PREMIER RANKED TOURIST DESTINATION FRAMEWORK

THREE COUNTY REPORT

FINAL

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BACKGROUND

The Premier Ranked Tourist Destination Framework (PRTDF) program was an initiative developed by the Ontario Ministry of Tourism in 2001. The goal of the PRTDF program is to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage and ultimately improve to become a destination of choice. Being a Premier Ranked Tourist Destination indicates that “here is a place more attractive than the rest, a place the potential tourist visitor should consider first when making travel plans.” To be clear, Premier Ranked is not a formal tourism designation but rather is an internal tourism goal for a destination to work towards as it relates to becoming “better than the rest”.

To assist municipalities with assessing and developing their tourism product, the Ministry of Tourism established a tool called the Premier Ranked Tourist Destinations Framework. This framework assists jurisdictions in assessing their tourist assets, attractions and amenities and allows them to identify opportunities in tourism development. The Ministry of Tourism provides financial assistance to regions that successfully apply to undertake the PRTDF process.

The Norfolk, Elgin, Haldimand Counties PRTDF project is an initiative facilitated by the lead tourism organizations in each County, the Ontario Ministry of Tourism, Employment Ontario, and tourism industry stakeholders. The funding for the project came from Employment Ontario, the Government of Canada, and the Ontario Ministry of Tourism.

The Ministry of Tourism agreed to fund the PRTDF work with the understanding that the three identified tourism destinations would work together ***as a collective*** under the umbrella of the lead partners. The lead partners are represented by:

- St. Thomas–Elgin Tourist Association
- Haldimand County Tourism Division
- Norfolk County Tourism and Economic Development Division

The end result would see individual PRTDF projects being completed in each of these three destinations as well as one regional report being produced ***as a collective***.

To assist in that process and to develop this regional PRTDF report the tourism consulting firm BRAIN TRUST Marketing & Communications was retained. BRAIN TRUST also completed the three individual PRTDF projects.

Develop a Unified Regional Strategy - We understand the requirement to look at each of the three counties separately as well as a collective. We will develop specific reports for each of the three counties as well as specific recommendations that will help the collective counties focus on those areas where attention can be directed together.
Brain Trust proposal – June 27, 2007

In order to complete the region-wide report the consultant worked with the senior staff in each Destination Marketing Organization (DMO) to identify future region-wide experience and product development initiatives.

A tourism resource audit was carried out in the form of a detailed survey of establishments <u>in all three destinations</u> in the which asked respondents to describe their operations, services offered, customer base and tourism awareness among other questions. The survey was mailed to establishments from the Accommodations, Food and Beverage, Attractions and Retail sectors. Survey results were compiled in a comprehensive database maintained by the Audit Team in each destination. The culmination of that work resulted in the development of three destination specific PRTDF reports.

PRODUCT - NORFOLK, ELGIN, HALDIMAND COUNTIES

Through the comprehensive audit that was conducted as part of the destination specific aspect of the PRTDF process the nature and magnitude of the specific tourism products of the area has been captured.

Core & Supporting Attractors

The evaluation process has identifies the destinations core attractors, their distinctiveness, and the nature and size of the visitor markets to which they are to be considered to be attractive. This section assesses:

- *What it is about a destination that makes it stand out as distinct in the marketplace*
- *How the attractors are distinguished*
- *How the attractors are relevant to market wants.*

Elgin County

- Water Based Activities
- Railway Heritage
- Small Town/Village Experience
- Outdoor Recreation

Haldimand County

- Auto Racing and Motorsports
- Outdoor Recreation: Canoeing / Kayaking, Birding
- Heritage: Historic Sites & Events

Norfolk County

- Outdoor Recreation: Birding, Cycling, Hiking
- Small Towns and Rural Landscapes
- Authentic Coastal Towns With a Beach/Boating Culture
- Sport Fishing/Angling
- Norfolk County Fair/Horse Show and Fairground

- The areas tourism products and experiences have both “mass” and “niche” appeal and provide visitors a wide variety of things to see and do.

Mass	Niche
Water Based Activities, Beach	Hiking
Attend a Festival/Event	Boating
Fishing (as a past time)	Fishing (avid)
Shopping	Birding
Sightseeing	Walking/Cycling Trails
Golfing	Historical points of interest
Visit Provincial Park	Hunting

Current Observations

The following observations are made, based on an analysis of the surveys received from tourism businesses and stakeholders across the Norfolk, Elgin, Haldimand area, using the matrix model and on secondary research obtained from the Audit Team in each destination:

- Most of the products and experiences are available to visitors at a variety of price points
- The attractors have limited appeal to guest from beyond Ontario’s borders.
- While many of the tourism experiences are available for at least nine months of the year, most are not available on a year-round basis
- Most of the tourism experiences, individually, do not generate visitation for periods greater than 24 hours
- The region offers a selection of dining experiences, and there is growing recognition of local food sources and culinary tourism; few dining experiences have name recognition outside the area; a small number feature well known accredited chefs or offer wine lists with more than 25 labels
- The region presents a variety of retail shopping experiences, some are independently owned and offer a unique selection of merchandise; however, most shopping experiences do not have name recognition beyond the region, apart from Port Dover
- Transportation to the area, other than with personal vehicle, is very limited; once visitors get to the destination there is limited travel options unless they have a personal vehicle

- The visitors' opinion of the guest experience is not clearly understood, due to a lack of resources for visitor surveys; as a result, the destinations' offering, individually and therefore collectively, is not considered superior because that conclusion cannot be drawn based on no survey data
- Part of the area is located on the UNESCO Long Point World Biosphere

- There are 16 million people living within a 3-4 hour radius:

Census Division	Population
Durham	561,258
York	*892,712*
Toronto	2,503,281
Peel	1,159,405
Dufferin	54,436
Simcoe	422,204
Wellington	200,425
Halton	439,256
Hamilton	504,559
Niagara	427,421
Norfolk	62,563
Haldimand	45,212
Brant	125,099
Waterloo	478,121
Perth	74,344
Oxford	102,756
Elgin	85,351
Chatham-Kent	108,589
Essex	393,402
Lambton	128,204

Middlesex	422,333
Huron	59,325
Buffalo NY area	1,393,816
Rochester NY area	1,314,899
Toledo OH area	618,203
Cleveland OH area	2,945,831
Erie PA area	639,641
Total	**16,162,683**

Source: Statistics Canada 2006, U.S. Census 2000

- There are 923 roofed accommodation rooms (hotels, motels, B&Bs) and 8,816 RV / camp sites in the region.

	Roofed Accommodation Rooms	RV / Camp Sites (Seasonal and Transient)
Elgin	317	1557
Haldimand	134	4,911*
Norfolk	472	2,348
Total	**923**	**8,816***

*Includes 1,800 sites at race tracks in Haldimand only open on race days.
*Source: PRTDF Process, 2006

- While core attractors offer collective appeal there are other destinations that offer similar products and experiences.

Competitive Destination	Experience	Distance to Simcoe
Grand Bend	Beach Town	180 km
Wasaga Beach	Beach Town	260 km
Sauble Beach	Beach Town	254 km
Niagara	Rural and Agri-tourism	133 km
Prince Edward County	Rural and agri-tourism, outdoor recreation	300+ km

St. Jacobs (Waterloo)	Rural, Agri-tourism	79 km
Elora/Fergus (Wellington)	Rural, Angling	94 km
Point Pelee	Rural, Agri-Tourism, Birding	200 km
Saugeen River, Georgian Bay, Lake St. Clair, Kawartha Lakes	>Angling	100 km – 450 km
St. Lawrence River Thousands Islands, Tobermory	>Diving	450+ km
Kingston, Orillia, Erie, PA, Alexandria Bay, NY, Cobourg, Peterborough	>Boating	450+ km

- The types of activities that Norfolk, Elgin, Haldimand have to offer have significant appeal to tourists as indicated in the most recent Travel Attitudes and Motivations Study*:

Activities During Overnight Trips in 2004-2005	**% of Canadians ***	**% of US ***
All Water Based Activities (Outdoor)	33%	25%
Exhibits, Architecture, Historical Sites	17%	18%
Sunbathing or sitting on a beach	17%	12%
Festivals and Events	16%	15%
Shopping, Dining, and Food	16%	14%
Visiting National, Provincial Parks	11%	10%
Public Campground in a Nature Park	11%	7%
Fishing - fresh water	10%	6%
Swimming in a Lake	9%	4%
Private Campground	6%	4%
Hiking- same day on overnight trip	5%	4%
Farmer's Markets and Country Fairs	4%	4%
Motor boating	4%	2%
Kayaking or canoeing – freshwater	4%	2%

Golfing - played an occasional game	3%	2%
Ice fishing	3%	1%
Cycling - same day excursion	3%	1%
Bird Watching	2%	1%
Entertainment Farms	1%	2%
Sailing	1%	1%
Cycling - mountain biking	1%	1%
Hunting small game	1%	1%

* % of travellers for whom this activity motivated some of their trips
*Source: 2006 Travel Attitudes and Motivations Study

- The region offers 326 slips for transient boaters located at various marinas, city and private owned docks along the Lake Erie coast

Transient Boat Slips	Elgin	Haldimand	Norfolk	Total
	100	**32**	**74**	**206**

*Source: PRTDF Process, 2006

PERFORMANCE – VISITATION

This section assesses Haldimand, Norfolk and Elgin's market performance in terms of visitation numbers and market share, attractiveness to different market segments, and times of year.

NOTE: The data listed below is from the 2004 CTS/ITS Survey and includes numbers for Census Division 28: Haldimand-Norfolk Regional Municipalities[1] and Census Division 34: Elgin County.

In 2004 Haldimand, Norfolk and Elgin attracted a total of 1,983,560 guests. Of these 564,495 (28%) stayed overnight and 1,419,066 (72%) were day visits.

Between 1998 and 2004, person visits increased by 2%, from 1,950,707 to 1,983,560, visits by Canadians increased by 2%, from 1,830,216 to 1,882,649 while visits by US residents decreased by 22%, from 106,064 to 82,825. Person visits by residents of other countries increased by 25% from 14,426 to 18,087.

Of the 564,495 overnight visitors, 319,063 (57%) were on pleasure trips, 212,318 (38%) were traveling to visit friends and relatives, 9,132 (2%) were on a business trip and 4% were travelling for unknown reasons.

Haldimand, Norfolk and Elgin attracted 476,731 (84%) of its overnight visitation from the Ontario market.

Overnight visitors spent 1,716,270 person nights in Haldimand, Norfolk and Elgin, with 117,993 (7%) spent in roofed commercial lodgings such as hotels, motels, resorts, B&Bs and commercial cottages, 386,592 (23%) in local campgrounds or trailer facilities and 1,065,663 (62%) in private homes or private cottages.
Source: Statistics Canada - CTS/ITS 2004

The average per person per night spending for overnight visitors to the 3 counties ranged from $26 in Haldimand-Norfolk to $38 in Elgin compared to an $84 average for Ontario. Overnight guest spend on average $94.04 in Haldimand-Norfolk and $86.05 in Elgin compared to $270.27 average for Ontario.

[1] Although Haldimand-Norfolk ceased to be a municipality in 2001, the Canadian Travel Survey continued to lump the data for the two Counties into one region.

The average expenditure for guests on day trips was $18.20 in Haldimand-Norfolk and $21.41 in Elgin compared to $62.56 average for Ontario.

In 2004, total spending was $78,652,489. Guests on day trips spent $27,328,211. 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 0.6%. Guests on overnight trips spent $51,324,278, 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 0.4%.

The $78,652,489 in spending in Haldimand, Norfolk and Elgin generated $48,525,000 in direct, indirect and induced contributions to gross domestic product (GDP), $23,403,000 of labour income and salaries and, 873 part-time, full-time and seasonal jobs. Total taxes generated as a result of visitor spending in Haldimand, Norfolk and Elgin reached $31,262,000 including $1,362,000 in municipal taxes that accrue to the 3 counties.

Visitation/Spending 2004	**Ontario**			**Haldimand, Norfolk, Elgin**		
	Total	**Same Day**	**Overnight**	**Total**	**Same Day**	**Overnight**
Total Person Visits (All Flows)	118,284,236	71,612,018	46,672,218	1,983,560	1,419,066	564,495
Origin						
Canada (Total)	94,843,493	57,347,560	37,495,933	1,882,649	1,389,737	492,912
USA (total)	21,391,369	13,957,359	7,434,010	82,825	23,371	59,454
Overseas (Total)	2,049,374	307,099	1,742,275	18,087	5,958	12,129
Visitor Spending						
Total Visits	$17,080,681,498	$4,474,312,938	$12,606,368,560	$78,652,489	$27,328,211	$51,324,278
Visitor Spending by Canadians	$10,356,111,584	$3,273,125,717	$7,082,985,867	$59,858,686	$24,470,674	$35,388,011
Visitor Spending by Americans	$4,383,216,921	$1,058,425,868	$3,324,791,053	$12,793,849	$2,563,063	$10,230,786
Visitor Spending by Overseas Visitors	$2,341,352,992	$142,761,353	$2,198,591,639	$5,999,955	$294,474	$5,705,481

Source: Statistics Canada - CTS/ITS 2004

FUTURITY – THE DESTINATIONS ABILITY TO SUSTAIN TOURISM GROWTH

- There is a market demand for the destinations offering as demonstrated in the March 2006 Travel Attitude and Motivation study:

ACTIVITIES DURING OVERNIGHT TRIPS IN 2004-2005	% of Canadians *	% of US *
All Water Based Activities (Outdoor)	33%	25%
Exhibits, Architecture, Historical Sites	17%	18%
All Performing Arts	17%	15%
Sunbathing or sitting on a beach	17%	12%
Festivals and Events	16%	15%
Shopping, Dining, and Food	16%	14%
Visiting National, Provincial Parks	11%	10%
Public Campground in a Nature Park	11%	7%
Fishing - fresh water	10%	6%
Live Theatre	5%	4%
Museums, General History or heritage	4%	4%
Motor boating	4%	2%
Kayaking or canoeing – freshwater	4%	2%
Golfing - played an occasional game	3%	2%
Cycling - same day excursion	3%	1%
Sailing	1%	1%

* % of travellers for whom this activity motivated some of their trips
*TAMS 2006, Travel Attitude and Motivation Study, Ontario Ministry of Tourism

- In the past five years, across the three Counties, a reported* $31.5 million has been invested by the private sector in facility renewal and/or expansion and development with an emphasis on products that are directly or indirectly associated with tourism. The majority of this investment has occurred in the last two years.

Private-Sector Product Renewal $	Elgin	Haldimand	Norfolk	Total
($millions)	$11.2	$9.5	$10.8	$31.5

*Source: PRTDF Operator Surveys, 2006

- Within the destination there are several Destination Marketing Organizations (DMOs) that are involved in visitor services, implementing forms of tourism marketing on a regional, provincial scale. The previously identified DMO's have total budgets of $678,000*; in most cases these dollars are allocated to communications.

Marketing Budgets	Elgin	Haldimand	Norfolk	Total
($thousands)	$90	$320	$268	$678

*Source: PRTDF Process, 2006

- It has been determined that individually each of the three destinations do not have sufficient funding to effectively target potential markets and market their respected destinations.

- The PRTDF process in each destination identified the need for increased funding for both marketing and destination development. Each of these destinations is currently exploring the possibility of implementing a DMF or DDMF (Destination Development / Marketing Fee).

THREE COUNTY DESTINATION DEVELOPMENT APPROACH

The underlying theme for a collective approach to destination development and marketing is based on the principal *"Better Together".* Elgin, Haldimand and Norfolk have already recognized the benefit of working together for the collective good of the region. Currently they participate collectively in joint marketing programmes. They have also taken this thinking a step further and branded the area as "Ontario's South Coast". From a marketing perspective this makes good sense especially given the limited resources each of the three areas have for marketing.

The Ontario Ministry of Tourism has also identified the value of working together. A good example is the Ministry's recent approach to assist in developing the Niagara Region. As a result of Niagara Region's PRTDF process, the DMOs and industry there are working on a number of "region-wide" product/experience development initiatives. Together they recognize Niagara Falls as a key demand generator, but they also understand that the collective experiences available in the entire Niagara Region present a very compelling tourism offering. For this reason the Ministry is encouraging a collective approach.

For similar reasons Elgin, Haldimand and Norfolk wish to initiate a strategy that will capitalize on the appeal of three individual destinations within the area as well as foster the creation of new collective tourism experiences that can be developed on a region-wide basis.

The lead DMO organizations in the area have identified three fundamental objectives:

1. Increase the total number of visitors who come to the Elgin, Haldimand and Norfolk area by 2% by 2011 (40,000 visitors)
2. Increase the total tourism receipts generated from visitors to the area by 3% by 2011 ($2.3 million)
3. Using the information found in this report develop two <u>new</u> product/experience initiatives that will be "market ready" and can go to market by January 2009

In order to meet these specific objectives several key strategies must be implemented. The individual PRTDF projects have helped identify those strategies. They have been developed based on the extensive amount of work, including the comprehensive tourism product audit that has taken place, in each of the three destinations. The three destinations have a number of common core attractors or demand generators, reasons people are currently traveling to the destination.
In order to establish the primary opportunities for collective development it is important to understand what assets the destinations hold in common. These include:

Common Core & Supporting Attractors

- Outdoor recreation
  - Canoeing, kayaking, sport fishing, ice fishing, hunting, hiking, cycling, birding
  - 8,816 RV/Camp sites
  - 4 Provincial Parks
- Small towns, villages, rural landscapes
  - Community based themed celebrations
  - Small town personality and character
  - Culture, heritage, agriculture
- Water based experiences, Lake Erie coast
  - Swimming, sun bathing, wind surfing, water skiing, diving, skim sports, sailing, and power boating
  - Long Point World Biosphere
  - The towns and communities of: Port Stanley, Port Burwell, Port Bruce, and Port Glasgow, Port Dover, Turkey Point, Port Rowan, Long Point, Port Maitland
  - Marinas, unique and interesting retail and a variety of food and beverage outlets
- Heritage
  - National Historic Sites
  - Provincial Heritage Sites
  - Local Heritage Sites
- Agri-tourism
  - Community based agricultural fairs and festivals
  - A significant number of “U-Pick” farms
  - Increased awareness of the potential impact of culinary tourism and local food sources

With this understanding there is a need to determine the areas where collective product and experience development opportunities exist.

OBSERVATIONS

Based on a thorough review of the PRTD findings we have made the following observations:

- Positioning – *Ontario's South Coast* is a good way to "position" and "brand" the collective
    - It is distinctive and has potential to establish a unique place in the mind of the target
    - It reinforces the destinations major attractor – water, the coast, Lake Erie
    - The current logo has positive visual appeal, is warm and inviting
    - Geographic boundaries of *Ontario's South Coast* needs to be defined and focused

- Getting people off Highways 401/403 is critical
    - Creating "Reasons to STOP" are essential to make this happen
    - Establishing awareness of reasons to stop before departure is important
    - Signage plays an important role
    - Visitor Centres play a role

- There is a definite lack of accommodation options in all three counties
    - This is cause for concern if tourism in terms of visitation and expenditures to the area is to grow
    - Current occupancy levels are low in shoulder season and overnight stays need to be encouraged during that period

- Agri-tourism is an underdeveloped asset in each county
    - Each county offers unique agri-tourism experiences
    - There appears to be areas of opportunity in terms of product/experience development
    - What can we learn from Prince Edward County and other culinary tourism regions
    - It has potential to become an "anchor attractor" for the area, like the Lake Erie coast

- The areas wealth of camp and RV sites, if better leveraged, presents an opportunity to grow visitation and overnight accommodation options
    - 8,816 sites are currently available
    - A significant percentage of these sites are “seasonal”

- The region attracts primarily the “rubber-tire” market (private autos, motorcycles, RVs, cyclists); there needs to be an assessment of the target segments so that the destination can best position itself for opportunity and better leverage visitation to the area from this market
    - The areas highways and rural roads are ideal for touring experiences
    - A review of touring signage may be warranted
    - An opportunity to enhance or create more observation/rest areas exists

RECOMMENDATION AND STRATEGIES

1. **Norfolk, Elgin and Haldimand must agree to and adopt a long-term and flexible working relationship in order to achieve individual and collective goals of the region’s tourism industry.**

2. **Focus attention on developing the unique agri-*tourism and culinary tourism* experiences that are available in the area over the next 18 months and develop a series of new or enhanced agri-tourism and culinary tourism experiences.**

    – Work with existing partners to:
        - Create an inventory of current agri-tourism and culinary tourism experiences
        - Identify collective development opportunities related to experience enhancement
        - Explore and/or revisit interpretive experiences especially around Ginseng and peanut farming, commercial fishing operations, wineries, etc.
        - Capitalize on farm transition activity and seek guidance from individuals involved in this effort

    – Capitalize on and extend existing “locally grown” food promotion initiatives already in place

    – Partner with OMAFRA and others, and involve them in the development strategies

- Seek third party assistance from a product development specialist to facilitate this process as necessary
- Identify a development budget, seek partners willing to participate in this initiative through investment
- Examine best practices of other areas and learn from these examples, put them in place where appropriate
- Maximize the efforts by connecting an agri-tourism or culinary tourism experience to an overnight stay, especially in the shoulder season or in off-peak days of the high season

Support to the Recommendation

Harvest Ontario provides the following information about agri-tourism:

A typical agri-tourist is:

- Moderate to high-income urban families and mature/senior couples
- 65% female, 35% male with an average of 2 children
- Principle food buyer for their household
- Enjoy spending quality time with family/partner
- High interest in outdoor/nature-oriented/learning activities
- Enjoy exploratory day-trip style experiences with a country theme
- 38% of consumers visit an on-farm market 2-6 times per year
- 37% of consumers who visit a farm are between the ages of 35-49

Agri-tourism finds its roots in the Italian term agritourismo – the concept of bringing urban residents to farming areas for recreation and spending. Savvy farm businesses today sell the country experience with something for all ages from mazes, petting zoos and playgrounds to winery tours, bake shops and B&Bs on working farms. Combing the strengths of Ontario's superior produce with domestic tourism, the agri-tourism experience is driving people out of the city in record numbers.

The Harvest Ontario web site lists the following Elgin, Haldimand and Norfolk County businesses:

Norfolk County Farms

Cedar Lane Blueberry Farm - Simcoe
Cider Keg - Vittoria
Depner's Blueberries - Simcoe
T & S Gignac Farms Ltd. – Langton Kent
Kreek Berries – Simcoe

Lakeview Blues - Simcoe
Matz's Fruit Barn - Port Dover
McNeice's Fruit Farm & Ghs. - Hagersville
Meadow Lynn Farms - Simcoe
Powell's Patch Blueberries - Simcoe
Wagon Wheel Produce - Simcoe
Dalton White Farms - Delhi
Peacock's Berry Patch - Simcoe

Elgin Area Farms
Berry Hill Farm Market - Aylmer
Empire Valley Farm Market - Wallacetown
Bittersweet Farm - Straffordville
Bluegroves Blueberries - West Lorne
Clovermead Apiaries - Aylmer
Ferguson Produce - St. Thomas
Great Lakes Farms - Port Stanley
Heritage Line Herbs, Richmond
Pfeffer Rhea Farms, Sparta
Mark Wales Farm Fresh Produce - Aylmer
Rokeby Orchards - Aylmer
Salt Creek Farm - St. Thomas
Summ'r Sweet Berry Farm - Aylmer

Haldimand Area Farms
Blueberry Knoll Berry Farm - Haldimand
Blyleven Farms - Lowbanks
Pick-A-Berry Farms - Dunnville
Richardson Corn Maze & Farm Market - Dunnville

There are also listings of Farmers Markets, Country B&B's, Fairs, Christmas Trees and other producers where several other Elgin, Haldimand and Norfolk County businesses are identified. Norfolk County operates an extensive agriculture website at www.norfolkfarms.com.

3. **Grow the accommodation options – continue to encourage development of new roofed accommodations and capitalize on the Camping and RV accommodation options available in the area by encouraging enhancement to existing product and encouraging the development of new operations.**

   – Consider the creation of a "region wide" incentive programme to attract more new roofed accommodation development
     - This is already a practice in Norfolk County

- Conduct a comprehensive audit of the current inventory of RV/ Camp sites and operations in the three county area
    - Validate the number of operators
    - Identify the mix of seasonal and transient sites
    - Identify a profile of the operations located in the area
    - Identify the marketing vehicles currently used by operators
    - Identify site rental price structures available
- Maximize the number of existing sites for "visitor" campers
- Consider establishing RV/Camp site standards, a self policing process to reinforce standards of service
    - Communicate to current owner operators this checklist provided by the RVDA:

The Recreational Vehicle Dealers Association members from across Canada offered the following suggestions when asked for tips that may help attract RV business to your operation:

- Ensure your entranceway or parking area has appropriate turn-around or drive-through space.
- Signage should be high and clear of shrubbery.
- Make an effort to communicate to RVers to let them know they are welcome, through your promotional material.
- Keep a list of locations for the nearest RV dealer, or RV service station. (There are lots of auto service stations but RV service locations are much harder to find.)
- Larger parking stalls for the increased size of the vehicles. (Bus parking should be left for buses.)
- Road signage is always an issue. RVs are on the road for their holiday, not simply to go from one point to another.
- Give them a reason to get off the highway.
- Keep frontline employees up-to-date on what your town or city may have to offer.
- For RVs the shortest directions may not always be the best, take into account traffic, narrow streets and downtown difficulties when giving directions.

- If your attraction is RV friendly, advertise it! It can be as simple as "RV parking available" - but it is always nice to feel welcome.

– Work with the Counties to identify possible new sites in each County for potential new development
    - Concentrate on locations near core attractors
    - Consider putting incentives in place to encourage new development from the private sector
    - Consider the role of the municipalities in each county and / or Conservation Authorities might have in developing new sites, these organizations are currently “in the business”

– Strengthen partnership with Provincial Parks in order to encourage enhancements to existing sites and development of new sites

– Explore options for joint customer service training and other seminars or workshops for businesses
    - Match the outdoor experiences that are offered in Elgin, Haldimand and Norfolk Counties with the overnight accommodations available through the large number of RV/Camp sites that are available
    - Establish overnight outdoor accommodation packages that incorporate a variety of outdoor experiences packaged with accommodations at a RV/Camp site
    - Consider creating region-wide marketing tactics that works in partnership with the Ontario South Coast brand
    - Consider creating a *micro* web site and visitor publication that leverages the power of these new packages and experiences

Support to the Recommendation

2004 visitor data as well as other secondary research pertaining to RV/Camping supports the recommendation and potential growth opportunities for the Elgin, Haldimand and Norfolk Counties:

In 2004 overnight visitors to Elgin, Haldimand, Norfolk Counties spent 1,716,270 person nights in Haldimand, Norfolk and Elgin, with 117,993 (7%) spent in roofed commercial lodgings such as hotels, motels, resorts, B&Bs and commercial cottages, 386,592 (23%) in local campgrounds or trailer facilities.

Individuals traveling to experience the "outdoors", a product the three counties have in common, are more likely to stay overnight at an RV/Campground than in a hotel/motel

- Ontario outdoor visitors spent 29% of person nights at private cottages
- Ontario outdoor visitors spent 24% of person nights in homes of friends or relatives
- Ontario outdoor visitors spent 17% of person nights in camping and trailer parks
- Ontario outdoor visitors spent 7% of person nights in hotels
- Ontario visitors in general spent 17% of person nights in hotels
- Elgin, Haldimand and Norfolk Counties have the activities Ontario outdoor visitors participate in
  - 32% went boating
  - 27% went fishing

2004 Statistics Canada - CTS/ITS

The 2005 Travel Activities & Motivation Study reveals the type of shelter Canadian campers' use:

- Tent, 5,188,376 (63%)
- Travel Trailer/Fifth Wheel 1,239,722 (15%)
- Motor Home or RV, 703,970 (9%)
- Tent Trailer 645,715 (8%)
- Truck Camper or Van 413,163 (5%)

Activities during overnight trips in 2004-2005	Canadian travellers	% of total travellers	% of Travellers for whom this activity motivated some of their trips
A public campground in a nature park	5,206,549	25%	11%
A private campground	3,744,979	18%	6%
A camp site in a wilderness setting (not a campground)	1,698,239	8%	4%
A motor home or RV while traveling or touring (not a camping trip	926,331	4%	1%

2005 TAMS Report

The Go Rving Canada Coalition reports:

- 14% of Canadian households own an RV

- There are over 800,000 RVs on the road in Canada
- 40% of RV families have children
- Studies show there is up to a 70% saving during an RV vacation vs. a traditional vacation
- Price range of an overnight full-service campground stay - $25 - $45
- 90% of owners say it is the best way to travel with kids
- 90% of RVers say seeing the country is their top priority
- RV owners are more likely to spend time enjoying Canadian tourism than traveling abroad
- RV owners were twice as likely to spend vacation time in Canada as non RV owners
- 14 per cent of Canadians vacationed outside Canada and the United States while only 7 percent of RV owners made trips abroad
- RV owners are 16 percent more likely to vacation in their home province and 8 percent more likely to tour other Canadian destinations than non RV owners
- After summer of 2007 there was a trend towards shorter, more frequent trips closer to home among RV families
- RV owners took significantly more vacation in 2006 than average Canadians, a total of 6.9 trips for RVers versus 4.1 for non RVers.
- In June 2007, Statistics Canada released economic analysis that RV sales were up 29.7 per cent year to date in Canada
- Randy Williams, President and CEO of the Tourism Industry Association of Canada said RV owners are enjoying more vacation time in Canada than other Canadians and that this is a market segment that should continue to boost local tourism spending
- From April to June 2007, nationwide RV sales totalled nearly $1.32 billion, while in 2006, sales for that period were close to $1.18 billion, (Statistics Canada sales figures which reports on RV sales monthly)
- RV owners ranked the freedom to travel, convenience away from home, and experiencing nature with the comforts of home as the most important image factors related to the RV lifestyle

Data from the U.S. Recreational Vehicle Industry Association, Dec. 2005

- Nearly 8 million U.S. households own at least one RV—a 15 percent increase over the past four years and a stunning 58 percent rise since 1980
- One in 12 U.S. vehicle-owning households now own at least one RV

- A leading force behind RV ownership's upswing is the enormous baby boomer generation, supported by strong ownership gains among both younger and older buyers. In fact, high RV ownership rates now extend across a 40-year span from age 35 to 75, the study found.
- Those under age 35 posted the largest gains in RV ownership rates over the past four years—testimony to industry promotion efforts bringing in more young families, the study suggests.
- More RVs are owned by 35-to-54 year olds than any other age group.
- The typical RV owner is age 49, married, owns a home and has an annual household income of $68,000.
- Demand for RVs will continue to grow during the next decade, due to favourable population trends and purchase intentions, the study found.
- Baby boomers have begun entering the prime age range—55 to 64—with the highest ownership rates, according to the study. Today one-in-10 vehicle-owning households in that age group own at least one RV.

4. **With input from existing advisory bodies and stakeholders, collectively analyze the opportunities in focusing specific attention to the rubber tire tourism market and specifically identify and determine what is required from a product enhancement perspective to attract more of this market to the three county areas.**

   – Fully understand the potential for increasing visitation from these segments of the rubber tire market:

     - Cars
     - Motorcycles
     - RVs
     - Cyclists
     - Motorcoach

   – Determine target seasons when occupancy is low in specific areas

   – Explore the specific demands of each of these segments, explore best practices or competitors in these markets currently, and identify private-sector partners in the region who are already capitalizing on these “rubber-tire” segments (or who wish to)

– Position the three county area as a ideal location for sightseeing motorists, RV campers, motorcycle enthusiasts, and cyclists

– Identify the experience enhancements needed to service this market: signage, rest areas etc.

Support to the Recommendation

Motorcycling While on Trips – 2006 TAMS, CDN Market

- Over the last two years, only 2.2% (552,204) of adult Canadians went motorcycling while on an out-of-town, overnight trip of one or more nights. Motorcycling was the 19th most common outdoor activity pursued by Canadian Pleasure Travelers during this time. 1.9% went motorcycling as a same day excursion and 1.2% went motorcycling as an overnight touring trip. The majority of Motorcyclists (56.2%) report that this activity was the main reason for taking at least one trip in the past two years.

- Motorcyclists were the 5th most likely to have taken a trip within their own province or region (94.6%) of the 21 outdoor activity types. However, they were only the 13th most likely to have visited an adjacent province or region (56.6%) or a non-adjacent province or region (36.5%). In terms of out-of-country travel, Motorcyclists were the 5th most likely to have taken a trip to the Caribbean (24.4%), the 8th most likely to have visited Mexico (18.6%) and the 10th most likely to have visited the United States (58.0%)

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- Motorcyclists were quite active in both outdoor activities and in culture and entertainment activities when they travel. They were especially active in motorized activities (e.g., boating & swimming, snowmobiling & ATVing) as well as hunting, horseback riding and cycling. Motorcyclists also exhibit above-average interest in equestrian and western events, amateur sporting tournaments, comedy festivals ands clubs and aboriginal cultural experiences. They were more likely than others to have taken self-guided tours, sightseeing cruises and Caribbean cruises. Motorcyclists most often go camping on trips, both in public campgrounds and in wilderness settings. They seek vacations that offer opportunities to relax and unwind (e.g., get a break from their daily environment, no fixed schedule) and are physically energizing.

Other Support

The Friday the 13th motorcycle enthusiast event is very popular. Although there is no intention to grow this specific event any larger, there have been observations in all three Counties of increased motorcycle traffic in all warm months of the year. There are numerous motorcycle clubs (not affiliated with organized crime) that already visit the area and wish for more information catering specifically to their needs. In many cases, this segment is populated by affluent, mature couples and professionals.

Car enthusiasts also present a unique opportunity for the area, similar to motorcycle enthusiasts. There are Corvette clubs, Jeep clubs, Hummer happenings, VW clubs, as well as more than 40 Saturn car clubs across North America.

IMPLEMENTATION – WHO DOES IT?

While the opportunities for collective tourism development are significant they will not happen unless there is proactive plan is in place. The framework for product and experience development in the area as presented in this report requires a dedicated focus over the next 3 years if the identified objectives are to be met. While tourism operators and the DMOs in the region have demonstrated a willingness to place human and financial resources against collective marketing opportunities there will, without doubt, be a significant gap in identifying resources for product and experience development.

Recommendation

1. Establish a tourism team of existing DMO staff from Norfolk, Haldimand and Elgin to focus on implementation
    - DMO staff to meet four times per year to monitor progress in fulfilling the recommendations
    - Engage existing advisory groups and private-sector partners from each County
    - Define priorities on a collective basis and assist one another on individual challenges
    - Raise awareness of the opportunity tourism represents as a revenue generator for the regional economy, which is under stress due to challenges in the agriculture sector in the development community

2. It is recommended that the senior officials of the lead DMOs continue discussions with the provincial and federal government in order to identify the financial resources needed to facilitate the implementation of these recommendations, then collectively undertake to secure the financial resources from a variety of sources
   - It is understood that the funding formula be based on a partnership philosophy and that many partners participate in meeting the funding requirement
   - It will be necessary to identify funding sources for, at minimum, a 3 year time frame if the identified goals are to be met

3. Once the funding is in place it is recommended that the representatives of the three DMOs continue to manage the implementation of the recommendations utilizing for the most part industry members supported by outside 3rd party resources as needed
   - Prioritize the tactics as presented in this document and develop a tactical plan and timeline in order to meet the identified objectives
   - Empower industry led groups that have a vested interest in the development of these initiatives to take an active role in implementation
   - Engage elected officials and sector representatives in the process

NEXT STEPS

ACTION	DATE 2008
Each County to agree to proceed with these recommendations, once agreement is reached each County	April 2008
Prioritize needs, establish short-term and medium-term action plan, determine collective resources available	Ongoing
Meet with provincial and federal government representatives and others to discuss funding strategies, and secure necessary funding	Ongoing
Prioritize actions for long term, begin implementation	Ongoing

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