulting in over 1,700,000 visitor nights per year.

The average weekly expenditures for second home owners was reported to be \$614. This amount along with major purchases including furnishing, construction, recreational vehicles and professional services resulted in \$581 million annually in direct expenditures.

- Over \$13 million of this was spent on entertainment including dining, movies, and attractions)
- \$10 million was spent on sporting and recreational goods
- Over \$43 million was spent on Marina services (not including boat purchases)

It was also noted throughout discussions with the MAP Advisory and Industry Committees that the second home owners play a significant role in supporting the existing tourism businesses in the District.



Occupancy & Yield

This section assesses Muskoka’s market performance in terms of accommodation occupancy and guest expenditure levels. The evaluation compared occupancy and expenditure performance against industry and provincial averages.

Occupancy Rates and Revenue Per Room

Muskoka’s commercial accommodation occupancy in 2005 was 50%; this is below the provincial average of 62%. The average daily room rate was \$160 compared to the Provincial average of \$120. Muskoka’s Average Revenue Per Room (RevPar) was \$80.20 compared to the Provincial Average of \$75.00.



Hotel occupancy rates in Muskoka decreased by 6 percentage points, from 55% to 50% between 1998 and 2005. *Source: PKF*

Average visitor spend

The average expenditure for guests on day trips to Muskoka was \$36.97 compared to \$62.56 average for Ontario. Overnight guests to Muskoka spend on average \$158.22 compared to \$270.27 average for Ontario.

Market Share

In 2004, total spending by guests on day trips to Muskoka was \$24,748,528. Total spending by all tourists on day trips in Ontario was \$4,474,312,938; the destination’s share of total spending by these tourists was 1%.

Guests on overnight trips to Muskoka spent \$209,535,367, total spending by all tourists on overnight trips in Ontario was \$12,606,368,560, and the destination’s share of total spending by these tourists was 2%.

Muskoka Hotel Occupancy Rates, RevPar and ADR

Title/Year	1998	1999	2000	2001	2002	2003	2004
Hotel Occupancy Rate (%)	55	51	52	47	50	50	50
Revenue Per Room (\$)	73	75	75	70	75	81	78
Average Daily Room Rate (\$)	132	146	144	148	151	161	157

Fractional Ownership

There are a number of fractional ownership projects underway in Muskoka. The Ministry of Tourism defines fractional ownership is portioned equity ownership of a property. Typically each owner has a number of weeks of occupancy attached to their purchase of the vacation home. When purchasing a fraction of a vacation home, owners are entitled to occupy the home certain fixed weeks during the summer season and a number of rotating variable weeks throughout the rest of the year depending on the size of ownership fraction you purchase. In addition to new construction, approximately 310 rental rooms and 26 rental cottages have been converted to fractional ownership properties.

There needs to be a better understanding of the impacts of both the new fractional businesses as well resort conversions due to the following:

- Rental space available to the traditional vacationing tourist.
- Seasonal and full time employment
- Membership dues and or advertising revenue for organizations such as Chambers of Commerce, Muskoka Tourism Marketing Agency, Resorts Ontario and the Ontario Tourism Marketing Partnership.
- Change in occupancy trends
- Uplift in year-round visitation
- Loss of tourist commercial property

Competitive Comparison							
	Ontario	Muskoka	Bruce	Grey	Simcoe	Haliburton	Parry Sound
Total Person Visits (Weighted)	118,284,236	1,993,792	1,726,200	1,662,479	6,931,146	879,605	1,049,793
Length of Stay in Region							
Same-Day	71,612,018	669,454	599,426	831,711	3,929,147	244,904	208,118
Market share - Day visits		0.9%	0.8%	1.2%	5.5%	0.3%	0.3%
Overnight	46,672,218	1,324,338	1,126,774	830,768	3,002,000	634,701	841,675
Market share - Overnight		2.8%	2.4%	1.8%	6.4%	1.4%	1.8%
Market share – total visits		1.70%	1.50%	1.40%	5.90%	0.70%	0.90%
Spending							
Total Spending Assigned to Region for Visits in Region	\$17,080,681,498	\$234,283,895	\$154,751,311	\$138,083,251	\$747,829,224	\$96,418,414	\$121,330,309
Total Spending Assigned to Region for Same-Day Visits in Region	\$4,474,312,938	\$24,748,528	\$11,492,037	\$39,385,668	\$160,836,405	\$8,733,947	\$6,623,873
Average Spending Per Person Per Night	\$84.45	\$52.47	\$43.91	\$48.97	\$80.89	\$40.98	\$36.4
Average Spending Per Person Per Same-Day Visit	\$62.56	\$36.97	\$19.24	\$47.36	\$41.05	\$35.66	\$31.83
Total Spending Assigned to Region for Visits in Region & Residents Leaving Region	\$21,378,861,672	\$254,468,991	\$185,575,379	\$177,583,559	\$910,853,576	\$100,294,624	\$137,142,801
Market share - total spending		1.2%	0.9%	0.8%	4.3%	0.5%	0.6%
Source: Ministry of Tourism, Regional Tourism Profiles 2004							

Muskoka's share of provincial spending by Day Trippers was 1% while its share of Overnight spending was 2%

Critical Acclaim

This section addresses the extent to which Muskoka is recognized as a must-see destination, has a profile that contributes to the attractiveness of Ontario and Canada as a destination, and, is a “top-ranked” place to visit. The evaluation identifies whether Muskoka is recognized as standing out from its competitors.

Muskoka can be considered a “must see/must do” destination. There are many traditional water-based and outdoor activities that visitors consider to be part of “cottage country”.

These tend to be the icons such as boat cruises, canoeing, hiking, strolling through historic downtowns and sightseeing at waterfalls. The physical setting is unique compared to nearby destinations, so, even though other destination’s may offer many of the same experiences, one could argue that canoeing on the Big East River is more appealing than canoeing on Lake Simcoe or Wasaga Beach. In many cases Muskoka may still be top-of-mind for civilized wilderness-type experiences and mid-sized lake boating that is not as challenging as navigating the larger bodies of water like Georgian Bay or tackling the true wilderness in points north.

The breadth of cultural activities and the small town/village experience may be less well known.

Muskoka and its core attractors have been ranked as “Number 1,” “Best in Class” or “Top Tier” in many areas. Following are just a few examples:

The Rock Golf Course	2004 – Golf Digest Magazine Awarded with Best New Golf Course in Canada
Delta Rocky Crest	October 2006 – Score Magazine’s #5 Top Golf Resort In Canada’
Muskoka Bay Golf Course	Ontario Golf and Fairways Golf Magazine – Best new course of 2006
Bala Cranberry Festival	Top 50 festivals - 4 years running
The Alexandra Luke Gallery	Queen’s Jubilee Medal 2005 NOAA – 1 painting chosen 2006 NOAA – 2 paintings chosen
Muskoka Boat and Heritage Centre	Voted top 10 Best New Attractions in Canada – Where Magazine
The RMS Segwun	In 2001 and 2002, voted by Attractions Canada Best Large Attraction In The Province Of Ontario

Provincial And Federal Reinforcement Of Muskoka As A Destination

As well, images of Muskoka are often used in Ontario Tourism Marketing Partnership Corporation and Ministry communiqués but these communications tend to depict the destination with images and key messages that reinforce a narrow perception that Muskoka is unaffordable and only for the rich and famous.

At one time, the Canadian Tourism Commission (CTC) restricted its coverage of Muskoka to National Historic sites such as Bethune House and natural attractions such as Algonquin Park. If you were to visit the CTC’s website today however, www.keepexploring.ca, it is impossible to find an explicit reference to the region. For example, where Niagara has five references, Muskoka has none.



The Futurity Dimension Evaluation Rating for Muskoka



No - the affirmation cannot be made or supported for the destination. For a complete description on why Muskoka received this rating, please see page 72.

Futurity identifies the extent to which Muskoka is investing in its future as a place with viable and continuing attractiveness to evolving markets. It includes the activities in place to raise awareness for the destination, as well as the degree to which new investment in the form of capital dollars will be made to enhance its product offering. It also determines its capacity in a number of physical measures such as infrastructure.

The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

Destination Marketing

This section identifies to what extent Muskoka targets viable markets, invests in managing and promoting its tourism marketplace and consults with the travel trade serving the region. The evaluation identifies if Muskoka is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.

Market demand for Muskoka experiences

There is a clear market demand for Muskoka’s experiences as demonstrated in the March 2006 Travel Attitude and Motivation study. Shown at right are the percentage of people who were motivated to travel based on participating in the following activities:

Activity	%
All Water-Based Activities	33%
Fresh Water Fishing	10%
Sunbathing, Sitting on Beach	17%
All Winter Activities	16%
Downhill Skiing	8%
All Land Based Activities	29%
Hiking	5%
Visiting National, Provincial Parks	11%
All Performing Arts	17%
Live Theatre	5%
All Festivals and Events	16%
Farmer’s Markets or Country Fairs	4%
Art Galleries	3%
Museums, General History or heritage	4%
Strolling around a city to observe its buildings and architecture	8%
All Hands on learning	4%
All Shopping	16%
Lakeside Resort	7%
Public Campground in a Nature Park	11%
Private Campground	6%
Campsite in the wilderness	4%

Insufficient Marketing Budgets and Human Resources

None of the organizations involved in tourism marketing have sufficient funding to conduct research, identify target markets and to develop programs that effectively market the region or individual destinations therein.

For example, in 2007, Muskoka Tourism will operate on a budget of approximately \$885,000 per year and that includes operating two year-round visitor centres. The organization does appear to operate efficiently. For example, in 2006, the organization invested over 77% of its total budget in expenses related to marketing and despite lower revenues than the previous year, still managed to deliver 33% more programs. Compared to other destinations which commit between 50-60% of their budget to marketing expenditure, MTMA is delivering good value.

Annual Plan and Performance Measures

The DMO has an annual marketing plan but budget constraints prevent the delivery of anything other than core programs which include: operating two year-round visitor centres; maintaining the website; producing publications such as the vacation guide, map and other collateral brochures; participation in leisure travel, trade shows; managing

a spring and fall bulk brochure distribution to CAA, AAA and visitor information centres throughout Ontario and the U.S. border states; organizing media familiarization tours and providing media relations services; and providing visitor services via the 1-800 line, and responding to emails and inquiries received via in-the-door visitors.

There are insufficient funds to reach new markets or reinforce Muskoka as a brand with existing markets. The lack of funds prevents the organization from conducting research and producing broad-based awareness campaigns and niche marketing campaigns of any kind. Marketing efforts are restricted to basic programs aimed at the leisure traveller. Programs targeted to the travel trade and MCIT business are restricted to efforts by individual tourism operators. All of these issues combine to make it difficult for the destination to compete.

Destination Marketing Fee

The region has not implemented a Destination Marketing Fee, unlike many other icon destinations in the Province and this may seriously impede the region's ability to compete from a marketing standpoint.

Duplication of effort/lack of alignment

Within Muskoka there are several

organizations involved in servicing visitors and implementing marketing programs. The lead Destination Marketing Organization (DMO) is the Muskoka Tourism Marketing Agency (MTMA). Muskoka Tourism is the facilitator for the PRTD process. Economic Development offices, Chambers of Commerce, local Business Improvement Associations (BIA's) and individual tourism operators are also involved in marketing the destination but at a town/township or individual operator level. It has often been said there needs to be an alignment of effort on behalf of all these organizations to reduce duplication of effort and competition for available marketing and funding dollars.

Marketing Investments made by individual Tourism Operators

Tourism operators were also asked about their individual marketing plans, structure and investment. Not all operators were comfortable answering all the questions or sharing specific information related to their marketing spend, however a significant number were willing to share their range of investment with the project team.

For example, when asked if they had a marketing strategy in place, 445 operators responded. Of these, 54% reported they had a formal marketing plan in place while almost half did not.

When asked if they performed their own marketing activities, 225 operators responded with 82% saying they did it all themselves.

Finally, when asked about their level of marketing investment, 328 operators chose to respond. Operators were asked to state dollar range - from less than \$1000 to greater than \$250,000. The chart shown at right summarizes the responses. The range of investment contains assumptions based on the lowest level of investment to the highest level of investment in each range. Therefore, it can safely be said, that of those operators who chose to respond, the aggregate marketing investment would be between \$3.2 million and \$9.1 million per year. With over 1,000 tourism or tourism-related businesses in Muskoka, this is likely a very conservative estimate of the total marketing spend.

Another important point is that over 51% of respondents said they spent less than \$5000 per year on marketing - not a lot on an individual basis, but in aggregate, it is a significant investment. Therefore, there is a strong case for pooling resources, avoiding duplication of effort, and aligning marketing efforts to maximize available marketing dollars, especially for the 50% of respondents who have less than \$5,000 per year to spend. A full 35.7% for example, have even less to spend at under \$1,000 per year.

Tourism Operator Investments in Marketing					
Category	responses	%	low	mid	high
1000 or less	117.0	35.7%	11,700	58,500	117,000
1001 to 5000	67.0	20.4%	67,067	201,000	335,000
5001 to 10,000	40.0	12.2%	200,040	300,000	400,000
10,001 to 50,000	76.0	23.2%	760,076	2,280,000	3,800,000
50,001 to 100,000	15.0	4.6%	750,015	1,125,000	1,500,000
100,001 to 250,000	12.0	3.7%	1,200,012	2,100,000	3,000,000
Greater than 250,000	1.0	0.3%	250,000	250,000	250,000
Total	328	100%	3,238,910	6,314,500	9,172,000

Source: MAP Industry Survey 2006

Destination development planning

Tourism development plans don't exist within individual destinations (towns/ townships) or on a district-wide basis and there are no processes in place currently to consider the tourism development issues that face the destination. An Economic Development Study however, is currently underway by the District Municipality of Muskoka, and may well address some of these issues.

Customer Service Training

While customer service training is viewed as important, little or no region-wide initiatives are in place. Individual businesses conduct tourism hospitality or service training but there is a gap in delivering consistent quality training to front line hospitality workers. Chambers of Commerce have been instrumental in offering SuperHost training to their members. Without visitor survey data it is difficult to determine if hospitality and service performance is an issue and area of concern.

Product Renewal

This section identifies the extent to which Muskoka is making capital investments in its attractiveness into the future. The evaluation documents the status and magnitude of Muskoka's investment in the future.

In the past five years significant dollars have been invested in facility renewal and/or expansion and development with an emphasis on products that are directly or indirectly associated with tourism. A high percentage of this investment has occurred in the last two years. Source: MAP Industry Survey 2006.

Aside from major new developments, individual tourism operators in the aggregate have reported the following additional investments and improvements in their businesses. These numbers do not reflect additional investments made by those businesses that did not complete the survey.

- Golf \$4.2 million
- Accommodations \$6 million
- Festivals \$1,2 million
- Arts/Culture \$450,000
- Outdoor Recreation \$4.4 million

Under-developed & underperforming assets do exist. Golf courses are underperforming throughout the destination despite the fact that \$4,282,000 has been invested in the last 2 years to renovate or expand existing golf operations.

In addition to large scale projects such as the Muskoka Wharf, the new Red Leaves Resort Development has invested more than \$70 million of equity to date into building a world class resort which includes The Rock Golf Course (opened in 2004) a JW Marriott Resort Hotel (opening in 2008) and the future development of a village, a 700-acre nature reserve, a marina, restaurants, shops, a theatre and a revitalized Cleveland's House. The projected cost of the year-round, world class resort development is over \$500 million and will be built in phases over the next 10+ years.

Product Development

Responsibility for product development has not been clearly defined and is not currently part of the Destination Marketing Organization's formal mandate. Product development is key and the destination suffers from a lack of packaged experiences and fresh new ways of taking the destination's product to market. Muskoka would greatly benefit from defining and assigning responsibility for product and package development and investing the necessary resources to do so.



Managing Within Carrying Capacities

This section assesses the extent to which Muskoka is aware of, and manages within, its capacity thresholds specifically its local economy, ecosystems and soft services infrastructure, its guest's satisfaction levels, hard services infrastructure, and its administrative systems. The evaluation documents Muskoka's ability to manage the system that sustains it.

Local economy

The tourism industry in Muskoka is by far the District's largest industry and employer. No other sector in the region comes close to creating the jobs and labour income that tourism does.

In 2004, tourism generated close to 3,000 jobs and \$113 million in labour income. In the same year, 1.9 million visitors came to Muskoka and spent \$234 million in the region. That generated \$102 million in taxes for all levels of government, including over \$5 million in municipal taxes that accrued to the District of Muskoka. Overall, tourism in Muskoka generated direct, indirect and induced contributions to the gross domestic product of \$163 million. Therefore, a strong, vibrant tourism industry has a positive impact on all those who live, work and visit Muskoka.

Ecosystems, Infrastructure & Administrative Systems

Managing the carrying capacities of the natural systems that sustain local ecosystems and quality of life within Muskoka are well understood and monitored. It is recognized that growth in development related to tourism could impact infrastructure and the environment.

The Muskoka Watershed Council, Lake Associations, the District of Muskoka's Lake System Health Program and Municipal Planning Departments all play an active role in monitoring the environment. It appears each is prepared to understand and manage its futurity specifically related to water treatment and delivery capacity, sewage treatment and trunk capacity, road, transit, parking and trail capacity and the environmental effects of infrastructure expansions.

Property Taxes

Throughout Muskoka, property values and taxes continue to climb. This has been driven in part by lakefront properties that have been vastly improved, thereby increasing their value and the property taxes that go with such improvements. There is anecdotal evidence that some second home owners (who never rented out their properties before) are beginning to do so, to help combat higher taxes

for waterfront properties. Local real estate agents report that some cottagers are also moving off the lakes because of higher property taxes.

Permanent residents have also seen property tax increases due to the increased value of their homes as well as the costs associated with new developments in the area. It is unknown if this is causing undue hardship for permanent residents.

Health Care

An influx of second home owners during the high season burdens health care, especially as it relates to emergency room services. The health care impact of the anticipated retirement of many second home owners to region in the next few years and emerging fractional owners is unknown.

Police Services

An influx of visitors in the high season can also strain existing police services. The impact is not fully understood.

Price of goods

The price of essential goods rise exponentially in high season. For example, the cost of an average grocery basket increases which may put a strain on permanent residents. Overly inflated prices may also cause tourists and second home owners to feel they are being gouged.

An Excerpt from the *Muskoka Watershed Report*

Many organizations are involved in managing the regions ecosystems. For example, The Muskoka Watersheds Report Card produced in the summer of 2007 said "the health of Muskoka's environment is facing unprecedented challenges" and recommended that the following actions would be needed to protect our watersheds:

- Protect shoreline vegetation
- Reduced hardened surfaces
- Protect significant wetlands
- Reduce habitat fragmentation
- Maintain large natural areas
- Remediate degraded sites
- Contain urban sprawl
- Reduce carbon emissions

Crowding and overuse

Overcrowding and overuse are not being cited as issues of concern. At worst, traffic congestion and parking may be an issue during peak travel times and at large events. In some local areas, inadequate parking is being cited as a concern.

Labour challenges

There are definite labour issues in Muskoka. Semi-skilled labour is not readily available to work in the industry and several organizations go outside of the local area, province and even country to find staff. Even non-tourism businesses are impacted by labour shortages in the high season when some employees move to jobs in the hospitality industry. Of particular concern is the period of time following the labour day weekend in September through the autumn when students return to college and university, leaving many industry operators short-staffed.

The shortage of skilled trades and the professionalism of some businesses offering these services creates an additional operating challenge for tourism businesses that find it difficult to obtain timely, reliable, cost-effective trade services.

Labour issues are being looked at by many organizations but a plan has not yet been implemented to resolve

the problem. A recent Muskoka and Area Education and Training Needs Analysis Report produced in April 2007 by Precision Labour Focus highlighted areas of concern and recommendations.

The Report said: *“With its population growth, Muskoka Businesses are in demand and sectors such as food, accommodations and tourism experience high turnover and high absenteeism in the summer months, providing employers with higher recruitment and selection costs.”* *“Five sectors studied all show signs of current and future growth. In the five sectors, there is a demand for many types of workers, with the greatest centered on skilled trades, engineers, nurses, cooks, housekeeping staff, computer technicians and skilled artists such as potters.”*

Destination Success is a program developed by the Trillium Lakelands District School Board which offers students in grades 9 to 12 the opportunity to earn industry recognized certifications, to learn and practice the skills employers require of them for success in local careers and that connect them with the workplace through short term and long term “hands-on” work experiences. Several larger tourism operators are currently utilizing this program to help develop a hospitality labour pool of trained graduates.

In January 2007, an official announcement was released stating

that Nipissing University would be expanding its Muskoka Campus. Nipissing’s expansion will accommodate approximately 185 full-time equivalent students, or roughly 400 individual students, over a five-year period. With the potential expansion, the university is planning to offer expanded course selection and degree programs as well as continuing education opportunities. Students attending Nipissing will not only help to support the local businesses in the shoulder seasons, but may also provide a new labour source for the tourism industry. It will have the additional benefit of keeping talented young people in the region.

Affordable housing

Related to the labour issue is the lack of affordable housing in the region. This is frequently mentioned in the MAP Industry survey comments. Tourism operators explain that it is difficult to attract staff when there is a paucity of affordable rental properties and homes in the region.

Recently, a private developer has developed a concept called “StaffRes: Home for your Team” whereby the developer would build affordable staff housing in return for long-term lease agreements with resorts and other operators who are in need of affordable housing for their staff.

Guest Satisfaction levels

Guest satisfaction levels beyond a few individual tourism operators are unknown. Currently only 34% (154 out of 453) of respondents of the MAP Industry Survey said they utilize guest comment cards or surveys and there is no region-wide collection of guest satisfaction levels as they pertain to the broader Muskoka experience. This is a concern. Further, only 49% (124 out of 409) of tourism operators reported having a formal process in place for the resolution of customer complaints to ensure satisfactory resolution of problems.

Compensation & Training

Also related to the labour issue, is the fact that many hospitality jobs pay lower wages than other industries. It is important to note that wages are only one part of what enables an organization to attract and retain good people. Human resource experts agree that training and on-the-job development and recognition are critical to employee satisfaction which can also have a major impact on customer satisfaction levels. The MAP Industry Survey revealed that only 52% (124 out of 322) of respondents have a formal training program in place and only 30% (122 out of 340) of respondents have implemented a formal recognition program. Therefore, implementing such pro-

grams may represent an opportunity for tourism operators to attract and retain good employees without having to raise wages.

Local tourism plans

As it relates to understanding and capitalizing on the opportunities associated with a thriving tourism industry, local and regional governments make mention of tourism in their official plans but some may benefit from more specific goals and objectives.

Technology

Many operators need assistance with building a website or improving upon an existing one. Currently many tourism operators do not have websites and few offer online reservation systems or e-commerce. Part of this can be attributed to the fact that tourism operators located in remote regions may not have broadband connectivity and therefore managing websites without high speed is onerous. Also, many operators do not have the in-house expertise to manage, implement and invest in information technology concepts and strategies such as broadband e-commerce and marketing.

Therefore, an opportunity exists to help tourism operators obtain broadband connectivity and to help build their capability in information and communication technology especially

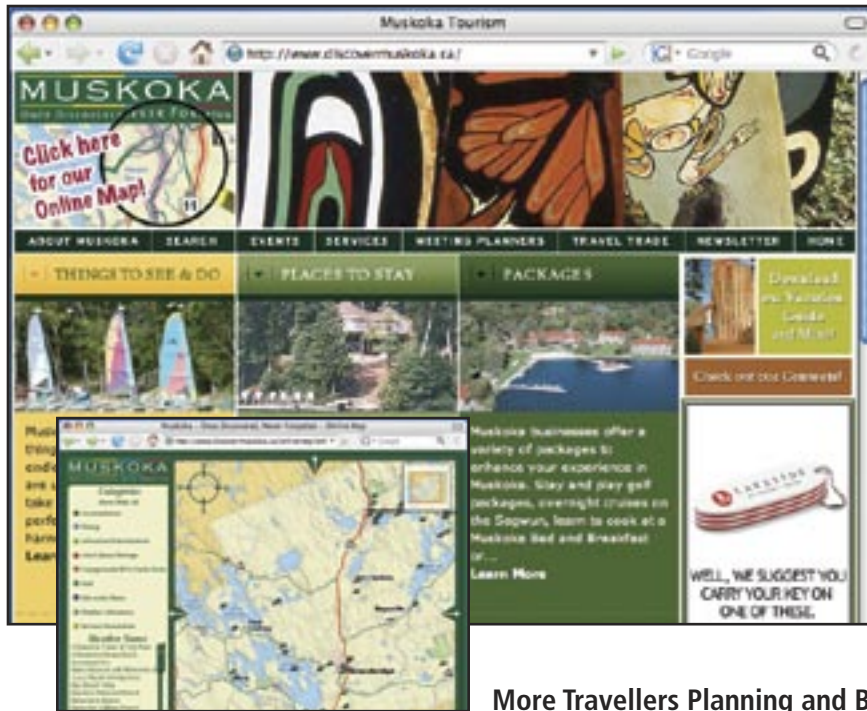
with respect to e-commerce and marketing.

Discovermuskoka.ca and other destination web sites within Muskoka could also be enhanced. This is especially important given reports that significantly more travellers plan and book trips online (see sidebar for more information) and websites allow tourism operators to market to the world.

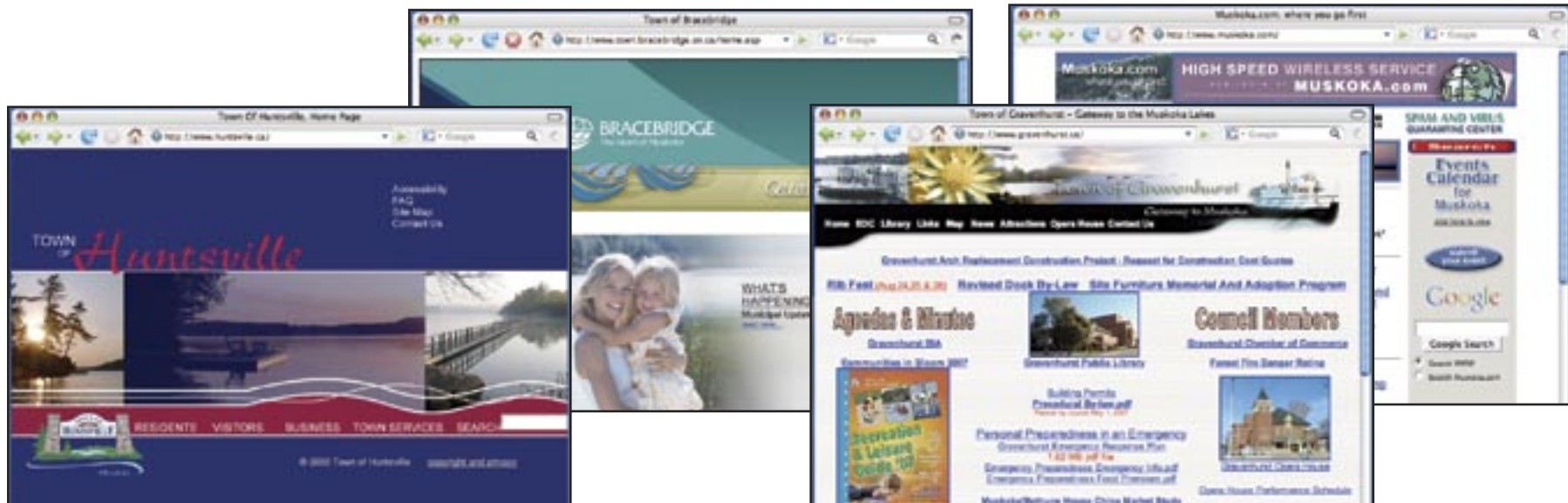
More Travellers Planning and Booking Trips Online

- 22 million Canadians and 211 million Americans are now online
- Nine out of 10 online travel planners use the Internet to plan a personal trip
- Most popular sites for travel planning are Expedia, Travelocity and Priceline (67%); search engine websites such as Google and Yahoo! (64%); and company-owned websites for airlines and hotels, etc.. (54%)
- Half of travel planners also use destination web sites such as discovermuskoka.ca
- Other travel planning sources have declined (Only 31% of respondents consulted a travel agent compared to 39% the previous year)
- 34% claimed to make travel purchases online and nearly eight in 10 (78%) use the Internet to do at least half of all their travel booking
- Airline tickets, lodging and rental cars continue to be the top three travel items booked online but there has been significant growth in online bookings for cultural events tickets, theme/amusement park tickets, travel packages and tickets for sporting events. *

* Source: Travellers' Use of the Internet, 2005 Edition



More Travellers Planning and Booking Trips Online





findings

observations

opportunities

recommendations

Significant opportunities exist to help Muskoka become a stronger, higher performing destination in the very near future.





Muskoka **A Premier-Ranked Tourist Destination**


Muskoka’s Performance as a Premier-Ranked Tourist Destination - Summary of Findings

At the outset of the report a measurement criteria was described that rates the destination’s status related to its performance for its Product, Performance and Futurity dimensions. After completing the Destination Performance Summary using the data provided through industry surveys and supplementary information, it has been determined that the destination has very positive scores related to its Product dimension but is lacking in a number of areas related to Performance and Futurity.

While two of three affirmations cannot be made for the Muskoka at this point in time, it should be noted that the destination has significant potential. It is clear that the product, and the positive attributes associated with it, set the stage for future development and in time, future success. Muskoka Tourism and its tourism industry stakeholders should be encouraged that the PRTD work has been completed and it has pointed out significant strengths but revealed gaps in the tourism offering. The process offers clear direction for improvement. It supports the premise that Muskoka has the opportunity to develop and emerge as an even stronger, higher-performing destination in the very near future.

<p>Product - A Tourist Destination provides a high quality tourist experience, enabled through the destination’s offerings of:</p>					 <p>Almost, the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation</p>
	# Attributes	Yes	Almost	No	
Distinctive Core Attractors	15	12	1	2	
Quality and Critical Mass	20	15	2	3	
Satisfaction and Value	6	1		5	
Accessibility	11	9		2	
An Accommodations Base	4	3	1		
Summary Score:	56	31	4	12	
<p>Positive attributes include:</p> <ul style="list-style-type: none"> ■ An attractive list of core attractors that stand out against the competition and are part of a regional complex of tourism experiences that are tied to the physical and historic setting of the destination ■ A number of memorable and unique tourism experiences that have both mass and niche appeals and keep visitors in the destination for periods greater than 24 hours ■ Accessible to a major population base (7 million people) located within 3 hours of the destination and is also in close proximity to both a regional and international airport ■ An excellent selection of accommodations options (3,426 rooms in resorts, brand name hotels/motels, lodges, B&B’s, etc., 2400 tent, trailer & RV sites and 34 children’s camps) at a variety of price points. 					<p>In order to improve performance in this area Muskoka must:</p> <ul style="list-style-type: none"> ■ Track customer satisfaction levels to determine quality of tourism experience offered, if staff are friendly/hospitable, if guests receive value for money – once known, industry must respond accordingly ■ Consider more animation of public spaces with free entertainment (buskers, musicians) in high traffic tourism areas where tourists congregate and especially in high season ■ Create additional off-season tourism products and experiences, especially in winter ■ Be “open for business”, with more businesses operating at hours conducive to tourists; open sooner in the spring, later in the fall with a good selection of product and experiences available in the winter ■ Improve way finding (signage) in specific tourist areas ■ Consider improving in-destination transit options (especially between towns/townships) and educate local taxi/coach drivers and car rental agencies on service delivery for tourists including tourism awareness ■ Attract more “branded” (widely known and respected) accommodators

<p>Performance - The quality of the tourist experience and the destination’s success in providing it is validated by:</p>					 <p>No, the affirmation cannot be made or supported for the destination</p>
	# Attributes	Yes	Almost	No	
Visitation	10	2	2	6	
Occupancy and Yield	6			6	
Critical Acclaim	5	2	3		
Summary Score:	21	4	5	12	
<p>Positive attributes include:</p> <ul style="list-style-type: none"> ■ Visitation that includes a high degree of overnight visitors compared to other destinations in Ontario, and visitors who stay for more than one night ■ While commercial accommodation occupancy is below provincial average, Room Rates (\$160 vs. \$120) and Revenue Per Available Room (\$80.20 vs. \$75) exceed provincial averages ■ Considered to have some critical acclaim and a “must see/must do” destination and some high-end Muskoka images are also used in Provincial tourism advertising and promotions 					<p>In order to improve performance in this area Muskoka must:</p> <ul style="list-style-type: none"> ■ Increase overnight visitation from guests beyond Ontario’s borders ■ Increase the number of trips for meetings and conventions ■ Increase its share of business from trips related to the trip types that match its core attractors (water-based features and activities, outdoor adventure, small town/village experience) ■ Increase quarterly visitation from key market segments especially in the 1st and 4th quarters ■ Increase annual occupancy of the commercial accommodation base to match provincial averages ■ Increase average visitor expenditures from both day and overnight guests, match provincial averages ■ Generate greater critical acclaim in order to be near or top of the list when trip decisions are made and to be considered a “must see/must do” destination ■ Be more proactive with provincial, national tourism marketers to promote appropriate key messages and images of Muskoka in their advertising ■ Be proactive as having its core attractors ranked as “best in class” or “top tier” ■ Attempt to have a longer list of its tourism products and experiences ranked “best in class” or “top tier”

Futurity - The ability for a destination to thrive from tourism into the future is sustained by:					 No , the affirmation cannot be made or supported for the destination
	# Attributes	Yes	Almost	No	In order to improve performance in this area Muskoka must:
Destination Marketing	15	12	1	2	
Product Renewal	20	15	2	3	
Managing within Carrying Capacities	6	1		5	
Summary Score:	11	9		2	
Positive attributes include:					
<ul style="list-style-type: none"> ■ There is market demand for the destination’s tourism products and experiences ■ Significant investment is being made in product development and renewal ■ Tourism is the largest industry and employer in the destination ■ Monitoring programs are in place to track visitor impact on local ecosystems and quality of life 					<ul style="list-style-type: none"> ■ Increase marketing budget of the DMO in order that they have sufficient funds to reach identified target markets through advertising/promotion ■ Tap into the expertise of receptive operators and travel trade to better understand their guest expectations and Muskoka’s strengths and weaknesses ■ Put in place a destination development strategy and monitor progress on key deliverables ■ Put in place district-wide customer service/hospitality training for front line workers and other community service organizations ■ Invest or reinvest in developing or revitalizing the destinations underdeveloped and underperforming tourism assets ■ Attempt to spread economic benefits of tourism across all parts of the District ■ Understand the impact of the destination’s attractiveness for recreation and retirement (health care, police services, housing, etc.) and put in place a process to monitor and ideally resolve this dynamic ■ Be proactive in understanding and solving labour shortage issues specifically related to tourism industry employers ■ Track customer satisfaction levels with annual Guest Surveys to determine quality of tourism experience offered, if staff are friendly/hospitable, if guests receive value for money – once known industry must respond accordingly with a proactive plan to resolve any issues ■ Fully understand where overcrowding and overuse is impacting capacity and thresholds of natural resources as well as guest experience and support the plans that are in place to rectify areas of concern (add new plans as needed) ■ Put in place a plan to accommodate water treatment and delivery capacity, sewage treatment and trunk capacity, road, transit, parking, trail capacity for projected levels of tourism

Observations and Opportunities

A formal Tourism Destination Development plan must be initiated

- To prioritize actions from the PRD process
- To incorporate these and other destination development initiatives

Although core attractors clearly position and differentiate the destination there exists opportunities for improvement

- many core attractors may be underdeveloped and/or underperforming - golf, resort experience for example
- Arts and culture are often overlooked in terms of their importance as a core attractor

- While 70% of the events take place in the summer and fall, there is room for event growth in the spring and winter. There is also room for growth for truly unique events that could take place on a regional basis
- The average visitor spending at a festival and event is \$80 so for every 25,000 visitors coming to the region, an additional \$ 2,000,000 of spending is delivered to the local economy. Source: Ministry of Tourism

Lack of trip planning tools and ability to pre-plan and pre-pay travel

- Web site enhancements may be needed.

While Muskoka has critical acclaim and top of mind awareness with many target markets, there is evidence to suggest that there are some markets that have no awareness of the destination.

- The changing face of the GTA mean certain ethnic markets may not be aware of Muskoka as a destination
- Some may consider Muskoka “unaffordable”
- No research has been done on those who have never visited Muskoka and why
- Budget constraints mean the DMO has focussed on leisure travellers,

opportunity to reach travel trade and Meetings, Conventions and Incentive Travel market

Effort to identify, attract & service visitors is under-funded

- DMO lacks sufficient resources to do the job effectively (people and dollars)
- Competing destinations have implemented Destination Marketing Fee (DMF) to be used for marketing and destination development initiatives
- DMF enables DMO to also leverage more partnership/funding dollars
- Long range marketing strategy must be developed.

Labour issues exist

- Reliable labour force is not available
- Service standards and training may be inconsistent
- Lack of affordable housing may contribute to labour issues
- Recognition programs are not being used as a tool to combat lower wages and job satisfaction

Getting to the destination presents a variety of challenges in peak and off-season

- Lack of taxi services and car rental facilities may be an issue
- Better way-finding signs to the interior of Muskoka may be needed on major transportation corridors

Day/overnight trip expenditures below average/declines in number of visitors and visitor spending

- Must attempt to extend length of stay of visitors and visitor spend
- Many operators close in the off season

Muskoka is still primarily a summer destination

- Attempt to drive visitation in all four seasons

Second home/fractional unit owners confuse tourism

- They ARE tourists, perhaps “unseen”
- They don’t behave like tourists do in other destinations
- They, and their visiting friends and relatives represent a huge VFR opportunity
- Impact of fewer traditional resorts/ more fractional ownerships need to be better understood

Role of all organizations with vested interest in destination development and tourism marketing need to be clarified and affirmed. These should include tourism roles and responsibilities of:

- Muskoka Tourism
- Community Futures Development Corporation
- Chambers of Commerce
- BIA’s
- Economic Development Departments
- Several organizations act and behave like a DMO

Lack of synergy and alignment in marketing efforts

- What’s good for Muskoka is good for every town and township
- Significant dollars are being invested in marketing by individual operators in the aggregate
- Audit of existing marketing communications materials may be needed
- Many operators lack dollars and expertise to market themselves

It is unknown if the destination delivers good service and value for money

- A comprehensive annual visitor survey is needed
- Individual operators need to ask guests about the broader

Muskoka experience and share this information

- Service/Experience delivery may be inconsistent
- Hospitality training beginning with owner operators is needed
- Creative staff attraction and retention policies are needed
- Survey comments suggest that delivery of visitor information services at town/township level need improvement

Importance of tourism is not widely understood and fully leveraged

- Most municipalities mention tourism in their annual plans but do not have concrete objectives
- Funding for destination development and marketing is not viewed as an investment in the communities economic well-being
- A better understanding of how tourism impacts resident quality of life is needed

High-speed connectivity along with a lack of in-house expertise to manage, implement and invest in information technology is an issue.

- Lack of broadband e-commerce and marketing tools may be impacting the visitor experience as well as tourism operator success

Recommendations

Based on the findings and opportunities revealed the following recommendations have been developed in consultation with the Premier-Ranked Steering Committee and tourism stakeholders within Muskoka. Both immediate and long-term action steps have been identified.

Continued Industry Engagement

The Premier-Ranked Tourist Destination process has provided a clear appraisal of Muskoka's competitive position in the tourism marketplace and a benchmark to measure future performance. A critical finding in other Ontario jurisdictions that have implemented the recommendations arising from their PRTD projects is having tourism industry "buy-in" and more importantly, proactive industry involvement in future strategic planning.

Immediate

Implement a Tourism Destination Development Plan ASAP

- This becomes the framework for recommendations coming out of the PRTD project
- It will rally the industry
- Define the scope, prioritize deliverables, secure funding/human resources - initiate in fall 2007
- It is the future Road Map for tourism development in Muskoka
- Must be aligned with District Economic Development Strategy, China Market Study, Muskoka Area Education & Training Analysis Report 2007 and other relevant studies
- Must be aligned with provincial and national tourism priorities where there is a fit.

Clarify the role of all organizations who have a stake in tourism marketing and destination development in Muskoka

- Conduct a marketing audit to better understand overall marketing activities of organizations and operators. This will:
 - Help coordinate marketing efforts
 - Determine if consolidation of efforts are needed
 - Create affordable marketing partnerships and/or co-ops

- Initiate a dialogue between all organizations (Muskoka Tourism, Chambers, BIA's, and Economic Development Departments) that have tourism as part of their mandate and agree on who does what - marketing, product development, industry relations, etc.
- Better tap into expertise of OTMPC, CTC, the Ontario Ministry of Tourism and IDO.

Introduce an annual visitor survey to track visitor experiences

- Don't reinvent the wheel, use an existing survey
- Empower Muskoka Tourism, Chamber's, BIA's, tourism operators to deliver
- Communicate findings to the industry.

Share comments received from survey respondents regarding gaps and opportunities with each town or township economic development officer and chamber manager

- Lack of affordable housing impacting ability to attract and retain workers
- Local issues related to retail hours, gaps in services, etc.
- Labour issues
- Other.

Mid Term

Grow tourism development & marketing budgets

- Introduce a voluntary Destination Development/Marketing Fee by Spring 2008
- Supplements current funding, better leverages partnership dollars
- Muskoka Tourism to lead this initiative in partnership with industry committee.
- Initial meeting held with tourism stakeholders — strong interest in proceeding.

Hospitality Training

- Develop an attitude of service excellence among owner operators, establish a Muskoka Standard of Hospitality Excellence/Code of Ethics
- Encourage BIA's, Chambers to continue to deliver SuperHost and encourage local municipal support for these efforts with promotion and funding
- Introduce a Hospitality Service Recognition programme to recognize and reward service excellence.

Better understand the second home owner / fractional unit dynamic

- Identify the challenges and opportunities, "*They are not the enemy*"

Long Term

- Educate the industry on how to cater to, service and capitalize on this market and growing visitor trend – hold workshops
- Work to preserve a strong inventory of short-term rental units, especially during peak season
- Assess impacts on off-season, employment, health care, etc.
- Ongoing research is needed to understand the dynamics of this market segment, invest dollars to do this on a regular basis.

Importance of Tourism

- Continue to target business leaders, influencers, residents, government officials and media
- Further improve presentations using the IDO's "*Making the Case for Tourism*" tool kit
- Empower the industry to be advocates for tourism, equip them with the facts
- Continue to implement *Tourism Inc.* workshops via regional tourism consultant
- Leverage tourism week to educate residents, cottagers, tourists through education
- Promote tourism as an industry / career to keep young people in the area.

Identify strategies and tactics to extend length of stay, grow tourism expenditures (day and overnight) and seasonality of visitation

- Conduct additional research on target markets, especially ethnic markets in GTA, travel trade and MCIT market and develop a strategic marketing plan
- Identify new "*reasons to visit*"
 - Sports Tourism
 - New circle tours and routes for niche markets
 - New, large regional special events in all seasons
- Develop Muskoka Ambassador program/guided tours
- Facilitate industry partnership through education, conduct OTMP Packaging seminars
- Create opportunities for dialogue between industry partners
- Bundle experiences, develop itineraries, package, take to market... experiences must have an overnight component
- *Open For Business* – improve hours of operation during peak and off-peak seasons (note: action can be taken immediately in some areas)

Examine the feasibility of creating the *Muskoka School for the Arts*.

- A celebration of the visual arts
- A heritage of visual arts "Group of Seven"/local talent
- A huge talent pool of artists and craftspeople live in Muskoka
- Education opportunities utilizing skills of local artists (Edu-tourism)
- Aligns with second home/cottage market profile
- Open 12 months of the year
- Capitalize on work already done by the area's college and university.

Re-examine the feasibility of creating the *Muskoka Hospitality Centre*

- Revisit potential for European-style hospitality institute in Muskoka
- Align with existing educational institutes – don't reinvent the wheel – take it up a notch to offer Elite culinary and hospitality training at a post-graduate level
- Keeps labour in market throughout the year and provides source of future career employees

Partner with Muskoka Community Network (MCN) to help Tourism Operators acquire broadband connectivity and help them with information technology concepts and strategies such as e-commerce and marketing. Promote:

- Satellite Internet for Remote Areas Program (SIRA) – new 2-way, ka-band satellite services for remote or rural businesses
- New Regional Broadband deployment
- Best Practices Workshops including e-commerce, technology management and website planning
- BEAM – Broadband for E-Commerce and Marketing Program – to be confirmed -- funding application has been submitted

Municipal governments throughout the region may want to officially sanction those providing tourism marketing support. For example:

- The official tourism website for Muskoka will be **discovermuskoka.ca**
- The official tourism website for town/township will be **www.town/township.com**

Conclusion

It is apparent that tourism and economic development stakeholders in the region have a strong desire to constantly improve and enhance the well-being and quality of life of its resident population and at the same time support the strong business community that is found in Muskoka. The completion of the Muskoka Assessment Project, using the Premier-Ranked Tourist Destination framework, is a shared initiative of the tourism industry and government and represents a significant step forward in ensuring this happens.

It is important to remember that Premier-Ranked is not a formal tourism designation but, rather an internal tourism goal to help destinations become “better than the rest” by improving their viability and competitiveness as a place people want to visit. Ultimately, the final determination of rank is less important than the insights gained through the process, and the conversion of those insights into actionable, achievable recommendations for improvement.

This report contains a series of recommendations that, if implemented, have the capacity to enhance job and wealth creation within local municipalities while contributing to the overall economic growth of the region, thereby enhancing the quality of life for all residents and the quality of the visitor experience at large.

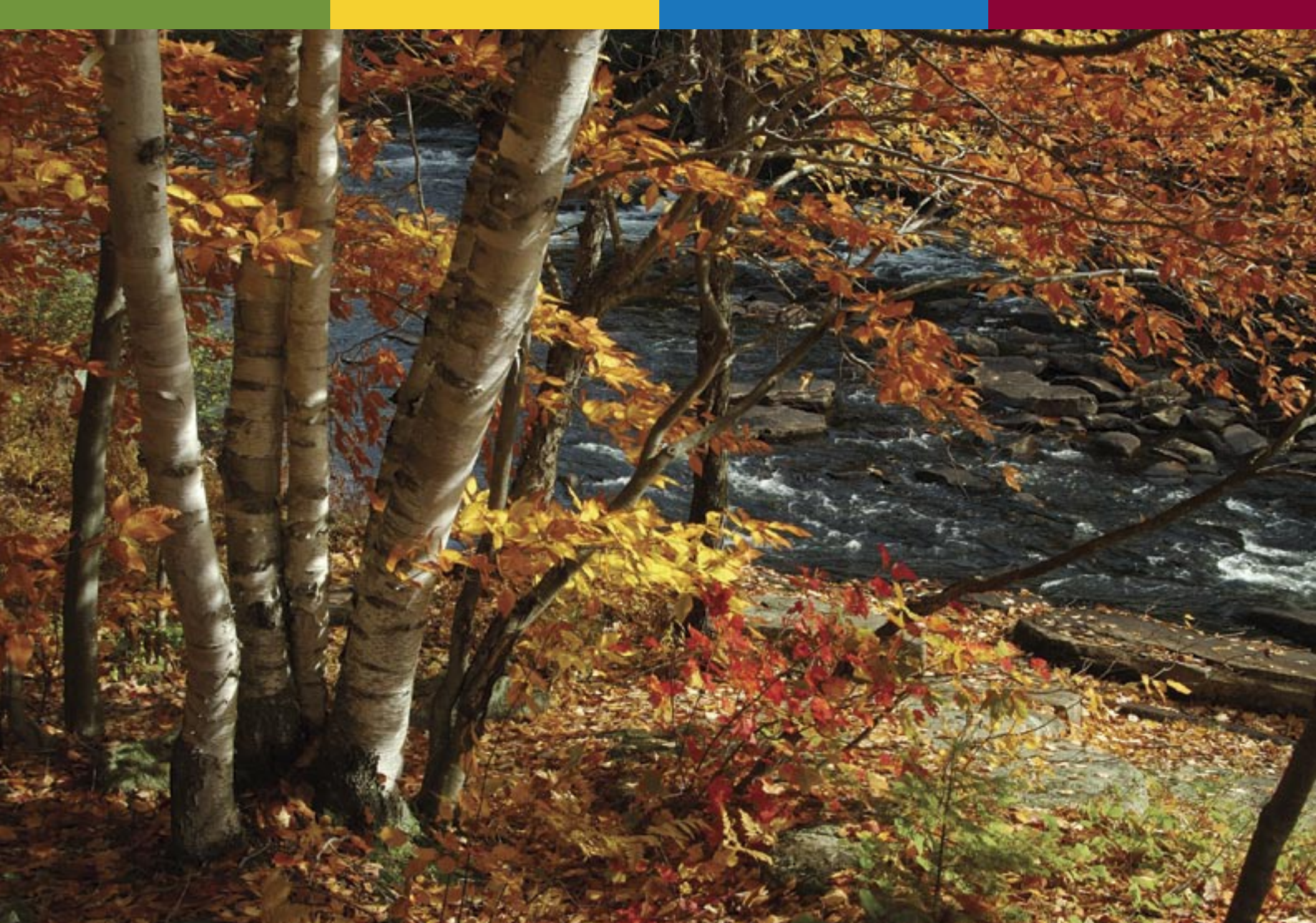
Using the Premier-Ranked Tourist Destination framework, the Muskoka Assessment Project has been successful in providing:

- A database of critical baseline tourism business data
- An understanding of Muskoka’s current state and destination status in the larger tourism marketplace and the opportunities and challenges constraining that status
- A solid base for preparing a long-term regional destination development plan and marketing strategy
- Product development and partnership opportunities and a foundation to attract tourism investment and create employment opportunities
- An opportunity to capitalize on investments made by the tourism industry in new product development, which in the case of Muskoka is significant

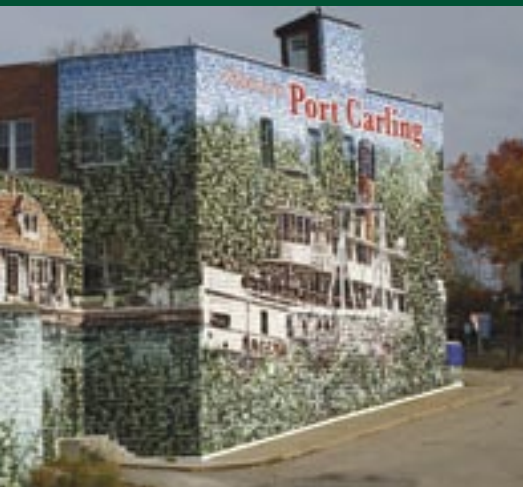
- Recommendations that support the growth and sustainability of the tourism industry as a whole
- An opportunity to increase overall revenues of tourism operators within the region
- An opportunity to improve the visitor experience and overall satisfaction with the destination.

The Muskoka Assessment Project is a shared initiative of the tourism industry, Muskoka Tourism and local governments. The successful implementation of the recommendations contained in this report is dependent upon a thorough understanding, appreciation, engagement and endorsement from all parties. As such, all partners must accept accountability for delivery if it is to be viewed as productive and sustainable over the long term.

Consultation was key throughout the process and as a result, it can safely be said that the tourism industry in Muskoka has endorsed the recommendations contained in this report. It is the culmination of many hours of diligent work, dialogue and compromise and there is no doubt that it will have a positive impact on all those who live, work and visit Muskoka.



Appendix
Bibliography
Glossary of Terms
Performance Summary
Core & Sector Survey
Aggregates



Muskoka A Premier-Ranked Tourist Destination

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Glossary of Terms

ADR: Average Daily Room Rate

B&B: Bed and Breakfast

BIA(s): Business Improvement Area(s)

Chamber(s): Chamber of Commerce(s)

Chef Du Cuisine: The highest professional culinary recognition and accreditation in Canada

Core Activities: Tourists' activities as they interact with a destination's core attraction(s) to create core experiences.

Core Attraction: The feature(s), facility(ies), and/or experience which act as the primary motivators for most travel to the destination; the attractions with the most tourist visits in the destination. Core attractions can differ from season to season, as in for example golf vs. skiing at a four seasons resort destination. They can overlap or be distinctly different for differing visitor segments, e.g., viewing the Horseshoe Falls vs. gaming in Niagara Falls; or mass vs. niche segments, e.g., viewing the Falls vs. exploring battlefields from the War of 1812.

A core attraction can also be the product of an assemblage of assets all relating to a specific theme, e.g., forts and battlefields in the Niagara-Queenston area, stations on the Underground Railroad; or an experience enabled by an assemblage, e.g., a resort experience supported by fishing, canoeing, dining and accommodations resources, a rural get-away experience supported by country road and trail, shopping, dining, and B&B resources.

Core Experience: The guest's experience of the core attraction or the experience that is itself the core attraction. As classified by Pine and Gilmore*, the guest's interaction with the attraction occurs along two dimensions: the first capturing the degree of the guest's "absorption of" to "immersion in" the

experience; the second capturing the degree of "passive" to "active" participation in the experience.

CTC: Canadian Tourism Commission, the national marketing body for tourism in Canada

CTS: Canadian Travel Survey

DMO: A Destination Marketing Organization - a generic term for any agency with a mandate to promote tourism in a geographic area.

FIT: The Fully Independent Travel market - visitors making their own plans and travel arrangements.

GTA: Greater Toronto Area

High Quality Tourist Experience: A travel experience which exceeds the guest's expectations.**

HRDC: Human Resources Development Canada

IDO: The Investment Development Office of the Ministry of Tourism Ontario

ITS: International Travel Survey

MCIT: Meetings, Conventions and Incentive Travel

Memorable Tourist Experience: A satisfying travel experience that lasts in the guest's memory, typically because he or she was engaged in a deep and lasting (i.e., in an out-of-the-ordinary) manner by their experience of the destination. A high quality tourist experience will be memorable for all the right reasons.

MTMA: Muskoka Tourism Marketing Agency

MTR: Ministry of Tourism and Recreation in Ontario

Niche Segments: Smaller market segments with a travel-motivating interest in a particular type of experience, e.g., a specific interest in good boardsailing opportunities vs. the mass market interest in a more generic sun and sand destination.

On-Theme Activities: Activities (uses made of features or facilities) that are related to the core attraction or the core experience. For example, if the core attraction is Niagara Falls, on-theme activities could be: dining with a view of the Falls; a trip on the Maid of the Mist and walking the trails in the Niagara Gorge.

Determining whether an activity is on-theme or not is often more grey than black and white. For purposes of using this framework, activities can be considered "on-theme" when they offer a different way of experiencing the core attraction, derive some of their attractiveness from their physical or logical relationship with the core attraction, or are themselves an intrinsic part of the core experience.

OTMPC: Ontario Tourism Marketing Partnership Corporation - The marketing wing of the Ministry of Tourism working in partnership with tourism operators in Ontario.

Product Positioning Statement: A brief description of what a product or service does, and its benefits using terms which set it apart from its competitors.

Receptive Tour Operator: A travel operator who specializes in packaging travel to the market area in which it is situated, for sale generally to visitors from other geographic market areas; an important resource in understanding market perceptions, needs and opportunities in a destination area.

Red Seal: Inter-provincial standard of National training and certification, allowing a chef to work anywhere in Canada.

Regional Complex: A term describing the situation in which individual tourism resources in an area are not sufficiently attractive to draw significant tourist visitation by themselves, but as a group attract visitation by virtue of complementing one another and creating a larger whole.

RevPar: Revenue Per Room

ROI: Return on Investments

RV(s): Recreational Vehicle(s)

Supporting Attraction: Features or facilities that draw guests to the destination area by giving additional but secondary reasons to travel there. Supporting attractions can be primary travel motivators (i.e. core attractions) to some markets (typically niche segments). They are generally distinguished from core attractions by their smaller number of visitors.

Travel Activities and Motivation Survey (TAMS) — a major study that identifies existing and potential travel markets in North America and provides information on place of residence, demographics and media use of these potential visitors.

Travel Agent: An individual or firm licensed under the Travel Industry Act to offer travel advice and bookings; an important resource in developing packaged travel opportunities in a destination area.

U.S. /U.S.A: The United States of America

VFR: Visiting friends and relatives - an important motivator for tourism travel. It also highlights the importance of marketing to local and regional residents.

* Pine, J. & Gilmore, J. 1999. *The Experience Economy: Work is Theatre & Every Business a Stage*. Boston: Harvard Business School Press.

** As expressed by S. Riley & J. Cunningham in their *The Magic of Your Success* presentation to the Tourism Federation of Ontario Conference, March 28, 2001.



Premier-Ranked Tourist Destination Performance Summary

Product



A. Distinctive Core Attractors



A1				A2	
A1.i	Y	A1.vi	Y	A2.i	Y
A1.ii	Y	A1.vii	Y	A2.ii	Y
A1.iii	Y	A1.viii	Y	A2.iii	Y
A1.iv	N	A1.ix	N	A2.iv	Y
A1.v	Y	A1.x	Y	A2.v	A

B. Quality and Critical Mass



B1		B4		B6	
B1.i	Y	B4.i	Y	B2.i	Y
B1.ii	Y	B4.ii	N	B2.ii	Y
B1.iii	Y	B4.iii	Y	B2.iii	Y
B1.iv	Y	B4.iv	A	B2.iv	Y

B2		B5		B7	
B2.i	N	B5.i	Y	B7.i	Y
B2.ii	N	B5.ii	A	B7.ii	Y

B3	
B3.i	Y
B3.ii	Y

C. Satisfaction and Value



C1		C2		C3	
C1.i	N	C2.i	N	C3.i	N
		C2.ii	N	C3.ii	N
				C3.iii	N

D. Accessibility



D1		D3		D4	
D1.i	Y	D3.i	Y	D4.i	Y
D1.ii	Y	D3.ii	N	D4.ii	Y
D1.iii	N	D3.iii	Y		
D1.iv	Y	D3.iv	Y		
D1.v	Y				

D2	
D2.i	A
D2.ii	Y

E. Accommodation Base



E1	
E1.i	Y
E1.ii	Y
E1.iii	A

Performance



F. Visitation



F1		F2		F3	
F1.i	Y	F2.i	A	F3.i	A
F1.ii	N				
F1.iii	N				
F1.iv	N				
F1.v	N				
F1.vi	Y				
F1.vii	N				
F1.viii	N				

G. Occupancy and Yield



G1		G2	
G1.i	N	G2.i	N
G1.ii	N	G2.ii	N
		G2.iii	N
		G2.iv	N

H. Critical Acclaim



H1		H2		H3	
H1.i	A	H2.i	Y	H3.i	A
H1.ii	A			H3.ii	Y

Futurity



I. Destination Marketing



I1		I3		I5	
I1.i	Y	I3.i	Y	I5.i	N
I1.ii	Y	I3.ii	N		

I2		I4		I6	
I2.i	Y	I4.i	N	I6.i	N
I2.ii	Y				
I2.iii	Y				

J. Product Renewal



J1		J2	
J1.i	Y	J2.i	Y
J1.ii	Y	J2.ii	A
J1.iii	Y		

K. Managing w/Carrying Capacities



K1		K4		K6	
K1.i	Y	K4.i	Y	K6.i	N
K1.ii	N	K4.ii	A	K6.ii	N
		K4.iii	N	K6.iii	N
		K4.iv	Y	K6.iv	Y

K2		K5		K7	
K2.i	N	K5.i	A	K7.i	A
K2.ii	N	K5.ii	N	K7.ii	Y
K2.iii	A	K5.iii	N	K7.iii	N
K2.iv	N				

K3	
K3.i	N
K3.ii	N
K3.iii	N
K3.iv	N

Legend

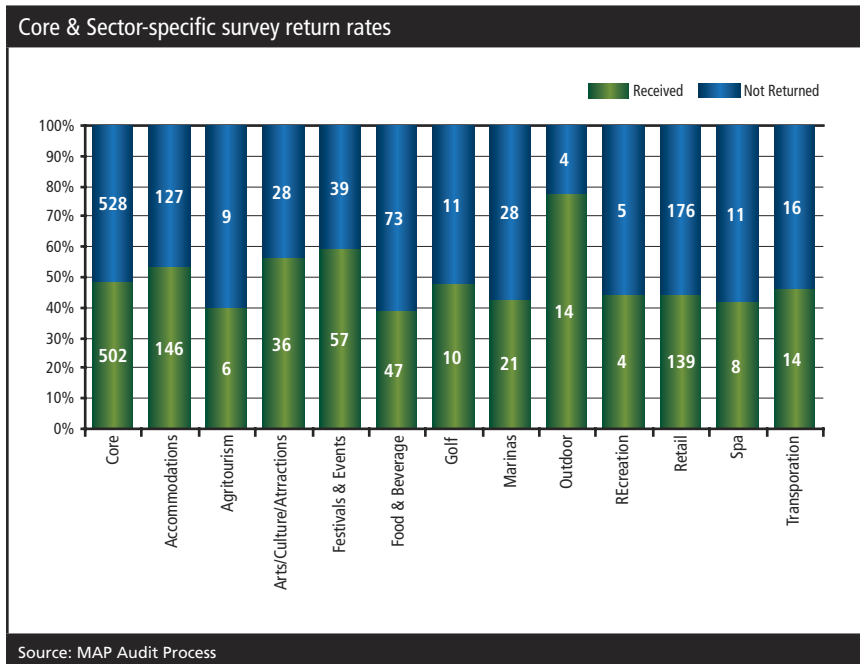
	Y	YES - the affirmation can be made and supported for the destination
	A	ALMOST - the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation
	N	NO - the affirmation cannot be made or supported for the destination

Aggregate Results

Core and Sector-Specific Surveys

At the outset of the Muskoka Assessment project, a database of potential tourism businesses was created and 1,100 surveys were delivered to companies representing all sectors of the industry. Of the 1,100 surveys, 502 surveys were returned, representing a response rate of 49%. Following is a summary of the response rates by sector which clearly shows that some sectors were more engaged than others. It is also important to note that not all respondents answered all questions in the survey. Therefore, the following core and sector-specific survey results should be viewed with a measure of caution as the responses may represent an extremely small sample size. Having said that, there is still some very valuable information to be derived from those tourism operators who did take the time to complete all the questions on their survey.

Return Rates



Core Survey Aggregate Results

Business Information

What is your primary business? CHECK ONE

136 (27%)	Accommodation
54 (11%)	Food and beverage
14 (2.8%)	Recreation facility
10 (2.0%)	Golf course
118 (24%)	Retail/Services
49 (10%)	Arts/Culture /Attraction
20 (4%)	Marina
6 (1%)	Spa/Salon
55 (11%)	Festival/Event
18 (4%)	Outdoor Adventure Tourism
10 (2%)	Transportation
0	Laundromats/Dry Cleaning
2	Pet Care
7 (1%)	Agri-tourism

What are your secondary businesses, if applicable? CHECK ALL THAT APPLY

14 (9%)	Accommodation
46 (28%)	Food and beverage
11 (7%)	Recreation facility
5 (3%)	Golf course
23 (14%)	Retail/Services
14 (9%)	Arts/Culture/Attraction
6 (4%)	Marina
8 (5%)	Spa/Salon
14 (9%)	Festival/Event
12 (7%)	Outdoor Adventure Tourism

2 (1%)	Transportation
2 (1%)	Laundromats
1 (1%)	Pet Care
4 (3%)	Agri-tourism

Please describe the ownership/affiliation of your business. CHECK ALL THAT APPLY

257 (49%)	Privately owned
111 (21%)	Corporate ownership
68 (13%)	Family owned
6 (1%)	National brand
12 (2%)	Publicly owned
3 (.5%)	International brand
51 (10%)	Not for Profit
19 (4%)	Franchise/Dealer

How many years has your establishment been in operation?

Less than 2 years	34.0	7.7%
2 - 5 years	88.0	19.9%
6 - 10 years	73.0	16.5%
11 - 25 years	117.0	26.4%
26 - 50 years	78.0	17.6%
51 - 100 years	39.0	8.8%
plus 100 years	14.0	3.2%

How many people do you employ?

Total	12,425
Full-time	2,856
Part-time	1,740
Seasonal	4,423
Volunteer	3,406

Do you have challenges with your staffing levels?

44%	YES
56%	NO

If yes, please indicate why.

135 (39%)	Seasonality
65 (19%)	Rate of Pay
35 (10%)	Housing
49 (14%)	Hours of work
22 (<1%)	Skilled Labour
7 (<1%)	Labour shortage

Do you host any annual events?

37%	Yes
63%	No

What nearby attractions, experiences or destinations support your business?

Heritage Sites - most common responses:

Muskoka Heritage Place	33
Bethune House	17
Segwun and Steamships	14
Woodchester Villa	9
Muskoka Boat & Heritage Museum	6
Robinson's General Store	6
Dorset Heritage Museum	5
Opera House	5
Algonquin Park	4
Downtown Huntsville	3
Arrowhead Park	2

Cranberry Farms	2
Kee to Bala	2
Muskoka Lakes Museum	2

Environmental Sites - most common responses

Algonquin Park	67
Trails	17
Waterfalls	15
Arrowhead Park	11
Lakes	10
Cranberry Marsh	7
Lake of Bays	7
Torrance Barrens	7
Lake Muskoka	6
Dorset Tower & Trails	5
Frost Centre area Crown Lands.	5
Rivers	5
Lake Rosseau	4
Lake Joseph	4
Muskoka Wildlife Centre	4
Bracebridge Falls	3
Georgian Bay Island National Park	3
Natural landscape	3
Wye Marsh	3
Aspen Valley Animal Sanctuary	2
Beaches	2
Georgian Bay Islands; moon faces	2
Gull Lake Park	2
Ragged Falls	2

Other Sites -most common responses

Santa’s Village	23
Summer Children’s Camps	13
Golf	12
Rivers and Lakes	9
Spring Art Tour	8
Hidden Valley Ski Area	7
Resorts	6
Cottages	5
Cranberry Marshes	5
Gravenhurst Wharf	5
Bigwin Island Golf Course	4
Downtown	4
Farmers Markets	4
Fishing	4
Huntsville	4
Artists	3
B.I.A. Downtown Events	3
Chamber of Commerce (BB)	3
Deerhurst	3
Muskoka Lakes Music Festival	3
Muskoka Steamships	3
Recreation Centre	3
The Wall (Port Carling)	3
Algonquin Theatre	2
Arenas	2
B&B’s	2
Boating	2
Chapel Gallery	2

Hockey/basketball tournaments	2
Muskoka Arts & Crafts	2
Muskoka Woods	2
The Tree Museum	2
Vacationers and cottagers	2

Sales Information

What methods of payment do you accept?

462(98%)	Cash
66 (14%)	Credit Card - one type only (e.g. MasterCard or Visa)
331(70%)	Credit Cards - accept more than one
303 (64%)	Debit/Interac
277 (59%)	Traveler’s Cheques
17 (<1%)	Accept Airmiles
7	Gift cards/certificates/ downtown dollars

Where can your products/experiences be purchased by the visitor?

407 (93%)	On-site
170 (39%)	Internet
53 (12%)	Through local 3rd parties in the destination such as ticket agents, local tour operators, etc.
59 (13%)	Through third parties outside the destination such as travel agents, tour operators, clubs, organizations
75 (17%)	Toll free number

In which languages do you provide service to your customers?

476(100%)	English
64 (13%)	French
4 (1%)	Chinese
24 (5%)	German
7 (1.5%)	Italian
5 (1%)	Japanese
22 (5%)	Spanish

Which of the following directional signage guides visitors to your site?

46 (46%)	Business Signage
86 (17%)	Regional TODS (White Blue)
57 (11%)	District Directional signs
112(22%)	Sandwich boards
58 (12%)	Provincial TODS
10 (2%)	Billboards

Which of the following services or facilities does your establishment provide for people with special needs?

155 (31%)	Entrance ramp
59 (12%)	Wheelchair accessible programs/ equipment
103 (14%)	Family washroom/changeroom
137 (27%)	Wheelchair accessible washrooms
102 (20%)	Wheelchair accessible food and beverage

Are you able to accommodate groups?

336(78%)	YES
95 (22%)	NO

What is your annual gross revenue range?

Up to \$50,000	107.0	27.9%
\$51,000 to \$100,000	48.0	12.5%
\$100,001 to \$250,000	58.0	15.1%
\$250,001 to \$500,000	46.0	12.0%
\$500,001 to \$750,000	25.0	6.5%
\$750,001 to \$1 million	13.0	3.4%
over \$1 million	78.0	20.4%
exact if willing to share	8.0	2.1%

Service Information

Do you provide customer comment or guest survey cards?

154 (34%)	YES
299 (66%)	NO

What percentage of your guests are very satisfied with their experience?

Less than 10%	6.0	1.8%
10% to 24%	1.0	0.3%
25% to 49%	1.0	0.3%
50% to 74%	4.0	1.2%
75% or more	330.0	96.5%

Do you have a formal process in place for resolution of unsatisfactory performance?

211 (49%)	YES
221 (51%)	NO

Do you provide customer service training for your employees?

124 (52%)	YES
198 (48%)	NO

If yes, most popular responses

In-House	69
Informal training by seasoned employees/owners	6
Adhoc	5
Delta Program	4
Smart Card	4
Corporate office driven	3
One on one	3
Product knowledge, service training	3
Super host	3
On the Job training - coaching	2

Do you have a recognition program in place for staff that provide outstanding service?

122 (30%)	YES
281 (70%)	NO

Has your operation or an experience that you offer been recognized by consumer or industry publications or received any awards of distinction in the last three years?

146 (35%)	YES
269 (65%)	NO

Communication Information

Has a marketing strategy been put in place to attract tourists to your business?

238 (54%)	YES
207 (46%)	NO

If yes, is your marketing outsourced?

41 (18%)	YES
184 (82%)	NO

What do you spend annually on marketing initiatives?

1000 or less	117.0	35.7%
1001 to 5000	67.0	20.4%
5001 to 10,000	40.0	12.2%
10,001 to 50,000	76.0	23.2%
50,001 to 100,000	15.0	4.6%
100,001 to 250,000	12.0	3.7%
Greater than 250,000	1.0	0.3%

What percentage of your business is repeat?

Less than 10%	18.0	4.7%
10% to 24%	30.0	7.9%
25% to 49%	50.0	13.2%
50% to 74%	101.0	26.6%
75% or more	181.0	47.6%

Corporate Citizenship

Which of the following do you take part in? CHECK ALL THAT APPLY.

111 (15%)	Environmental Stewardship
351 (49%)	Donations/Gifts in Kind to Community Groups
42 (6%)	Scholarships
126 (18%)	Sponsorships
43 (6%)	Sustainability

Future Sustainability

Would you be interested in taking part in opportunities to grow partnerships?

182 (70%)	YES
79 (30%)	NO

In the future, would you be willing to share data/results on your business that would be rolled into a comprehensive quarterly report to be shared with all tourism businesses.

Note: Only aggregate results would be reported - not individual business information.

265 (70%)	YES
117 (30%)	NO

What is the geographic origin of your guests on an approximate percentage basis?																								
Geographic Origin	Accommodations		Arts, Culture, Heritage, Attractions		Agri-tourism		Festivals and Events		Food and Beverage		Golf		Marina		Outdoor		Recreation		Retail		Spa		Transportation	
	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season	High Season	Low Season
Muskoka Year Round	2.3%	7.9%	23.4%	58.0%	38.1	31.7	52.6	50.4	31%	27.9	27%	53.9	8.5%		17.7%	44.0%	34.1	57.4	30.6%	57.6%	71%	67%	59%	
2nd Home owner	2.1%	2.5%	27.5%	9.3%	22	18.3	25.8	24.7	20%	18	27.9	14.3	40.7%		8.0%	3.6%	23.9	9	19.6%	13.2%	2%	16%	21%	
Central Ontario	7.8%	9.9%	11.0%	6.9%	2	1.7	8.9	8.5	5%	4.6	4.1	4.1	4.8%		12.3%	3.4%	7.2	3.2	5.6%	5.4%	10%	5%	3%	
GTA	42.7%	41.3%	17.1%	12.9%	30	25	5.2	5	29%	25.7	29.7	17.2	34.4%		40.2%	38.1%	22.7	25.4	13.1%	7.4%	17%	11%	3%	
Southern Ontario	22.7%	21.4%	6.5%	4.1%	0.4	0.3	4.2	4	2%	2.2	7	5.4	4.4%		14.1%	4.1%	5.2	1.4	16.8%	9.7%	0%	0%	10%	
Northern Ontario	4.2%	4.3%	1.8%	5.8%	2	1.7	2	1.9	1%	1.3	1.8	2.4	0.6%		1.4%	1.7%	1.6	1.8	2.5%	2.4%	0%	0%	0%	
National Outside of Ontario	2.6%	1.0%	1.2%	1.1%	0.4	0.3	0.5	0.5	2%	1.6	0.9	1.4	1.1%		0.6%	0.5%	3.2	1	2.9%	1.0%	0%	0%	0%	
United States Near Border	5.0%	3.3%	3.3%	0.3%	4.4	3.7	0.5	0.5	3%	2.7	1.3	0.8	2.2%		2.6%	1.6%	1	0.4	3.2%	1.3%	0%	5%	4%	
United States Other	1.5%	0.8%	3.1%	0.2%	0.4	0.3	0.1	0.1	2%	2.2	0.3	0.3	2.2%		1.4%	2.3%	0.6	0.4	2.2%	1.0%	0%	0%	0%	
International	9.0%	7.3%	5.2%	1.5%	0.4	0.3	0.2	0.2	4%	4	0	0	1.1%		1.7%	0.7%	0.6	0	3.4%	0.9%	0%	0%	2%	

Do you have a specific tracking strategy in place for determining the origin of your guests?												
	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Yes	50.9%	48.6	0	24	18	36.4	28.6	68.8	58.3	19.60%	42.9	33.3
No	49.1%	51.4	100	76	43	63.6	71.4	31.2	41.7	80.40%	57.1	66.7

What percentage of your business is:												
Percentage of your business is:	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Independent Travellers	72.9%	67.10%	42.5	85.1	66.40%	64.7%	not asked	57.3	52.70%	78.1	86%	66.7
Large Groups	2.5%	7.2	8.8	1.4	1	0.7%		3.3	0.8	3.3	0	33.3
Small Groups	15.2%	18.1	45	11.2	13.7	19.3%		17.3	24.2	13.1	7.6	
Individual Business Travellers	3.9%	5.5	0	0.6	5	3.8%		10.1	0	3.1	0	
Meeting/Conferences	5.2%	2	3.8	1.6	13.7	10.5%		11.4	21.5	2.1	5.4	
Incentive/Business Rewards	0.3%	0	0	0	0.01	0.9%		0.5	0.8	0.3	1	
Low Season												
Independent Travellers	65.6%	73.8	53.40%		58.50%	64.5%		70.8	50.2	80.5	85%	100
Large Groups	5.0%	6.3	13.3		2.6	1.1%		8.8	0	0.6	0	
Small Groups	15.4%	15.5	30		12.1	12.9%		9.5	13.8	12.4	8	
Individual Business Travellers	5.7%	2.30%	0		7	7.2%		1.4	0	3.5	0	
Meeting/Conferences	8.0%	2.10%	3.3		19.7	13.1%		8.8	34.7	2.7	6	
Incentive/Business Rewards	0.3%	0	0		0.01	1.1%		0.7	1.3	0.2	1	

Have your prices increased, decreased or stayed about the same in the last three years?												
Prices Increased Decreased	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Price changes last 3 years												
Stayed about the same	38.8%	73.8%	83.3%	91.3%	0.0%	61.5%	23.8%	35.0%	80.0%	68.1%	30.00%	40%
Increased	60.3%	26.2%	16.7%	8.7%	96.8%	30.8%	61.9%	65.0%	20.0%	24.8%	70.0%	50.0%
Decreased	0.8%	0.0%	0.0%	0.0%	3.2%	7.7%	14.3%	0.0%	0.0%	7.1%	0.0%	10.0%
Average Price Increased Decreased												
Increased	35.3%	100.0%	100.0%	100.0%	23.9%	39.2%	49.5%	100.0%	100.0%	6.3%	9.00%	9.0%
Decreased	64.7%	0.0%	0.0%	0.0%	76.1%	60.8%	50.5%	0.0%	0.0%	93.7%		10.0%

Has your total revenue changed in the last three years?												
Revenue Increased Decreased	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Revenue changes last 3 years												
Stayed about the same	44.0%	42.9%	66.7%	72.1%	not asked	12.5%	31.3%	44.4%	70.0%	38.6%	38.00%	56%
Increased	38.8%	31.0%	16.7%	18.6%		37.5%	62.5%	38.9%	20.0%	42.6%	50.0%	33.0%
Decreased	17.2%	26.2%	16.7%	9.3%		50.0%	6.3%	16.7%	10.0%	18.8%	12.0%	11.0%
Average Revenue Increased Decreased												
Increased	44.3%	90.9%	100.0%	56.8%		36.0%	22%	49.9%	100.0%	19.5%	42.5%	75.0%
Decreased	55.7%	9.1%	0.0%	43.2%		64.0%	10%	50.1%	0.0%	80.5%	20.0%	10.0%

Has visitation increased, decreased or stayed about the same over the last 3 years?												
Business Increased Decreased	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Visitation changes last 3 years												
Stayed about the same	45.4%	43.60%	33.30%	56.00%	24.50%	61.50%	23.80%	50.0%	77.80%	38.60%	43%	
Increased	29.4%	25.6	33.3	32	49.1	30.8	61.9	28.6%	11.1	42.6	43%	
Decreased	25.2%	30.8	33.3	12	26.4	7.7	14.3	21.4%	11.1	18.8	4%	
Average Visitation Increased Decreased												
Stayed the same												
Increased	14.3%	59.3%	83.3	57.4	69.70%	36%	49.5	71.9%	100%	20%	10%	
Decreased	85.7%	40.7%	16.7	42.6	30.3	64%	50.5	28.1%		80.5	5%	

Do you offer, or are you a part of a package that includes accommodations, restaurants, attractions or events?												
	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Yes	30.1%	22.90%	0%	20.40%	26.80%	70.00%	10.50%	50%	33.30%	6.40%	25.00%	12.50%
No	69.9%	77.10%	100%	79.60%	73.20%	30.00%	89.50%	50%	66.70%	93.60%	75%	87.50%
Would you be interested?												
Yes	63.5%	70.40%	60%	65.60%	73.80%	100%	42.00%	63%	57.10%	56%	50%	12.50%
No	36.5%	29.60%	40%	34.40%	26.20%	0.00%	58.00%	37%	42.90%	44%	37.50%	33.30%

Do you have a reciprocation program with other businesses that offer similar services?												
	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Yes	30.8%	26.70%	25%	not asked	15.80%	30%	39%	43%	22.20%	8.30%		33.30%
No	69.2%	73.30%	75%		84.20%	70%	61%	57%	77.80%	91.70%	100%	66.70%

Do you offer a unique experience/product that sets you apart from your competitors?												
	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Yes	68.1%	91.30%	80.00%	not asked	68.40%	60.00%	68.70%	79%	77.80%	70.30%	50%	55.60%
No	31.9%	8.70%	20.00%		31.60%	40.00%	31.30%	11%	22.20%	29.70%	50%	44.40%

How important is tourism to your business' growth?												
	Accommodations	Arts, Culture, Heri- tage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Not Important	5.6%	2.10%		5.60%			26.10%		8.30%			
Some what	11.2%	14.60%	42.90%	24.1	15.90%		30.40%	23.50%	41.70%	30.40%	33.00%	40.00%
Very Important	83.2%	83.3	57.10%	70.4	84.10%	100%	43.50%	76.50%	50.00%	69.60%	67.00%	60.00%

Does your current capacity enable you to meet the needs of a growing community?												
	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Yes	75.7%	86.60%	100%	98.00%	33.90%	83.30%	100%	100%	100%	81.40%	37.50%	100%
No	24.3%	14.00%		2%	66.10%	16.70%				18.60%	62	

In your opinion, is there a sufficient pool of trained labour in the area to support your business in the long run?												
	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Yes	50.5%	57.10%	60.00%	77.60%	33.90%	45.50%	20.00%	65.20%	50%	53.10%	50%	57.10%
No	49.5%	42.90%	40.00%	22.40%	66.10%	54.50%	80.00%	34.80%	50%	46.90%	50%	42.00%

Do you offer financial incentives to attract individuals/groups?												
	Accommodations	Arts, Culture, Heritage, Attractions	Agri-tourism	Festivals and Events	Food and Beverage	Golf	Marina	Outdoor	Recreation	Retail	Spa	Transportation
Yes	41.4%	30.20%	16.70%	10.90%	40.40%	not asked	0	50%	37.50%	34.0%	12.5%	33%
No	58.6%	69.80%	83.30%	89.10%	59.60%		100%	50%	62.50%	66.0%	87.5%	67%

Sector Survey: Accommodations Aggregate Results 149 Respondents*

* Not all respondents answered all questions

Please indicate what best describes the type of accommodation property you operate.

Bed/Breakfast	95.0	41.5%
Cabins/cottages	30.0	13.1%
Children's Camp	16.0	7.0%
Conference Centre	1.0	0.4%
Family Camping Open To All	1.0	0.4%
Hostel	1.0	0.4%
Hotel/Extended stay	27.0	11.8%
In remote location	1.0	0.4%
Inn	6.0	2.6%
Luxury Cottages	1.0	0.4%
Motel	12.0	5.2%
Private	3.0	1.3%
Resort	22.0	9.6%
RV park/campground	12.0	5.2%
Shared accommodation	1.0	0.4%

Is your establishment exclusive to certain groups?

Yes	19.0	21.3%
No	70.0	78.7%

What Amenities do you have on site? CHECK ALL THAT APPLY

76	Beach
54	In room internet access
70	Boat/Canoe rentals
38	In room telephone
39	Boat ramp
69	In room TV

56	Business support services (fax, internet, etc)
15	Indoor swimming pool
16	Childcare/Family services
36	Laundry
7	Concierge
21	Lifeguard
106	Drinking water
25	Outdoor swimming pool
17	Dumping facilities
61	Pay phone
28	Entertainment
90	Picnic tables
63	Firewood
66	Playground
20	Fitness facilities/centre
37	Planned activities
14	Full service spa
32	Sheltered area
37	Games room
85	Showers
26	Gift/Souvenir shop
7	Shuttle service to airport
4	Shuttle service to area attractions
22	Grocery store
1	Valet parking
77	Ice
6	Vending station per floor
68	Internet access
12	Snack bar
56	Swimming natural

FOR FIXED ROOF ACCOMMODATIONS ONLY

Please indicate the number of rooms/units on your property:

Non-smoking	2,199
Smoking	316
Presidential/Executive/Honeymoon/Family suites	326
King/Deluxe suites	407
Queen	668
Double	339
Single	58
Cottages/Cabins	483
Serviced, full or American Plan	251
Housekeeping units	174

Please indicate with a check mark the average price range per room/unit per night:

High Season		
Over 200	23.0	20.0%
\$151 to \$200	10.0	8.7%
\$101 to \$150	53.0	46.1%
\$50 to \$100	25.0	21.7%
less than \$50	4.0	3.5%
Low Season		
Over 200	8.0	7.8%
\$151 to \$200	9.0	8.8%
\$101 to \$150	43.0	42.2%
\$50 to \$100	40.0	39.2%
less than \$50	2.0	2.0%

Do you offer discounts for groups?

Yes	36.0	30.3%
No	57.0	47.9%
Does Not Apply	26.0	21.8%

Where is your accommodation property located? CHECK ALL THAT APPLY

3 km off hwy 11	1.0	0.3%
Across the road from lake	1.0	0.3%
All on waterfront	1.0	0.3%
Can arrive by boat	1.0	0.3%
In established tourist area	52.0	15.1%
In remote location	15.0	4.3%
In the downtown or core section of destination	23.0	6.7%
On a lake	78.0	22.6%
On a lake or river	76.0	22.0%
On a transit route	9.0	2.6%
On an access highway	37.0	10.7%
On the outskirts of town/city	49.0	14.2%
Rural residential	1.0	0.3%

FOR CHILDREN'S CAMPS ONLY

How many cabins are on your property:

504 total (14 respondents)

How many beds do you have?

Seasonal Beds	3,459
Year Round Beds	900

What is the cost of your camp experience?

Weekly Average	\$493.9
Daily Average	\$74.0

How many campers can you accommodate?

Up to 50	2.0
51 to 100	6.0
101 to 250	4.0
251 to 500	4.0
Over 500	1.0

How many counselors do you employ?

Up to 50	7.0
51 to 100	2.0
101 to 250	4.0
251 to 500	1.0

Please indicate which of the following best describes your camper's experience: CHECK ALL THAT APPLY

Adventure	13.0	21.0%
Bible teaching	1.0	1.6%
Christian Education	1.0	1.6%
Confidence and self-esteem building	1.0	1.6%
Cultural/Historical	4.0	6.5%
Education	13.0	21.0%
Entertainment	7.0	11.3%
Relaxation	9.0	14.5%
Religious Experience	1.0	1.6%
Skills development	12.0	19.4%

1. What programs and activities do you offer?

Archery	11.0
Arts and Craft	17.0
Badminton	7.0
Basketball	11.0
BMX Biking	1.0
Board Sailing	5.0
Canoeing	18.0
Climbing wall	1.0
Culture	1.0
Dance	11.0
Drama	12.0
Fishing	14.0
Fitness	7.0
Golf	2.0
Gymnastics	2.0
Hiking	1.0
Hockey	3.0
Horse back Riding	1.0
In-line Skating	2.0
Kayaking	14.0
Lacrosse	4.0
Leadership	3.0
Leadership Program	1.0
Mountain Biking	7.0
Music	9.0
Music Recording Studio	1.0
Out tripping	1.0
Paintball	1.0

Photography	2.0
Ropes course	2.0
Sailing	10.0
Skateboarding	2.0
Soccer	12.0
Swimming	18.0
Tennis	5.0
Theology	1.0
Trampoline	6.0
Volleyball	12.0
Wakeboarding/Waterskiing	6.0
Wind surfing	1.0

FOR CAMPSITES AND RV PARKS ONLY

How many campsites does your facility have?

Total Campsites	1,820.0
Unserviced	242.0
With Electricity	810.0
Full Season Rental	651.0
Transient	483.0
For RVs or Trailers	773.0

What are your current rates?

Daily Unserviced Minimum Rate	5.0
Daily Unserviced Maximum Rate	30.0
Average Unserviced Rate	24.9
Weekly Unserviced Minimum Rate	150.0
Weekly Unserviced Maximum Rate	180.0
Average Weekly Unserviced Rate	171.3

Monthly Unserviced Minimum Rate	525.0
Monthly Unserviced Maximum Rate	720.0
Average Monthly Unserviced Rate	615.0
Seasonal Unserviced Minimum Rate	1,150.0
Seasonal Unserviced Maximum Rate	1,400.0
Average Seasonal Unserviced Rate	1,275.0
Daily Electrical Minimum Rate	24.0
Daily Electrical Maximum Rate	45.0
Average Daily Electrical Rate	32.0
Weekly Electrical Minimum Rate	162.0
Weekly Electrical Maximum Rate	240.0
Average Weekly Electrical Rate	199.9
Monthly Electrical Minimum Rate	525.0
Monthly Electrical Maximum Rate	816.0
Average Monthly Electrical Rate	663.2
Seasonal Electrical Minimum Rate	1,150.0
Seasonal Electrical Maximum Rate	2,100.0
Average Seasonal Electric Rate	1,563.8

Sector Survey: Agri-tourism Aggregate Results - 6 Respondents*

*Not all respondents answered every question

Is Agri-tourism your main source of revenue or is it a supplementary source of income?

Primary Source	2.0	100.0%
Supplementary Source	0.0	0.0%

Has your acreage decreased as a result of urban development?

Yes	0.0	0.0%
No	3.0	100.0%

Do you reside on the same property as your agri-tourism business?

Yes	4.0	100.0%
No	0.0	0.0%

If yes, do you retain a portion of land for your personal use only?

Yes	1.0	33.3%
No	2.0	66.7%

Was your decision to operate an agri-tourism business a result of increasing global competition?

Yes	1.0	33.3%
No	2.0	66.7%

Does your business offer "pick your own" fruit and/or vegetables?

Yes	2.0	50.0%
No	2.0	50.0%

If yes, please specify which fruit and/or vegetables:

Berries and Vegetables		
Fruit/vegetables		

Does your business have animals/livestock?

Yes	3.0	60.0%
No	2.0	40.0%

If yes, please specify which animals/livestock:

Horses and cattle		
Cows		

Are you a certified organic farm?

Yes	1.0	25.0%
No	3.0	75.0%

What percentage of your production is organically grown?

30%		
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Do you consider your farm conventional?

Yes	0.0	0.0%
No	3.0	100.0%

Do you follow pest management and weed control methods?

Yes	2.0	100.0%
No	0.0	0.0%

Do you offer any of the following facilities/activities? CHECK ALL THAT APPLY

Barn	1.0	4.2%
Craft workshops	2.0	8.3%
Education	1.0	4.2%
Equestrian complex	1.0	4.2%
Gift shop	1.0	4.2%
Guided tours	2.0	8.3%

Hay rides	1.0	4.2%
Outdoor event facilities	2.0	8.3%
Petting zoo	1.0	4.2%
Picnic areas	3.0	12.5%
Playgrounds	1.0	4.2%
Public washrooms	4.0	16.7%
Sleigh rides	1.0	4.2%
Snack bar/ Restaurant	3.0	12.5%

Do you host any festivals/events on your property?

Yes	4.0	66.7%
No	2.0	33.3%

If yes, please list:

The Muskoka Star Party		
Special events featuring specific products plus giveaways, eg. Plants, strawberries, corn, cranberries, apples		
Blues Festival, Cranberry Festival		
Garden shows/speakers		

What local goods does your business sell? SELECT ALL THAT APPLY

Antiques	1.0	2.8%
Baked goods	3.0	8.3%
Cheese	1.0	2.8%
Cider	1.0	2.8%
Crafts	4.0	11.1%
Honey	1.0	2.8%
Juices	2.0	5.6%
Maple syrup	1.0	2.8%
Meat/Poultry	3.0	8.3%

Plants/Horticulture	4.0	11.1%
Preserves	4.0	11.1%
Preserves	5.0	13.9%
Produce	5.0	13.9%
Wine	1.0	2.8%

Do you sell any of your goods at any of the following farmers' markets? CHECK ALL THAT APPLY

Bala Farmers' Market	2.0
Baysville Farmer's Market	2.0
Bracebridge Farmers' Market	2.0
Dorset Farmers' Market	1.0
Gravenhurst Farmers' Market	3.0
Huntsville Farmer's Market	1.0
Rosseau Farmers' Market	1.0

Do you conduct group tours at your site (e.g. school field trips, business)?

Yes	3.0	60.0%
No	2.0	40.0%

Are you a member host of any farm tours?

YES	(0 - 0%)
NO	(4 - 100%)

Have you participated in any agricultural fairs in the past 12 months?

Yes	2.0	100.0%
No	0.0	0.0%

If yes, please list:

Minden, Carden, New York State, Severn Bridge

Our vendors have

Royal Ontario Winter Fair

Are there adequate opportunities for you to promote your services/products to the nearby urbanized areas?

Yes	5.0	83.3%
No	1.0	16.7%

If yes, please specify:

Advertising and word of mouth.

Word of Mouth

Muskoka Tourism Office and one in Barrie as well

Fairs and markets

Have you taken advantage of these opportunities?

Yes	6.0	100.0%
No	0.0	0.0%

Do you feel your business is self-sustainable over the next 5 years?

Yes	5.0	71.4%
No	2.0	28.6%

Do the various levels of government offer sufficient resources to assist you in your business?

Yes	3.0	50.0%
No	3.0	50.0%

What government resources have you accessed in the past 5 years?

Provincial and Federal

Farmers' Markets Ontario (FMO)

Dept. of Agriculture

Please indicate which of the following best describes your guest experience: CHECK ALL THAT APPLY

Cultural/Historical	3.0	15.0%
Education	3.0	15.0%
Entertainment	7.0	35.0%
Relaxation	5.0	25.0%
Retail, Shopping for fun	1.0	5.0%
Skills development	1.0	5.0%

Please rate the following sources of financial support by how often you have used them:

Financial Support	Never	Rarely	Regularly	Always
Federal Support	1			1
Provincial Support	1		1	1
Regional Support	1			1
Outside Investors	2			
Lending Institutions	2			

Sector Survey: Arts / Culture / Heritage / Attractions Aggregate Results 63 Respondents*

*Not all respondents answered every question

Which of the categories below best describes your business? CHECK ONE ONLY

Animal Show	1.0
Architectural Heritage Site	2.0
Art Gallery / Centre	17.0
Boat Tour	4.0
Club / Association	2.0
Crafter/Artisan	1.0
Cultural Tour	1.0
Entertainment	2.0
Event venue	1.0
Historic site	4.0
Living History Site	1.0
Local Heritage Site	4.0
Museum	6.0
National Historic Site	1.0
Natural Heritage Site	1.0
Painting Studio	1.0
Performing Arts Centre	2.0
Retail - Specialty Kitchen	1.0
Studio	13.0
Theme Park	1.0
Waterfall	1.0

Is your experience/product suitable for a broad range of mainstream visitors (mass) or is a specialized experience for a specific market (niche)? CHECK ONE ONLY

Mass	33.0	70.2%
Niche	14.0	29.8%
Please explain:		

Is your organization/membership exclusive to certain groups?

YES	5.0	(11%)
NO	41	(90%)

Where is your facility located? CHECK ALL THAT APPLY

Depends on Event	1.0
Home based	18.0
In established tourist area	20.0
In remote location	4.0
In the downtown core	20.0
On an access highway	16.0
On public transit route	4.0
On the outskirts of town / city	16.0
Red Leaves	1.0

What services/facilities do you provide? CHECK ALL THAT APPLY

Amusement rides	1.0
Architectural tours	2.0
Audio Visual education	4.0
Children's services	3.0
Classes	12.0
Educational Workshops	15.0
Flower Shows	1.0
Gallery	22.0
Garden	9.0
Group Tours	28.0
Interpretive programs / walks / tours	6.0
Live theatre / shows	7.0
Multi-destination Tours	2.0
Occasional Garden Tours	1.0

Overnight Tours	1.0
Petting zoo	1.0
Picnic Area	5.0
Pioneer Village	1.0
Private Exclusive Tours	25.0
Public access to archives	2.0
Public Internet access	5.0
Retail or Gift Shop	22.0
Scenic day Tours	5.0
Snack bar / Café / Restaurant	5.0
Train Ride	1.0
Transportation services as part of visitor experience	3.0
Walking Tours	10.0
Washroom	18.0
Workshops	16.0

Please indicate which of the following best describes your guest experience: CHECK ONE ONLY

Art	2.0
Being able to visit a studio seeing & seeing artist at work	1.0
Cultural / Historical	20.0
Education	4.0
Educational	3.0
Entertainment	12.0
Gift buying	1.0
Handmade Crafts	1.0
Photography	1.0
Relaxation	5.0
Shopping	2.0
Shopping Experience	1.0

Skills development	2.0
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Does your business offer special annual events?

YES	26	(55%)
NO	21	(45%)

Does your business offer special educational programs for schools or groups?

Yes	20.0	46.5%
No	23.0	53.5%

Is your business an historic site?

7	(16%)	YES
36	(84%)	NO

If yes, is your business any of the following?

Animal Show	1.0	1.5%
Architectural Heritage Site	2.0	3.0%
Art Gallery / Centre	17.0	25.4%
Boat Tour	4.0	6.0%
Club /Association	2.0	3.0%
Crafter/Artisan	1.0	1.5%
Cultural Tour	1.0	1.5%
Entertainment	2.0	3.0%
Event venue	1.0	1.5%
Historic site	4.0	6.0%
Living History Site	1.0	1.5%
Local Heritage Site	4.0	6.0%
Museum	6.0	9.0%
National Historic Site	1.0	1.5%
Natural Heritage Site	1.0	1.5%

Painting Studio	1.0	1.5%
Performing Arts Centre	2.0	3.0%
Retail - Specialty Kitchen	1.0	1.5%
Studio	13.0	19.4%
Theme Park	1.0	1.5%
Waterfall	1.0	1.5%

7.a) Do you offer live performances?

YES	15	(32%)
NO	32	(68%)

If yes, what types of live performances do you host and how many per year?

Animal Show Every Day
Tours and slideshow, around 12 per year.
At the ribfest - in august
Various live musical performances
Artist demos
Garden musicians
Demonstrations
Musical & Magical shows appropriate for young children
Theatre 6-8 weeks
Music, Theatre, Community Groups
Occasionally have artists on site demonstrating
Live entertainment, 6 - 20 times per year.
We call them demonstrations, and they are ongoing every day: blacksmith, candle-making, one-room school lesson, baking, farm animals
Magic Lantern Show
Ragtime Piano
Story telling and tours
Coffee house with live musical performances

10/year
We host live performances including dance, musical, drama, comedy, farce, etc. - approximately 150

Have you hosted artists with name recognition in the last 2 years?

YES	14	(42%)
NO	19	(58%)

Has your operational budget changed in the last 3 years?

Decreased	4.0	9.1%
Increased	14.0	31.8%
Stayed about the same	26.0	59.1%

What is your artistic medium? CHECK ALL THAT APPLY.

Carving	1.0
Ceramics and beads	1.0
Crafts	1.0
Drawing	1.0
Glass Blowing	1.0
Metal	1.0
Mural program	1.0
Non-Profit visual arts organization	1.0
Painting	15.0
Performing Arts	3.0
Photography	3.0
Pottery	4.0
Print making	1.0
Sculpture	2.0
Stained Glass	2.0
Textiles	2.0

Wood	4.0
Writing	1.0

From where is your funding derived on an approximate percentage basis?

Government	16.1	16.7%
Corporate Sponsorship	12.0	12.4%
Admission/Membership	34.3	35.5%
Other	34.1	35.3%

What is your current range of entrance/ admission fees?

Free / no admission	17.0	51.5%
Donation	5.0	15.2%
Voluntary Admission Fee	2.0	6.1%
Set Fee	9.0	27.3%

What is the average length of stay at your establishment?

Less Than 1 Hour	4
1-2 Hours	5
3-5 Hours	5
6-8 Hours	1

Do you offer a unique experience/ product that sets you apart from your competitors?

Yes	42.0	91.3%
No	4.0	8.7%

Have you invested capital to renew, expand or develop your operation?

Last 2 Years	On What
\$10,000	On Cages
\$30,000	Studio Addition

\$1,500	Mini Museum
\$100,000	Yacht
\$500	New Garden Development
\$35,000	Expanded Boat
\$4,000	Signage Gallery
\$3,000	Landscaping
\$100,000	Playgrounds attractions
\$10,000	Exhibits, advertising, print production, plate production
\$30,000	Tent and lights
\$50,000	Renovations, upgrades and maintenance
\$3,000	Displays, Exhibits
\$15,000	printing, framing, advertising
\$10,000	Doors
\$40,000	Painting
\$10,000	Murals

Last 3 Years	On What
\$18,000	Cages
\$3,000	Renovations, including washroom
\$1,500	New Garden Development
\$2,000	Gallery interior signage
\$400,000	New boat new rides new restaurant, animation
\$10,000	Exhibits, advertising, print production, plate production
\$60,000	Studio
\$150,000	Renovations, upgrades and maintenance
\$30,000	New roof, painting exterior
\$50,000	Facility improvement
\$10,000	Murals

Sector Survey: Festivals & Events Aggregate Results - 69 Respondents*

* Not all respondents answered every question

What is the name of your Festival or Event?

Annual Christmas Show & Sale
Annual Spring Member's Show
Annual Summer Show
Annual Wine and roses
Antique and Classic Car Show
Art in the Parkette
Autumn Studio Tour
Bala Antique and Nostalgia Show
Bala Cranberry Festival
Bala Santa Clause Parade
Bala Summer Market
Bandshell Concerts
Baysville Classic & Antique Boat Show
Baysville River Front Surf & Turf
Baysville Riverfront Project
Baysville Walkabout Festival
Bracebridge Antique Show
Bracebridge Fall Fair
Bracebridge Festival of Lights
Canada Day Celebrations
Cavalcade of Colour,
Chapel Gallery
Children's Fishing Derby
Classic & Custom Car show
Festival of the Falls

Gravenhurst Native Celebrations
Group of seven mural Festival
Huntsville Festival of the Arts
Huntsville Firefly Festival (Midnight Madness)
Kashe Craft Show
Muskoka Antique Show
Muskoka Lakes Spring Art Tour
Muskoka Novel Marathon
Muskoka Pioneer Power Annual Show
Muskoka Woodworking Show
Mutt Strutt - Mayor's Walk
Pond Hockey
Port Carling Winterfest
Shades of Autumn,
Spring Jam - Canada's largest ATV Jamboree
Summertime of Colour
Summer Garden Tour
Summer Sidewalk Adventure
Ten Thousand Villages Festival Sale
The Artful Garden
The Cottage Country Craft Show
The Muskoka Autumn Studio Tour
Dockside Festival of the Arts
Tree Lighting Ceremony
Trek to Bethlehem
Who Art Thou? A Mystery Art Sale
XCup Contest Series / Crew Challenge

What date was your festival, tournament or event established

1867	1988	1997	2003
1959	1989	1998	2003
1963	1991	1999	2003
1972	1992	2000	2003
1976	1993	2000	2005
1977	1993	2001	2006
1978	1993	2002	2006
1980	1996	2002	2006
1983	1996	2002	2006
1984	1996	2002	2007
1986	1996	2003	2007

What is the frequency of your event?

2 days	2.0	3.5%
2 days Sat/Sun June 2nd and 3rd 2007	1.0	1.8%
3 Days	3.0	5.3%
Annual Event (3 days)	1.0	1.8%
Monthly	1.0	1.8%
Multiple days	27.0	47.4%
Multiple single days	1.0	1.8%
Once weekly in July and August	1.0	1.8%
One weekend	1.0	1.8%
Single day	18.0	31.6%
Year round gallery exhibitions	1.0	1.8%

Where is your event located? CHECK ALL THAT APPLY

Arena	2.0	1.1%
At point of production	6.0	3.3%
Bailey Street	1.0	0.5%
Chapel Gallery	1.0	0.5%
Hanna Park	1.0	0.5%
In a business park	1.0	0.5%
In established tourist area	20.0	10.9%
In remote location	1.0	0.5%
In remote location	2.0	1.1%
In the downtown /core of area	28.0	15.2%
Lakefront	1.0	0.5%
Legion	1.0	0.5%
Lions Club	1.0	0.5%
Mall property	3.0	1.6%
Marina	1.0	0.5%
Off major highway	19.0	10.3%
On a transit route	8.0	4.3%
On the outskirts of town/city	7.0	3.8%
Private property	10.0	5.4%
Public park	21.0	11.4%
Public School	1.0	0.5%
Recreation centre	8.0	4.3%
Recreation centre	12.0	6.5%
Residential area near downtown core	1.0	0.5%
Seguin Trail	1.0	0.5%
Sports field	4.0	2.2%

The location changes depending on the number of participants	1.0	0.5%
Town Park	5.0	2.7%
Township of ML Parking Lot	1.0	0.5%
Waterfront	15.0	8.2%

What is the category or theme of your event? CHECK ALL THAT APPLY

Aboriginal Pow Wow/Celebration	1.0
Active Living message	1.0
Agricultural	5.0
Antique Collecting	1.0
Arts/Crafts	25.0
ATV Jamboree/Rally	1.0
Carnival	6.0
Children's festival	13.0
Cultural	10.0
Educational	11.0
Environmental	1.0
Farmers Market	3.0
Fashion/Retail	3.0
Food & Beverage	11.0
Fund Raiser	1.0
Fundraiser	1.0
Heritage	7.0
Historical	8.0
Hobby	1.0
Holiday	7.0
Horticultural	5.0
Motor Show	1.0

Musical	13.0
Parade	2.0
Religious	4.0
Season	8.0
Social	7.0
Special Event/Celebration	20.0
Sports/Tournament	3.0
Surf & Turf	1.0
Theatrical	2.0
Wakeboard/Wakeskate	1.0
Waterfront	3.0

From where is your funding derived on a percentage basis?

Government	9.7	9.8%
Corporate Sponsorship	10.7	10.8%
Admission/Membership	47.3	47.6%
Individual Partnerships	7.8	7.8%
Other	23.9	24.0%

What services and amenities do you offer? CHECK ALL THAT APPLY

Ambulance/First Aid	10.0
Amusement	12.0
Animal exhibit	7.0
Animal Rides	5.0
Art	3.0
Arts and crafts	1.0
Audio and visual	6.0
Bleachers	5.0
Buskers	7.0

Characters/Props/Mascots	6.0
Clowns	9.0
Comedy	5.0
Contest	12.0
Dancing	9.0
Demonstrations	1.0
Disc Jockey	9.0
Electricity	8.0
Entertainment	25.0
Face Painting	9.0
Fireworks	4.0
Flags/banner	5.0
Food and beverage	31.0
General Store	1.0
Inflatable's	2.0
Jugglers	1.0
Live Art Mural Painting	1.0
Lumber Jack Competition	1.0
Magician	4.0
Midway	3.0
Musicians	13.0
Obstacle course	1.0
Petting Zoo	3.0
Portable hand wash basins	6.0
Rock climbing	1.0
Route Guiding on Trails	1.0
Sanitation	16.0
Security/Policing	10.0
Signage	17.0

Sound and Lighting	12.0
Staging	12.0
Tents/awning/canopy	5.0
Ticketing	5.0
Transportation	4.0
Volunteers	25.0
Wakeboarding demos	1.0
Washrooms	3.0
Water fountains	4.0

Is there general admission fee to your event?

Yes	21.0	38.2%
No	34.0	61.8%

Is alcohol served at your event?

Yes	8.0	15.7%
No	43.0	84.3%

Is your event recognized at the following:

National	7.0	9.7%
Province	20.0	27.8%
Region	45.0	62.5%

Have you hosted artists with name recognition in the last 2 years?

Yes	22.0	44.0%
No	28.0	56.0%

Sector Survey: Food and Beverage Aggregate Results - 100 Respondents*

* Not all respondents answered every question

Please indicate which of the following best describes your visitors' experience: CHECK ALL THAT APPLY

Adventure	6.0	5.0%
Artisans in action	1.0	0.8%
Car Show	1.0	0.8%
Camaraderie	1.0	0.8%
Craft Sale	1.0	0.8%
Cultural/Historical	20.0	16.7%
Education	14.0	11.7%
Entertainment	34.0	28.3%
Family	1.0	0.8%
Fundraiser	1.0	0.8%
Gardening	1.0	0.8%
Market	1.0	0.8%
Memorable tradition	1.0	0.8%
Networking	1.0	0.8%
Opportunity to shop	1.0	0.8%
Physical Activity	1.0	0.8%
Relaxation	22.0	18.3%
Shopping	3.0	2.5%
Skills Development	6.0	5.0%
Spiritual Awakening	1.0	0.8%
Sports Challenge	1.0	0.8%
Vacation	1.0	0.8%

Where is your establishment located?

At point of production	3.0
Attraction	4.0
Banquet Facility	1.0
Golf Course	1.0
Home Based	4.0
Home Based	5.0
In a business park	1.0
In a gas station (kiosk)	1.0
In established tourist area	29.0
In remote location	5.0
In the downtown/core of area	30.0
Lakefront	1.0
Muskoka River	1.0
On a highway access	22.0
On a transit route	8.0
On the outskirts of town/city	18.0
Resort	13.0
Restaurant	20.0
Shopping centre	8.0
Sled Trail	1.0

What type of facility best describes your operation?

Private dinner parties and small receptions	1.0
Bakery	7.0
Banquet Hall	3.0
Bar/Tavern/Pub (e.g. sports bars)	9.0
Breakfast	2.0

Café/Coffee House	6.0
Casual dining/bar & entertainment	1.0
Casual Restaurant	22.0
Catering	3.0
Catering and Wholesale Production	1.0
Catering, off site	1.0
Deli/Bakery	6.0
Dining not restaurant	1.0
Fast Food	10.0
Fine Dining	12.0
Food retail	1.0
General store	1.0
Golf Course Snack Bar	1.0
Manufacturing of jams, etc.	1.0
Next yr. changing business	1.0
Provide breakfast with accommodation	1.0
Teashop	1.0
Winery/Brewery	1.0

What is the main style of cuisine served at your restaurant (i.e., Japanese, Italian, Indian, Vegetarian etc.)?

All homemade	
Assorted, (easy meals)	
Baked Goods	
Bar & Grill	
BBQ	
Breakfast	
7 Canadian	
Canadian, French	
Chicken	

Chicken/Ribs and Burgers/Fries	
Continental Cuisine	
Customized service	
Deli, soup, sandwiches, typically Canadian	
Eclectic	
English style sandwiches, light lunches and dinners	
Fine dining	
Fish and Chips	
Fresh Market	
Full service conference menu	
Fusion	
Haute Cuisine	
Healthy	
Healthy but not fanatical, featuring local Mediterranean produce	
Home style - Cape Breton - Seafood	
Home style and Canadian	
Hot dogs, sausage, soft drinks	
Ice Cream	
International with a regional twist	
Italian	
KFC chicken	
Lifestyle	
Mainstream North American	
Mexican	
Multicultural	
Muskoka inspired New World Cuisine	
2 North American	
2 Pub food	

(cont'd on next page)

Pub/Italian
Regional
Roadhouse Clipper menu items
Sandwiches/breakfasts
Soup and sandwich
Steak, Seafood and martini Bar
Steakhouse
Submarine sandwiches
Vegetarian/Health Food
Wings
World cuisine

How many seats are in your facility?

Indoors	Total: 4,200+
Average number of seats: 97	
Outdoors	Total: 2,060+
Average number of seats: 59	

What is your total facility occupancy?

Total: 6,892
Average occupancy: 181

What is the average cost of an entrée (excluding tax, tip and alcohol) ?

\$ 13.00

Is your establishment licensed?

Yes	38.0	58.5%
No	27.0	41.5%

What does your operation offer? CHECK ALL THAT APPLY

Banquets	48.0
Breakfast	28.0
Brunch	16.0
Buffet	19.0
Catering	60.0
Children's menu	29.0
Christmas Parties	1.0
Daily specials	34.0
Delivery	15.0
Dinner Menu	4.0
Entertainment	16.0
Entertainment Sunday pm acoustic Jam sessions	1.0
Golf Course snack bar - off of a BBQ	1.0
Heart Smart Options	18.0
I sell jars and gift baskets of preserves	1.0
Lunch menu	52.0
Meals on Wheels (Bala-Torrance Area)	1.0
Outdoor seating/patio	38.0
Parfaits	1.0
Private dining	35.0
Seasonal Festive parties only	1.0
Take-out	92.0
Toonie Tuesday	1.0
Weddings	1.0

Do you currently offer take-out box lunches to tour groups?

Yes	22.0	(34.9%)
No	41.0	(65.1%)

If yes, how many do you serve annually?

6,000+

Do you accept reservations?

Yes	28.0	(60.9%)
No	18.0	(39.1%)

How many chefs/cooks do you have? Please provide the number of each:

Red Seal:	53
Chef de Cuisine:	15

Please list the number and profile of alcohol labels that you serve.

Those with more than 25 labels carry between 30 and 425 labels.

Are your staff trained in any of the following?

Food Handler Certification	41.0	31.8%
Smart Serve	45.0	34.9%
WHMIS	43.0	33.3%

Is your establishment recognized outside of the region?

Yes	45.0	72.6%
No	17.0	27.4%

Whereabouts are your products available for purchase?

Internationally	4.0	5.7%
Nationally	6.0	8.6%
On-site only	50.0	71.4%
Provincially	6.0	8.6%
Regionally	4.0	5.7%

Do you serve locally produced food and/or beverages?

Yes	46.0	(68.7%)
No	21.0	(31.3%)

Suppliers Listed:

Battalia's
Beer: Lakes of Muskoka Brewery
Garlic: Big Ass Garlic
Bread Products: Windmill Bakery
Butter Tarts: Heather St. George
Bread: The Bakery
Meat Pies: Tall Trees Restaurant
Cranberries, sauces and jellies: Self made
Eggs: Ivanita Farms
Honey: Algonquin Honey
Sausage: Ivanita Farms
Maple Syrup: Emmes family
Meat: MuskokaMeats
Chicken: Chicken on the run
Fresh Produce: Sunrise Produce
Maple products: Maple Orchard Farms
Pastries: Deerhurst, Tall Trees, Windmill
Jams: Grandma's Summer Kitchen
Produce: Whittal's
Salad Products: Orillia Supplier
Products: Savour Muskoka
Cranberries: Johnston Cranberry
Water Muskoka Springs
Vegetables: Brooklands, and Kretchmor
Wines: Ontario

Do you have a qualified Sommelier at your establishment?

Yes	4.0	7.3%
No	51.0	92.7%

Are you a member of Savour Muskoka?

Yes	15.0	23.4%
No	49.0	76.6%

Has your establishment received an Eat Smart! Award of excellence?

Yes	1.0	1.7%
No	57.0	98.3%

Please check the culinary education programs that you offer:

Co-op Student	1.0	1.4%
Cooking school	4.0	5.8%
Cooking seminars with our chef and pastry chef, cocktail seminars	1.0	1.4%
Culinary Apprenticeship Program for Georgian College	2.0	2.9%
Culinary Apprenticeship Program with Georgian College	1.0	1.4%
Culinary Experience	1.0	1.4%
First Aid, babysitting, etc.	1.0	1.4%
Food and Wine	1.0	1.4%
Interactive cooking for groups	2.0	2.9%
None	33.0	47.8%
Other than apprenticeship training	1.0	1.4%
PP Certified Cooks	1.0	1.4%

Savour Muskoka dinners	1.0	1.4%
Team building workshops	6.0	8.7%
Wine Makers Dinners	1.0	1.4%
Wine/Beer seminars	11.0	15.9%

WINERIES & BREWERIES ONLY

Do you offer tours?

Yes	1.0	11.1%
No	8.0	88.9%

Do you have a tasting room?

Yes	1.0	14.3%
No	6.0	85.7%

Do you have a retail store on site?

Yes	1.0	14.3%
No	6.0	85.7%

Sector Survey: Golf Aggregate Results - 15 Respondents*

* Not all respondents answered every question

What type of golf course do you operate? CHECK ONE ONLY

9	Public	
6	Semi-Private	

Is your golf course located in a resort?

Yes	7.0	53.8%
No	6.0	46.2%

How many holes are offered?

18	10.0	76.9%
9	3.0	23.1%

What services and amenities does your golf course offer? CHECK ALL THAT APPLY

Beer/Beverage cart	11.0	5.7%
Child care services	2.0	1.0%
Club house	8.0	4.1%
Club rentals	14.0	7.2%
Conference/Banquet facilities	7.0	3.6%
Dining facilities	7.0	3.6%
Driving range	13.0	6.7%
Events planner	4.0	2.1%
Golf-cart rentals	12.0	6.2%
Hitting nets	4.0	2.1%
Licensed bar	11.0	5.7%
Lockers	5.0	2.6%
Mini putt	2.0	1.0%
Outdoor patio	13.0	6.7%
Practice putting green	11.0	5.7%
Pro-Shop	11.0	5.7%
Rain checks	11.0	5.7%

Showers/Change room	5.0	2.6%
Snack bar/Coffee shop	11.0	5.7%
Spa	2.0	1.0%
Tournament coordinator	6.0	3.1%
Tournaments	10.0	5.2%
Weddings	3.0	1.5%
Whirl pool	2.0	1.0%
Yardage markers	9.0	4.6%

Please describe your food and beverage facilities. PLEASE INDICATE YOUR CAPACITY IN EACH AREA

	For registered guests only	Open to the public
Bar/lounge	1	7
Casual dining	1	7
Fine Dining		1
Outdoor Patio		10
Other		

Do you have unique features at your course?

Yes	8.0	(88.9%)
No	1.0	(11.1%)

- Lots of rock
- Designer Robbie Robinson is a member of the Canadian Golf Hall of Fame
- White sand, elevated tee decks with wonderful views.
- Unusual elevations with great views many trees, many ponds, variety of wildlife
- Targets on the Range

(cont'd on next page)

We are the only links style course in Muskoka

Good walking or driving course.

How far in advance can tee times be booked?

1 week in advance	3.0	27.3%
2 to 6 days in advance	2.0	18.2%
More than one week in advance	6.0	54.5%

What is the cost of this year's green fees?

	9 Holes			18 Holes			
	Peak	Twilight	Off Season	Peak	Twilight	Off Season	Other
MIN	28	20	20	42	30	35	69
MAX	42	30	25	210	170	150	180
AVG	34	25	23	100	70	80	135

Do you offer golf lessons?

Yes	12.0	92.3%
No	1.0	7.7%

Do you offer any programs specifically geared towards groups?

Yes	9.0	90.0%
No	1.0	10.0%

Do you offer any special group rates?

Yes	10.0	76.9%
No	3.0	23.1%

Do you host specific annual events on your site?

Yes	6.0	(54.5%)
No	5.0	(45.5%)

Shier's 2-man better ball, Tagwagi

Specific group tournaments

Fund raising events

Pro Am

Fund Raising Events

We host corporate and family golf tournaments throughout the golf season

Repeat Associations Tournaments

How much does your annual membership cost/fees for a single adult?

\$1,500+	2.0	20.0%
\$50-\$350	1.0	10.0%
\$351-\$750	1.0	10.0%
\$750-\$1,500	6.0	60.0%

Do you offer any other incentives/privileges?

Yes	6.0	(75.0%)
No	2.0	(25.0%)

If yes...

Special green fee rates for frequent players

Early payment discounts

Early Bird Incentives

Early Bird Incentives

We offer the Skins card and we have our own coupon system

How many golf professionals work at your course?

22

Are your staff accredited?

Yes	10.0	(76.9%)
No	3.0	(23.1%)

C.P.G.A.

Superintendents have various accreditations.

Do you have a dress code?

Yes	12.0	(92.3%)
No	1.0	(7.7%)

Where is your facility located? CHECK ALL THAT APPLY

At the campground	1.0
In established tourist area	4.0
In remote location	2.0
In the downtown or core section of destination	1.0
On an access highway	2.0
On the outskirts of town/city	6.0
Resort	2.0

What are your busiest months?

June	2.0	7.4%
July	11.0	40.7%
August	10.0	37.0%
September	4.0	14.8%

What are your least busy months?

April	1.0	4.8%
May	10.0	47.6%
June	3.0	14.3%
October	7.0	33.3%

Do you have a strategy for slow times?

Yes	9.0	75.0%
No	3.0	25.0%

List of Strategies:

Lower rate strategy, tournament business

Most tournaments are booked in June or September

Low family membership fees

Reduced prices and special offers.

Tournament bookings, rate incentives, local promotions

Tournament Bookings, Rate Discounts, Local Promotions

Installed a golf simulator which operates inside the clubhouse

Sampling packages and ads in paper

Approximately how many rounds did you host this season (2006)?

Total from 11 respondents: 159,578

What percentage of golfers played during the following months?

April	4.2%
May	8.8%
June	14.3%
July	25.7%
August	28%
September	19%
October	5%

How long does it take to play your course?

2 - 4.5 Hrs.

Have you invested capital to renew, expand or develop your operation?

Last 2 years

\$500,000	Construction
\$1,100,000	Irrigation, Design Change
\$1,100,000	Expansion from 9 hole to 18 equipment and improvements
\$42,000	Renovations
\$1,200,000	Renovations
\$130,000	Simulator and cutting equipment
\$100,000	Club House
\$110,000	routine maintenance

Last 5 years

\$400,000	Equipment
\$78,000	
\$1,200,000	Renovations
\$450,000	cutting equipment
\$250,000	& Payroll

Do you have any plans to modify or expand your operation over the following time periods?

Growth/Development Plans, Year 1

Renovate the golf course.
Course improvements
Renovations
No
Introduce Memberships and Ladies Nights
No
Renovations

Growth/Development Plans, Year 2

Enlarge clubhouse
Renovations
Yes
Renovations

Growth/Development Plans, Year 3

Build a Clubhouse
Renovations
Yes
Build and construct new clubhouse
Renovations
Expand campsites/shower house/banquet facility

Sector Survey: Marina Aggregate Results - 21 Respondents*

* Not all respondents answered all questions on the survey

What is the nature of your marina?

Water based	20	(100%)
Dry based	0	(0%)

Is this a municipally owned marina?

YES	0	(0%)
NO	20	(100%)

Is the marina a member of the Clean Marine Program?

YES	15	(71%)
NO	6	(29%)

How many slips are at your marina? (15 respondents)

Total	Transient	*Seasonal	*
881	105	458	

*Not all marinas provide data for transient/seasonal breakdown

What is the MAXIMUM length of your slips?

Ranges from 14 to 100 (ft)

What are the MAXIMUMS for the draft?

Ranges from 3 to 20 ft (ft)

Which of the following services and facilities does your establishment provide?

1	Banquet facilities
10	Boat Operators courses
10	Boat rental
1	Private showers
1	Electronic access

6	Equipment rentals (i.e. water skis, etc.)
4	Floating dock
7	Free parking
17	Fuel dock
2	Gas barbeques
12	Haul out services
14	Launch ramp
1	Laundry
1	Marine travelift
2	Mast crane
18	Public washrooms
3	Pump out
18	Repair service/parts
19	Retail shop
2	Security
1	Showers
15	Shrink wrap services
6	Snack bar/food
5	Waterski/Wakeboard lessons
19	Winter storage

What is the length of your dockwall?

Ranges from 0 to 200(metres)

Do you provide storage?

Yes	15	(94%)
NO	1	(6%)
# of total spaces	4,800+	

Sector Survey: Outdoor Adventure Tourism Aggregate Results - 30 Respondents*

* Not all respondents answered each question

What activities do you offer? CHECK ALL THAT APPLY

1	Adopt a Park/Trail
1	Alpine skiing
3	Art classes
8	Bird watching
4	Camping
3	Canoeing/Kayaking
2	Jet skiing
5	Cross country skiing
8	Day trips
3	Dining
7	Fishing/Hunting
1	Fitness trail
1	Habitat Creation
7	Hiking-Day
1	Ski Shows
1	Hiking-Overnight
1	Ice skating
2	Ice surfing
2	Sailing
10	Instruction/Education
10	Interpretive programs/tours
3	Waterskiing
4	Mountain biking
11	Nature observation
1	Night skiing/boarding
1	Paintball
7	Photography
4	Power boating

1	Windsurfing
1	Scuba diving/Snorkeling
3	Shopping
5	Snowmobiling
8	Snowshoeing
2	Sugar bushing
6	Swimming
11	Wildlife watching

At what level are your services offered to visitors? CHECK ALL THAT APPLY

9	Beginner to novice
4	Certification training
14	Intermediate
14	All levels from beginner to expert
9	Expert advanced

How far in advance must services be booked?

3	Do not make reservations
3	Within 24 hours
4	One week in advance
8	More than one week in advance

From where is your funding derived on an approximate percentage basis?

Admission/Membership	59.3	71.4%
Corporate sponsorship/Private funds	13.8	16.6%
Government	7.0	8.4%
Other	3.0	3.6%

Do you recognize, celebrate or participate in any environmental awareness programs?

YES	11	(55%)
NO	9	(45%)

Do you teach the fundamentals of a greener lifestyle to your customers?

YES	15	(71%)
NO	6	(29%)

Do you use "Eco-tourism" to market your business/operation?

YES	8	(40%)
NO	12	(60%)

Does your operation possess or visit any of the following features? CHECK ALL THAT APPLY

2	Aboriginal heritage site/attraction
3	Archaeological features/sites
6	Benches/Seating Area
4	Bird sanctuary
5	Boardwalk
8	Lake
6	Wetland
5	Dam
6	Picnic site(s)
1	Pier(s)
8	River
1	Floodplain
4	Gardens
1	Help/Emergency facilities
6	Historic site

1	Information post or centre
6	Waterfall(s)
6	Creek
9	Waterfront
5	Wildlife Sanctuary
2	Woodland
7	Sandy beach
6	Scenic lookout(s)
4	Shelters
1	Valleyland
1	Viewing Platform
3	Emergency/Pay telephone
3	Lighting
6	Environmentally sensitive areas
1	Equestrian trails
6	Fire pit(s)

1. Do you provide guided tours (i.e. rail tours, boat tours, etc...)

YES	16	(80%)
NO	4	(20%)

What services and amenities does your operation offer? CHECK ALL THAT APPLY

1	All terrain vehicles (ATV)
1	Bait shop
1	Banquet facilities
1	Baseball diamond(s)
1	Basketball court(s)
2	Club house/chalet
2	Conference facilities

3	Barbeques/charcoal pits
3	Complete outfitting
4	Electrical outlets
4	Rental/Equipment shop
4	Dining facilities
1	Half pipe
2	Lockers
1	Multi-purpose fields
3	On site accommodations
2	Playground
3	Transport to the activity site
8	Maps
11	Public washrooms
3	First aid/first response staff
1	Volleyball courts
6	Showers/Change rooms
2	Skating facilities
4	Skier terrain
2	Ski/Snowboard school
1	Snowboard terrain park
2	Swimming/Wading pool
4	Partial outfitting
3	Ski/Snowboard rentals
1	Tennis courts

If yes, what is the total number and length in kilometers of your trails?

	# of Trails	Total Length (km)
Beginner/Novice	3	39
Intermediate	18	102
Advanced/Expert	4	26

Please indicate which of the following best describes your guest experience: CHECK ALL THAT APPLY

Adventure	16.0
Benefit Sled Run	1.0
Cultural/Historical	7.0
Education	6.0
Entertainment	4.0
Exercise	1.0
Outdoor adventure (non-motorized)	1.0
Participation	1.0
Relaxation	8.0
Resort	1.0
Skills development	8.0
Team Building	1.0

Does your operation provide a connection to a system of trails?

YES	8	(50%)
NO	8	(50%)

Sector Survey: Pet Accommodations & Services Aggregate Results

2 Respondents

What type of pets does your business accept? CHECK ALL THAT APPLY

2	Dogs
0	Cats

What services do you provide? CHECK ALL THAT APPLY

2	Day care services
2	One on one play time
1	Pet pick up services
1	Take pet on walks
2	Indoor Pens
1	Training/obedience classes
2	Outdoor Pens

What is the maximum number of pets you can accommodate at any one time:

Dogs	50
Cats	0
Other	0

Please indicate your average price per night:

	High Season	Low Season
Over \$51		
\$21 to \$50	1	1
\$16 to \$20		
\$11 to \$15	1	1
Less than \$10		

Where is your accommodation property located?

1	In the downtown or core section of destination
1	On the outskirts of town/city

What is your yearly range of operation?

2	Year Round
---	------------

Have you invested capital to renew, expand or develop your operation?

Was capital invested in the last two years?

Amount	On what?
61,000	Floors and general improvements

Sector Survey: Recreation Aggregate Results - 25 Respondents*

* Not all respondents answered every question

Where is your facility located? CHECK ALL THAT APPLY

At a Resort	1.0	4.8%
Attraction	1.0	4.8%
Children's Camp	1.0	4.8%
Georgian Bay	1.0	4.8%
In a business park	1.0	4.8%
In established tourist area	4.0	19.0%
In remote location	2.0	9.5%
In the downtown/ core of area	2.0	9.5%
Independent	1.0	4.8%
On a transit route	1.0	4.8%
On the outskirts of town/city	3.0	14.3%
Restaurant	1.0	4.8%
Strip Plaza	1.0	4.8%
Through out the municipality	1.0	4.8%

What amenities do you have on site?

Activity Classes	4.0	4.7%
Aerobics room	1.0	1.2%
Baseball and soccer fields	1.0	1.2%
Basketball court	3.0	3.5%
BMX track	1.0	1.2%
Bowling lanes	1.0	1.2%
Change rooms	5.0	5.8%
Childcare services	2.0	2.3%
Competitive sports training	2.0	2.3%
Exercise/Weight room	4.0	4.7%
Family change rooms	2.0	2.3%
Fitness Room	4.0	4.7%

Food services	2.0	2.3%
Full service spa	1.0	1.2%
Games room	1.0	1.2%
Ice rink Indoor	2.0	2.3%
Ice rink Outdoor	4.0	4.7%
Internet access	4.0	4.7%
Licensed restaurant	1.0	1.2%
Nutritional education	1.0	1.2%
Personal trainers	1.0	1.2%
Racquetball/Squash courts	2.0	2.3%
Retail store	3.0	3.5%
Self defense/martial arts	2.0	2.3%
Showers	7.0	8.1%
Skateboard park	2.0	2.3%
Snack bar	3.0	3.5%
Swimming lessons	2.0	2.3%
Swimming pool (indoor/outdoor)	2.0	2.3%
Tennis court	2.0	2.3%
Trails	2.0	2.3%
Trails with wildlife viewing	1.0	1.2%
Vending machines	3.0	3.5%
Volleyball court	4.0	4.7%
Whirlpool and sauna	2.0	2.3%
Yoga Studio	2.0	2.3%

From where is your funding derived on an approximate percentage basis?

Government	7.5	8.6%
Corporate Sponsorship	10.0	11.4%
Admission/Membership	48.8	55.7%
Other	21.3	24.3%

Do you offer any recreational sports?

YES	7	(70%)
NO	3	(30%)

If yes, please specify:

Hockey
Swimming, canoeing, kayaking, sailing, basketball, volleyball, skiing, snowshoes, hiking, field games...
Snowmobiling
Squash, volleyball, basketball, floor hockey, badminton
Snowshoeing trail

Do you offer any programs specifically geared towards groups (i.e. school groups, camps/retreats, special interest/community groups, etc...)?

Yes	8.0	66.7%
No	4.0	33.3%

Do you host any annual recurring tournaments that attract visitors?

YES	3	(30%)
NO	7	(70%)

If yes, please specify what kind of tournament, its location and dates(s):

Is your membership exclusive to certain groups?

Yes	2.0	20.0%
No	8.0	80.0%

If yes, please specify:

How much does your annual membership cost?

\$351-\$500	1.0	25.0%
\$50-\$200	1.0	25.0%
\$501-\$650	2.0	50.0%

Do you offer a discount rate for certain groups?

If yes, please specify:

Yes	6.0	75.0%
No	2.0	25.0%

Do you have day passes for visitors?

Yes	5.0	45.5%
No	6.0	54.5%

Is your membership interchangeable across locations or brands?

Locations	1.0	100.0%
Brands	0.0	0.0%

Are you competitive within the region in terms of rental prices?

Yes	5.0	83.3%
No	1.0	16.7%

Do you rent your facility to visitors from outside the local region?

Yes	4.0	57.1%
No	3.0	42.9%

Sector Survey: Retail/Services Aggregate Results - 141 Respondents*

* Not all respondents answered every questions

Where is your establishment located? CHECK ALL THAT APPLY

At point of production	8.0	3.9%
Attraction	2.0	1.0%
Golf Course Pro Shop	1.0	0.5%
Home Based	6.0	2.9%
Home Based	11.0	5.4%
In a business park	2.0	1.0%
In established tourist area	25.0	12.2%
In remote location	5.0	2.4%
In the downtown /core of area	76.0	37.1%
Muskoka Wharf	1.0	0.5%
On a highway access	21.0	10.2%
On a transit route	5.0	2.4%
On the outskirts of town/city	18.0	8.8%
Painting Studio	1.0	0.5%
Public boat docks and waterway	1.0	0.5%
Resort	1.0	0.5%
Retail - Specialty kitchen	1.0	0.5%
Shopping centre	16.0	7.8%
Strip Mall	2.0	1.0%
Uptown	1.0	0.5%
Was in a strip mall but will be home based as of January, 2007	1.0	0.5%

What best describes your business? CHECK ALL THAT APPLY

Antique shop/store	11.0
Art Gallery	17.0

Artists working studio	1.0
Bakery	2.0
Bookstore/Newsstand	12.0
Brewery Manufacturer	1.0
Cafe	1.0
Camp	2.0
Camp Rentals	1.0
Canadian Tire Store	1.0
Card Shop	1.0
Children's and maternity consignment plus new items for babies.	1.0
Children's products	2.0
Convenience Store	7.0
Corporate Apparel Showroom	1.0
Crafts	18.0
Deli and Kitchen Baking	1.0
Department store	5.0
Discount	1.0
Fashion/Clothing	33.0
Floral Shop	1.0
Footwear	1.0
Frame Shop Art Supplies	1.0
Furniture	12.0
Garden	9.0
Gas Bar	1.0
Gift Shop	39.0
Grocery	9.0
Hand crafted "Made in Canada" about 35% is local	1.0
Hardware	3.0
Home furnishings	18.0

Jewellery	19.0
Liquor Store/Beer/Wine	8.0
Long - arm quilting service	1.0
Music/Technology	3.0
Pharmacy	2.0
Pharmacy/home health care products	1.0
Pottery	1.0
Quilt shop	1.0
Retail bakery	1.0
Retail Hardware	1.0
Scuba Diving, Snorkeling	1.0
Service on-site embroidery	1.0
Specialty Shop	26.0
Sporting Goods	10.0
This store has no identity.	1.0
Tire Store, Car repair	1.0
Toys and games	2.0
Trophy Store	1.0
Unique Light & Sound of Rock	1.0
Wholesale only - sell to stores only	1.0

Does your business have recognition outside the region?

Yes	78.0	69.0%
No	35.0	31.0%

3. What services do you offer in your store?

Book signings	1.0	0.2%
Corporate Apparel Sales	1.0	0.2%

Custom orders large order discounts	1.0	0.2%
Dive Club	1.0	0.2%
Flowers	1.0	0.2%
Friendly Service	1.0	0.2%
Gift Certificates	98.0	20.3%
Gift Wrapping	50.0	10.4%
Information tour on bronze casting	1.0	0.2%
Lay Away	62.0	12.9%
Mail order or e-Commerce	39.0	8.1%
Mall Promotions	1.0	0.2%
Parking	1.0	0.2%
Private shopping opportunities	46.0	9.5%
Product demos/rental	1.0	0.2%
Regular promotional discounts/sales	75.0	15.6%
Shipping	55.0	11.4%
Sidewalk Sales	1.0	0.2%
Special events	42.0	8.7%
Special Orders	2.0	0.4%
Tours	1.0	0.2%
Workshops, Classes	1.0	0.2%

How would you describe your price point? CHECK ONE ONLY

Discount / Liquidator	3.0	2.4%
Mid-range / Average	91.0	73.4%
Prestige / High End	17.0	13.7%
Value	13.0	10.5%

Do you sell direct to the customer?

Yes	125.0	100.0%
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Describe products that your store carries. CHECK ALL THAT APPLY

A wide variety of labels and brands from several countries

Antique/Vintage Items
Antiques & collectables
Antiques from all nations
Antiques, Fun Things
Art Paintings
Canadian Artwork
Canadian branded goods
China
Custom unique goods
Internationally branded goods
Local Artwork
Locally produced goods
Old Time Candies
Service
Used books

Do you offer a discount card or loyalty program?

Yes	52.0	41.9%
No	72.0	58.1%

Are you a member or the following?

BIA	67
Chamber of Commerce	77

Do you have a washroom on-site for public use?

Yes	57.0	47.1%
No	64.0	52.9%

Please indicate which of the following best describes your guest experience: CHECK ONE ONLY

Adventure	7.0	7.5%
All of the above subjects are covered in our books	1.0	1.1%
Browsing for specific items needed - home deco/ antiques/furniture	2.0	2.2%
Camp	1.0	1.1%
Cultural / Historical	13.0	14.0%
Design, build	1.0	1.1%
Eating	1.0	1.1%
Education	7.0	7.5%
Enjoy & purchase locally/ Canadian made gifts souvenirs art & home furnishings	1.0	1.1%
Entertainment	15.0	16.1%
Family	2.0	2.2%
Grocery purchases	1.0	1.1%
Grocery shopping with wide choice of unique products	1.0	1.1%
Happy with purchase	1.0	1.1%
Leisure	1.0	1.1%
N/A	1.0	1.1%
Needs Purchase	1.0	1.1%
Other	1.0	1.1%
Pleasure	1.0	1.1%

Product/services for added value for homes and cottage	1.0	1.1%
Purchasing	1.0	1.1%
Quality service	1.0	1.1%
Relaxation	14.0	15.1%
Retail	3.0	3.2%
Retail Sales	1.0	1.1%
Satisfaction	1.0	1.1%
Shopping	5.0	5.4%
Skills Development	6.0	6.5%
Understanding customer needs and provide solutions.	1.0	1.1%

Do you offer financial incentives to individuals/groups who are new members?

Yes	3.0	60.0%
No	2.0	40.0%

Please indicate which of the following best describes your guest experience: CHECK ALL THAT APPLY

Adventure	6.0	25.0%
Cultural / Historical	3.0	12.5%
Education	3.0	12.5%
Entertainment	2.0	8.3%
Exercise	1.0	4.2%
Fitness	1.0	4.2%
Relaxation	4.0	16.7%
Skills Development	4.0	16.7%

What is the maximum number of guests that your facility can serve at any one time?

220
850
700
10
325
450
500

26. Please describe what are the main types of customers that come to your business

Individuals and family
Hockey Fans
Church groups, school groups and families with children
Members belonging to Curves
Families, sports minded people, fitness people, individuals wanting to check e-mail
Boaters, campers, sunbathers, sail boaters
Tourism, Locals, Groups

Have you invested capital to renew, expand or develop your operation?

Last 2 Years On What

\$70,000	Animal enclosures
\$120,000	
\$14,000	Equipment
\$500,000	Renovations
\$3,000	Equipment
\$20,000	Accessibility, maintenance

Sector Survey: Spas / Salons Aggregate Results - 14 Respondents*

* Not all respondents answered all questions

\$300,000	New Facilities
Last 3 Years On What	
\$140,000	Animal enclosures
\$120,000	

Do you have any plans to modify or expand your operation over the following time periods?

Growth/Development Plans 1 Year	
Renovations	
Expand Membership	
Growth/Development Plans 2 Years	
Renovations	
New kitchen - to accommodate large functions	
Growth/Development Plans 3 Years	
Renovations	

What type of spa/salon is your establishment? CHECK ALL THAT APPLY

Day spa	4.0	30.8%
Destination spa	1.0	7.7%
Massage Therapy Practice	1.0	7.7%
Resort spa	3.0	23.1%
Salon	3.0	23.1%
Therapeutic treatments from my home, not spa	1.0	7.7%

Where are you located? CHECK ALL THAT APPLY

Combined Professional Space	1.0	5.0%
Fitness facility	1.0	5.0%
Hair Salon	1.0	5.0%
Hotel	3.0	15.0%
In established tourist area	5.0	25.0%
In the downtown/core of area	4.0	20.0%
In the outskirts of town/city	2.0	10.0%
Independent	2.0	10.0%
On an access highway	1.0	5.0%

Do you offer financial incentives to attract individuals/groups?

Yes	4.0	44.4%
No	5.0	55.6%

What size is your spa/salon?

Ranges from 90 to 4,000 sq ft.

Please indicate the type of rooms you have on site specifically for spa customers:

	Number of Rooms
Treatment rooms	29
Change rooms	5
Washrooms	11

What treatments do you offer in your spa? CHECK ALL THAT APPLY

Facial Treatments

7	Facials
6	Exfoliation
4	Peels
6	Masks
6	Men's facial
3	Back facial
4	Anti-aging facial

Hair Removal

7	Waxing
1	Sugaring

Body Treatments

3	Wraps
7	Scrubs
2	Baths
1	Tanning
1	Sunless tanning

Therapeutic

4	Aromatherapy
6	Massage
1	Hydrotherapy
4	Reflexology
4	Hot Stone
1	Craniosacral therapy

Beauty Treatments

3	Hair styling/colouring
3	Brow/lash tint/bleach
3	Make-up
4	Manicure/pedicure
4	Paraffin

Non-surgical treatments

2	Microdermabrasion
1	Toning/cellulite treatment

Do you offer medical/cosmetic procedures?

YES	1
NO	8

What other amenities/services do you offer in your spa/salon?

Beauty products	7.0
Childcare services	1.0
Courses/training	1.0
Discounts	4.0
Gift certificates	8.0
In-home services	2.0
Private parties on site	5.0

Private suites	4.0
Robes/slippers provided	5.0
Sauna/steam room	5.0
Services for men	6.0
Showers	3.0
Valet parking	1.0
Whirlpool	5.0

Do you offer any of the following packages to your guests?

Bridal & special occasion packages	4.0	25.0%
Couples packages	4.0	25.0%
Day package	5.0	31.3%
Overnight packages	3.0	18.8%

Are your staff accredited?

YES	7
NO	0



Muskoka A Premier-Ranked Tourist Destination



MUSKOKA ASSESSMENT PROJECT

Premier-Ranked Tourist Destination Framework