



YORK REGION PREMIER-RANKED TOURIST DESTINATION PROJECT

THE PROCESS, KEY FINDINGS & RECOMMENDATIONS



*Markham · Vaughan · Richmond Hill · Newmarket · Aurora
Georgina · Whitchurch-Stouffville · East Gwillimbury · King*

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BACKGROUND

Regional Council for York Region approved the Premier Ranked Tourism Destination project in 2004 and with the financial support of the Government of Canada (Service Canada) and the Ontario Ministry of Tourism; the project commenced in October 2005 and was completed in September 2006. A Premier Ranked Team of five individuals were hired to facilitate the comprehensive audit and implement the analysis process. The consulting company of Brain Trust Marketing & Communications was retained to provide direction throughout the project and to craft the final report and summary upon project completion. A Premier Ranked Steering Committee was struck to assist the facilitation of the project with the York Region Tourism Advisory Group.

This report provides an overview of the Premier Ranked Tourist Destination framework, the process and presents the key findings and recommendations that have been vetted through industry consultations and approved by the Premier Ranked Steering Committee and the York Region Tourism Advisory Group.

“A Premier Ranked Tourist Destination is defined as:

“A place more attractive than the rest, a place the tourist should consider first when making travel plans.”



INTRODUCTION

What is the Premier Ranked Tourist Destination Framework Process?

The Premier Ranked Tourist Destination Framework (PRTDF) was developed by the Ontario Ministry of Tourism to provide a framework for tourism destinations across Ontario to define their competitive position within the tourism marketplace on domestic and international levels.

The Ministry of Tourism developed a resource audit and workbook format that outlines the attributes, factors and the conditions that are considered prerequisites for a tourist destination to be considered a destination serious in building its economic well being in order to grow tourism revenues for the destination and its tourism shareholders. The workbook format provides a simple methodology that communities can follow to ensure consistency, accuracy, and maximum involvement of the key tourism and economic development stakeholders in the process. 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 being or moving to being Premier Ranked is not an official designation or grading. It is simply a process designed to help destinations improve in their viability and competitiveness as a place visitors want to visit.

There are three specific dimensions of tourism assessment included in the study:

1) The Product Dimension

A Tourist Destination provides a high quality tourist experience, enabled through the destination’s offerings of:

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

2) The Performance Dimension

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

- ◆ Visitation
- ◆ Occupancy and Yield
- ◆ Critical Acclaim

3) The Futurity Dimension

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

- ◆ Destination Marketing
- ◆ Product Renewal
- ◆ Managing within Carrying Capacities



The process involves several critical steps along with a serious commitment and investment of time by industry partners. This investment of time and energy is rewarded with specific insights and direction. At its conclusion, the Premier Ranked Tourist Destination research project provides:

- ◆ A database of critical baseline tourism business data
- ◆ An understanding of York Region's destination status in the global tourism marketplace and the opportunities and challenges constraining that status
- ◆ A solid base for preparing a long-term regional tourism strategy
- ◆ Product development and partnership opportunities
- ◆ Recommendations that support the growth and sustainability of the tourism sector
- ◆ A foundation to attract tourism investment and create employment opportunities.

The additional benefit of this methodology is the expanded and more capable network of industry stakeholders involved. By working through this process stakeholders will have a more cohesive focus on solving current and future challenges.

Why York Region?

As one of the countries fastest growing areas, York Region is at the forefront of sustainable growth and improving quality of life for its 920,910 residents now and well into the future. *Vision 2026 Towards a Sustainable Region* positions York Region well to manage the rapid growth the Region is experiencing. Vision 2026 is built on a vision of *Creating Strong, Caring and Safe Communities* by concentrating on developing a sustainable Region. The Vision 2026 strategy is built on a vision focused on its residents; "York Region residents will live, work, play and learn in healthy, safe and accessible neighbourhoods that are vibrant, exciting and people friendly. Residents will continue to enjoy the high quality of life that attracted them to York Region and will have a strong sense of belonging and commitment to their communities."

Vision 2026 - Towards a Sustainable Region, Fourth Annual Report, Spring 2006

Against this backdrop York Region identified tourism as an area of opportunity. It recognized that among the characteristics of its diverse region was an interesting and attractive product mix that not only appealed to local residents but had the potential to attract visitors from far and wide. From its historical roots, its natural beauty, its charming streetscapes, its multi-cultural personality and its varied and diverse attractions, dining and sightseeing options York Region has the ingredients to become a desirable visitor destination.



Starting from a Position of Strength

The tourism program has been a core component of York Region's economic development efforts since January 2000, when the responsibility of tourism promotion, marketing, partnerships and industry development was integrated within the York Region Economic Development division.

The York Region tourism program identifies research as a key initiative to support the growth and the sustainability of the Region's tourism industry and the undertaking of the Premier Ranked Tourist Destination project will assist this identified strategy.

The Premier Ranked Tourist Destination process is not an official designation or grading but a framework designed to assist destinations in improving their viability and competitiveness as a place consumers want to visit. The process provides recommendations, that if implemented; enable a tourist destination to operate at the highest possible level it can achieve. The external consultant who assisted the tourism industry with analysis of the data, has undertaken this initiative in Niagara Region, Prince Edward County and Mississauga and is aware of findings from another six destinations. He advised that none of those destinations were considered "Premier Ranked" and that York Region fared better in comparison.

The Premier Ranked Tourist Destination report is designed to identify the areas where improvements are required, however the study identified that York Region is starting from a position of strength.

The key York Region advantages include:

- Tourism visitation is growing. In 2004, York Region attracted a record number of 3 million visitors, a 16% increase over the previous year. Overnight trips increased by 21% and visitation from all regions grew substantially; Canada +17%, U.S. +30%, International +34%
- Tourism revenues are growing. In 2004 tourism generated a record \$209.3 million in spending, a 13% over the previous year.
- York Region Tourism is recognized as the lead Destination Marketing Organization by the tourism industry within the Region and the Province.
- York Region Tourism has established solid working relationships with key tourism organizations including the Ontario Tourism Marketing Partnership Corporation, the Ontario Ministry of Tourism and Recreation and the Canadian Tourism Commission.
- York Region Tourism has successfully partnered with government organizations to source funding including a multiple year funding partnership with Tourism Toronto.



- York Region has seen significant investment in tourism facility renewal, expansion and development and businesses continue to upgrade tourism products
- York Region offers visitors signature attractions, including McMichael Canadian Art Collection, and some of York Region's individual tourism operations have critical acclaim, Canada's Wonderland, Angus Glen Golf Club
- York Region offers visitors a range of experiences encompassing a variety of activities, price points and layers of added value
- York Region offers visitors a variety of accommodation options and price points with close proximity to the core and supporting attractors
- Compared to other destinations, York Region scores high with the variety and quality of dining and retail shopping experiences
- York Region is well prepared to manage the employment concerns
- York Region is well prepared to manage water treatment and delivery capacity, road, transit, parking and trail capacity plus the environmental effects of infrastructure expansions
- York Region is well positioned to handle a growth in tourism visitation

Tourism is big business in countless communities around the globe and York Region is well positioned to reap its share of this economic wealth. Tourism not only contributes to the many businesses in York Region but also positively impacts residents by improving their quality of life.

Project Process

September 2005

- Funding assistance from Service Canada and the Ontario Ministry of Tourism approved.
- A Premier Ranked Steering Committee comprised of key representatives for the York Region Tourism Industry was struck to assist the York Region Tourism Advisory Group in the facilitation and review process of the project.
- A third party facilitator, Richard Innes, from Brain Trust Marketing & Communications was retained to assist with the project implementation

October 2005

- A team of five individuals were employed through Service Canada as the Premier Ranked Audit Team. Team representatives were engaged either for a 40 or 45 week duration from October 2005-August 2006. The role of this team was to conduct field research as well as, manage the comprehensive stakeholder survey process and facilitate the Premier Ranked Tourist Destination project analysis and framework process.



November 2005

- Paul Samson, Ontario Ministry of Tourism staff, provided direction to the Audit Team on the Premier Ranked process and the role the Team would play throughout the project.
- The Premier Ranked Steering Committee and the York Region Tourism Advisory Group were also briefed and endorsed commencing the project.

Completion of the Premier Ranked Tourist Destination project framework is based the Audit Team facilitating the following four step process:

Step One: Data Base Design and Collection

November 2005 – April 2006

- A database of “potential” tourism businesses was created and 1345 questionnaires were delivered to companies representing the accommodation, food and beverage, attraction, heritage and cultural, wineries, campgrounds & parks, marinas, golf, transportation, retail, events, festivals and outdoor adventure sectors. These businesses were thought to be involved with or have an interest in tourism
- 181 surveys were returned or not completed for various reasons including duplication, incorrect addresses, language barriers, businesses not interested in tourism or

no longer in operation.

- The total number of companies eligible to complete a survey was 1090
- 377 surveys were completed representing a 41% completion rate. Surveys were either completed and returned by mail, completed in person or by telephone
- The survey data was accumulated, entered, clarified, analyzed and evaluated using the PRTDF workbook and the Tourism Resource Opportunity Matrix

Step Two: Evaluation of the Product, Performance and Futurity Dimensions – May 2006

- Each of 118 measures included in the PRTDF Workbook were completed using the survey data
- Third party research was also utilized to supplement survey data

Step Three: Completing the Destination Performance Summary – May – June 2006

- The Premier Ranked Audit Team presented the initial summary of findings and preliminary recommendations to the Premier Ranked Steering Committee and the Tourism Advisory Committee for comments on June 8, 2006



- Additional work was undertaken to fill in information gaps and supplement initial findings, some gaps were not filled due to lack of information, for example customer experience / satisfaction data

Step Four: Present Summary Findings, Recommendations and Final Report – June, July, August 2006

- The 377 tourism businesses that completed the surveys were invited to presentations on June 26th, 2006 to see how the data they provided was incorporated into the Premier Ranked Tourist Destination framework to obtain the summary of findings and recommendations. Their comments and feedback were reported back to the Premier Ranked Steering Committee and the York Region Tourism Advisory Group.
- On August 1, 2006, presented to the York Region Tourism Advisory Group and the Premier Ranked Steering Committee for additional discussion and comments to formalize and approve the findings and recommendations that would be incorporated into the final report
- The Consultant prepared the York Region Premier Ranked Tourist Destination project final and recommendations report for presentation to the Planning and Economic Development Committee and Regional Council in October 2006

Evaluation Process

Evaluation is the key step to understanding the reality of York Region’s tourism offerings in very specific terms through a comprehensive Resource Audit. The audit measures objectively York Region’s Product, its Performance as a tourism destination and its Futurity in terms of how it plans to improve, enhance, and market its attractiveness as a tourism destination into the future.

Throughout this report symbols are used to indicate the performance rating of each section as determined by the survey data provided by the participants in the process.	
The symbols are as follows:	
●	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



PRODUCT

Evaluation Rating ○

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 York Region's product attributes:

Distinctive Core and Supporting Attractors

This section assesses what it is about a destination that makes it stand out and distinctive, how the attractors are distinguished and how they are relevant to market wants. The evaluation process has identified York Region's core and supporting attractors, their distinctiveness, and the nature and size of the visitor markets to which they are to be considered to be attractive.

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

York Region's Core Attractors: (not listed in any priority)

- ◆ Natural Outdoor Attractions & Recreation Opportunities
- ◆ Urban / Rural Experiences & Activities
- ◆ Cultural / Heritage Attractions & Events
- ◆ Canada's Wonderland

Natural Outdoor Attractions & Recreation Opportunities

With hundreds of outdoor recreation options available, York Region is positioned to offer visitors a wide variety of natural outdoor experiences and recreational activities located in close proximity to lodging and other visitor services. These are a result of York Region's diverse and varied topography and natural beauty. With more than 27 conservation areas, the Oak Ridges Moraine, 44 beaches, 60 golf courses, 29 birding and wildlife viewing locations, 19 ice fishing operations, 2070 hectares of Regional forests and miles of hiking, biking, cross country skiing and snow shoeing trails, York Region presents natural outdoor product and recreation opportunities that will meet the desire of visitor expectation 365 days a year.

Urban/Rural Experiences & Activities

Varied in nature York Region's urban and rural products are diverse and unique and offer a breadth and depth of experience to keep discerning visitors occupied for many hours. York Region presents a blend of engaging sightseeing and touring



opportunities along with a multi-cultural texture experienced through year round events, dining and retail opportunities which add depth and dimension to the experience. At the foundation are community events and agricultural fairs, quaint streetscapes with a variety of dining and retail opportunities and rural agricultural experiences that includes a growing wine industry. Visitors have easy access to this variety of urban and rural experiences 365 days a year on the Regions highways, rural roads and city streets and all activities are located within close proximity of overnight accommodations.

Cultural/Heritage Attractions & Events

With over 60 museums, galleries and interpretive centres and more than 125 performing arts festivals & events, York Region is rich in culture and heritage. From landmark heritage attractions like the Sharon Temple to the cultural significance of the McMichael Canadian Art Collection the Region presents a rich historical landscape as well as a calendar of exciting and diverse visual and performing arts events, festivals, plays, concerts, galleries and exhibits. These products are all within close proximity to an exciting variety of dining options, excellent selections of accommodations and visitor services.

Canada's Wonderland

North America's number one attended theme park in 2005, Canada's Wonderland annually attracts more than three

million seasonal visitors to York Region. Guests come primarily from Ontario, Quebec and the border U.S. States. Its evolving list of features is the primary reason the park continues to draw visitors. While many of the Park's visitors come from the Greater Toronto Area a large percentage travel many miles to experience everything the park has to offer. As a result a significant number of guests stay overnight in paid roofed accommodations within the Region. These same guests take advantage of other things to see and do in York Region including shopping at neighbouring Vaughan Mills. Many York Region accommodators market special Canada's Wonderland hotel packages throughout the summer season.

Supporting attractors are features and facilities that attract guests to a destination by giving additional reasons to travel there. Supporting attractors are generally supporting attractors to core attractors.

York Region's Supporting Attractors: (not listed in any priority)

- ◆ Meeting & Conference Venues & Facilities
- ◆ Dining & Shopping Opportunities

York Region's core and supporting attractors, when positioned together as part of a regional complex, do offer attractiveness and appeal. On their own however, they may not have the potential to motivate visitors to travel to the Region (with the



exception of Canada's Wonderland). The Regional complex is comprised of tourism experiences located in Markham, Vaughan, Richmond Hill, Newmarket, Aurora, Georgina, Whitchurch-Stouffville, East Gwillimbury, and King. York Region benefits significantly from its geographic proximity to Toronto, Canada's largest city, and capitalizes on its appeal and attracts many of its visitors to York Region. Toronto's visitors use the services available in York Region such as its hotels, meeting venues, restaurants and shopping facilities. In addition York Region's small town / big city characteristics offer an escape from the congestion associated with large cities. The core attractors have a close link to the Region's physical setting as well as its historical linkages. Being located in the *Greenbelt* area and having the Oak Ridges Moraine, the Holland Marsh and Lake Simcoe within its borders supports the Region's attractiveness when it pertains to *Natural Outdoor Attractions & Recreational Opportunities*. Yonge Street, Canada's longest street, provides historical significance to the Region because it still remains a primary artery to Ontario's north. As a result the villages located on Yonge Street offer a wide variety of cultural and historic attractiveness.

While York Region's core and supporting attractors offer *collective appeal* they do not present an exclusive or unique product offering; therefore would not be considered superior to other destinations. Many neighbouring destinations such as the

Regions of Peel, Durham and Niagara offer similar product experiences and opportunities. These destinations are all located within easy reach of York Region's target audience and therefore competition for the visitor dollar is significant.

Attractions that do stand out to some degree and help form the basis of York Region's core attractors are:

- ◆ Canada's Wonderland — Canada's largest and North America's most attended theme park
- ◆ Sharon Temple — National Historic Site and Museum
- ◆ The McMichael Canadian Art Collection — Home to Canada's Group of Seven and over 6000 Canadian works of art
- ◆ Kortright Centre for Conservation — Voted 2005 Best Conservation Area - Parent Magazine
- ◆ Angus Glen Golf Course — Site of the 2004 & 2007 Canadian Open Golf Championship
- ◆ Vaughan Mills Shopping Centre — Canada's largest shopping centre
- ◆ Pacific Mall — Canada's largest Asian shopping centre
- ◆ The Wave Pool — The GTA's only indoor wave pool

The Ministry of Tourism annually tracks visitor activity and can determine what visitors do while travelling within



Ontario. York Region's core attractors line up with some of the experiences visitors have when they come to Ontario and it can be said that York Region's attractors do have mass appeal. However, a small number of visitor's travel to participate in one of the core attractors especially when compared to provincial totals.

revenue. In 2004 U.S. visitors represented 17% of trips taken to York Region generating \$47.1 million in tourism receipts. Compare this to domestic overnight visitors representing 8 out of 10 overnight trips; they generated about 40% of receipts but only \$60.4 million of tourist expenditures. Increasing out of province visitors to York Region would have a positive economic impact to tourism businesses.

Trip Type / Market For York Region	York Trips
Participate in Outdoor Activities, Outdoor Enthusiasts	238,165
Participate in Playing Golf, Golfers	59,290
Visit a Historic Site, History Buffs	48,207
Visit a Museums and/or Galleries, Cultural Tourists	32,981
Visit a National or Provincial Park, Outdoor Enthusiasts	31,404
Attend Cultural Performances, Cultural Tourists	23, 525

Source: CTS / ITS, Statistics Canada

The market segment interested in York Region's core and supporting attractors are primarily adults traveling as couples or in groups without children who live in Ontario. In 2004 the largest group of travellers, close to 90%, were comprised of adult only parties. On average, only 10.3% of visitors to the Region travelled with children. According to the Premier Ranked Tourist Destination Framework Resource Audit a significant number of existing travellers, 62%, are considered fully independent travellers (FIT), while 32% originate from the corporate meetings and the transient market. To its advantage York Region's core and supporting attractors are available to attract visitors on a year-round basis.

Source: CTS/ITS, Statistics Canada, PRTDF Survey 2005

York Region's core and supporting attractors seem to have greater potential to attract visitors who live in Ontario than visitors from beyond Ontario's borders. But out of province visitors, particularly Americans represent a potentially significant sized market for York Region in terms of tourism



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 York Region's activity and amenities base and the quality of its entertainment, dining and shopping offerings.

York Region offers visitors many interesting and compelling experiences however, these are not sufficient to sustain interest for more than 24 hours and are not considered memorable. Core experiences are typically consumed over a period of one to six hours with the average experience consuming no more than three hours. If the collective of York Region's core and supporting attractors were combined or packaged there *could* exist a reason for guests to stay more than 24 hours or overnight. While York Region's product offering is available to visitors at a variety of price points, the range being from free to \$100, these 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.

York Region 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/historic understanding, skills development and adventure. The range of these activities is not widely promoted and therefore may not be top of mind by potential or existing visitors.

Communities within York Region animate public spaces intermittently to generate interest or excitement in places local residents and visitors congregate. This is identified in particular within the streetscapes of the Region's historic villages and smaller communities including Unionville, Kleinburg, Markham and Schomberg. The Business Improvement Areas, local Service Clubs and Chambers of Commerce typically initiate these activities.

York Region 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 and usually are associated with annual events. For example:

- ◆ The Markham Jazz Festival > *Jeff Healy*
- ◆ Eaglewood Folk Festival > Valdi, Arrogant Worms
- ◆ Magna Hoe Down > Jason McCoy
- ◆ Markham Fair
- ◆ Markham Rib Fest



York Region scores high compared to other destinations when it comes to the variety of dining experiences that are available. The Region boasts a significant number of dining options that feature well known chefs and restaurants with extensive wine lists. These dining options are all available at a variety of price points and are available 365 days a year. Unique to York Region is the variety of multi-cultural dining experiences offering authentic Asian cuisine. This is due in part to the large Asian resident population that resides within the Region. Many other multi-cultural groups call York Region home, and this also contributes to the variety of cuisine guests can experience. The ethnic populations can offer guests a diverse and rich experience through food, music, entertainment, festivals, fashion and design. They also provide a significant “visiting friends and relatives” (VFR) opportunity and in part account for York Regions success in attracting a higher than average number of VFR travellers. The multi-cultural tourism experience represents a significant selling feature for York Region.

In terms of retail shopping experiences, York Region has a long list of recognizable retailers, malls, factory outlets and discount stores. It also has a variety of medium to high-priced specialty stores, galleries, antique and artisan shops and a number of equestrian tack shops. Similar to the dining options, ethnic diversity translates into a number of multi-cultural retail establishments being available. Most retailers and retail complexes tend to be located in the southern part of York Region in close proximity to the resident population.

Satisfaction & Value

This section documents the extent to which York Region 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 York Region is investing in improving performance in these areas.

The Premier Ranked Tourist Destination process identified a significant gap in customer satisfaction research. York Region nor the tourism businesses have visitor experience data that can attest to guest experience related to hospitality, warm and friendly people, and value for money. This lack of visitor data may be cause for concern. While an attempt was made by the Premier Ranked Audit Team to obtain this information through an on site visitor survey conducted through several Hotel properties in the Spring 2006, no reliable results were obtained. However, through industry consultations and peer to peer feedback it appears providing acceptable levels of service is not an issue. One indicator to support this is that key experience and service price points are trending upwards. In addition to an increase in price point, visitation numbers are trending upwards. Therefore one might conclude that guests are receiving some degree of value for money and are receiving acceptable levels of service and hospitality.



Accessibility Rating

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

There are more than 5.4 million people living within a 60 minute drive of York Region and another 7.5 million people within a 5 hour drive. York Region is ideally situated in close proximity to a major international gateway - Toronto is the closest neighbour and borders the southern part of the Region. Niagara Falls, another international gateway and major border crossing is 90 minutes away. York Region is 30 - 45 minutes from Pearson International Airport and is home to the Toronto Buttonville Municipal Airport.

For visitors who travel by automobile or motorcoach the drive getting to York Region is achievable with minimal effort and discomfort. Eight major highways pass through, or are adjacent to the Region. These include the 400 series of highways; 400, 427, 401, 404, 407, and highway 7, 48, and 27. These highways are well maintained year-round and offer more than adequate directional signage. Regional roads are also well maintained throughout the year. They too are well signed and offer satisfactory visitor way finding.

In terms of accessibility for visitors within York Region, traditional tourist transportation services are limited other than a personal or rented vehicle. Public transportation is an option; however it may not be conducive to the visitor. These services include Go Transit, TTC, York Region Transit and VIVA. Taxi cabs are available but not as easily accessible as in major cities. Shuttle or tour bus service has limited availability and pre-arranged service from motor coach or shuttle services can be made. Given the significant geographic area of York Region accessibility within the destination is an issue especially once you move beyond the southern municipalities. This can be a challenge when visitors, without their own transportation, wish to access the variety of tourism products, including accommodations that are available in the northern quadrant of York Region.

York Region's waterfront location on Lake Simcoe offers up to 4 metres of draft and a variety of marinas within excess of 300 slips for transient boaters. Some of these slips are located within close proximity to a town or village that offer some visitor services and tourism experiences.



Accommodation Base

This section assesses the breadth and depth of the York Region'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.

York Region offers visitors a variety of accommodation options with a total of 3341 roofed guest rooms at a variety of price points within close proximity of core and supporting attractors. The accommodation inventory includes "branded" well known chains including Hilton, Best Western, Marriott, Radisson, Super 8, Sheraton, Comfort Inn, Holiday Inn, and Monte Carlo. As well, there are unique facilities including the Kingbridge Centre, Eaton Hall, and the Briars Resort, Spa & Conference Centre.

Type Of Accommodation	Properties	# Of Rooms	Price Range
RV Park/ Campground	4	560	\$8 - \$15
Bed & Breakfast	25	56	\$50 - \$200
Lodge	1	6	\$50
Resort/Hotel/Inn	1	91	\$150 - \$250
Motel – Independent	9	62	\$100 - \$150
Motel - Chain	1	85	\$50 - \$100
Hotel - Independent	1	54	\$50 - \$100
Hotel - Chain	16	2582	\$100 - \$250
Inns	5	155	\$50 - \$100
Conference Centre	5	250	\$50 - \$200
Camps	7	NA	\$15+



PERFORMANCE

Evaluation Rating ▸

The Performance measures identify the extent to which York Region is successful and recognized in the marketplace. By comparing York Region's performance attributes in terms of hard data conclusions can be determined as to its actual performance against its primary competitors and in a competitive marketplace context. 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 York Region's market performance in terms of visitation numbers and market share, attractiveness to different market segments, and different times of the year.

York Region has experienced significant growth in a number of key tourism indicators since 2001. This growth has come against a backdrop of turbulent times in the tourism industry in general and specifically to the Ontario and GTA

marketplace. The incidents of 9/11 in 2001 and the outbreak SARS in 2003 resulted in negative tourism numbers in the ensuing years from coast to coast. This is not the case in York Region.

York Region Travel	2001	2002	2003	2004
Visitation #	2.1 M	2.8 M	2.5 M	3.0 M
Same Day #	1.6 M	2.0 M	1.9 M	2.2 M
Overnight #	565,000	714,000	661,000	798,000
Spending \$	\$152 M	\$172 M	\$184 M	\$209 M

Source: CTS / ITS, Statistics Canada, 2004

The following Statistics Canada CTS/ITS 2004 Travel Survey Data information breaks down visitation numbers and purposes of trip for York Region:

In 2004, same day travel represented 73% of trips taken to York Region and overnight visits accounted for 27% of the trips. Compared to the province as a whole, the Region attracts a higher proportion of same day trips; 73% for York and 61% for Ontario. York Region attracted the majority, 98% of its visitation from the Ontario market. Visitors do originate from the U.S.A. and international markets however York Region falls below provincial averages for visitors from outside Ontario's borders.



York Region	Total	From Ontario	%	From U.S.	%	From International	%
Person Trips	2,975,723	2,737,779	92	153,167	5	59,456	2
Same Day	2,177,954	2,149,935	98	20,552	2	7,466	1
Overnight	797,769	587,844	74	132,615	17	51,990	7
Pleasure	130,000	103,000	79	20,000	15	7,000	5
VFR	516,000	417,000	81	64,000	12	35,000	6
Business	58,000	16,000	28	35,000	60	6,000	10
Other	95,000	-	-	-	-	-	-

Source: CTS / ITS, Statistics Canada, 2004, "Other" Markets Not included

Meetings & Convention (M&C) business is significant at 58,539 trips, but only represents 2% of total M&C trips to Ontario. Meetings and Convention business is a high yield market segment and one that York Region should capitalize on based on the Region being home to many Canadian and International corporate headquarters and manufacturing facilities and the close proximity to Toronto.

While it is difficult to directly align York Region's core attractors to definable provincial trip types, the Region is recognizing a small percentage of trips taken for the purpose of rural and urban experiences, culture and heritage trips, outdoor activities and recreation and sightseeing or touring. In terms of York Region's share of business for its core attractors compared to that of its major competitors, York Region is seeing its fair share when compared to Peel and Durham Regions.

Occupancy & Yield

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

York Region's commercial accommodation occupancy was 61.7% in 2005; this is compared to an industry average of 65%. In 2004, total spending by guests on same day trips was \$63,032,095; this represents 30% of tourism spending within the Region but only 2% of total spending in Ontario. Overnight guests spent \$146,246,867; this represents 70% of tourism spending in York Region but only 1% of total spending in Ontario for the same period. The average expenditure for guests on day trips was \$28.94 compared to \$62.56 average for Ontario. Overnight guest spend on average \$188.32 compared



to \$270.27 average for Ontario. This is due in part to York Region's close proximity to Toronto. Visitors to Toronto stay in Toronto and spend most of their time in there but may venture north to experience a part of York Region's tourism product, therefore they qualify as a York Region visitor. These visitors use Toronto as their base and spend little time or money in York Region.

2004 Visitation			
QTR. 1	QTR. 2	QTR. 3	QTR. 4
24%	19%	34%	22%

Source: CTS / ITS, Statistics Canada

2005 Hotel Occupancy				
QTR. 1	QTR. 2	QTR. 3	QTR. 4	Total
56.4%	73.0%	82.1%	59.6%	61.7

Source: PKF

Critical Acclaim

This section addresses the extent to which York Region 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 if York Region is recognized as standing out from its competitors.

York Region cannot be considered a "must see / must do" destination. Within the markets the Region draws from, several other destinations exist that would rank higher on the list of must see locations. In a competitive set they include Niagara Falls, Niagara on the Lake, Toronto, Muskoka, and Ottawa.

However, many of the York Region's core and supporting attractors and business operators do have critical acclaim. Canada's Wonderland is Canada's largest theme park and attracts more than 3 million visitors annually. It is often featured in travel literature about the Greater Toronto Area and does have some recognition on a national and perhaps international scale. Angus Glen Golf hosts Canadian golf championships and is widely recognized as one of the countries top golf venues. The McMichael Canadian Art Collection has notoriety on a national scale due in part to its vast collection of Tom Thomson and the Group of Seven works.



FUTURITY

Evaluation Rating ▸

Futurity identifies the extent to which York Region 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 in 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 York Region targets viable markets, invests in managing and promoting its tourism marketplace, and consults with the travel trade serving York Region. The evaluation identifies if York Region is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.

Within York Region there is a recognized Destination Marketing Organization (DMO) that is involved in tourism and tourism marketing on a regional, provincial, national and international scale. That organization is York Region Tourism. York Region Tourism's recognition is validated through an annual marketing strategy, an identifiable annual marketing budget and viable and ongoing partnerships with Tourism Toronto, the Ontario Tourism Marketing Partnership Corporation, various Provincial Ministries and the Canadian Tourism Commission.

Other organizations in York Region are involved in tourism either at a Municipal level or through Business Improvement Areas and Chambers of Commerce. All have some role in the tourism industry whether it is in the area of product development, research, marketing or visitor services.

Tourism is part of the Economic Development Branch of the Planning and Development Services Department for York Region. York Region Tourism operates as a destination marketing organization funded by Regional government and has human resources assigned to the tourism program. However, compared to other destinations with similar populations and tourism product it is considered insufficient based on the potential available. In spite of this, York Region Tourism does take advantage of a wide variety of co-op



marketing opportunities and funding partnership programmes with the Ontario Tourism Marketing Partnership Corporation and Tourism Toronto.

Currently York Region Tourism has an annual marketing strategy but has limited capabilities to track the effectiveness of these activities, except anecdotally. York Region does not have a long term tourism development strategy in place and without a long term vision it is difficult for York Region Tourism to benchmark performance metrics.

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. 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 York Region is making capital investments in its attractiveness into the future. The evaluation documents the status and magnitude of York Region'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 including the building of new hotel properties and capital investments or enhancements to museums, galleries, attractions, hotels, restaurants, and retail sectors. There is evidence of an ongoing commitment to continually reinvest in programming and infrastructure development.

Even with the high degree of product investment there still is under performing and under developed tourism assets within York Region. They include but are not limited to the heritage and cultural attractions. Often times these not-for-profit or public facilities don't have the capital dollars to reinvest in infrastructure or programming. Given that the culture and heritage product is part of the core attractor experience a careful review of the current viability, attractiveness and sustainability of these types of facilities is warranted. Steps should be taken to improve the performance of these assets.

New Canadians are the fastest growing segment of York Region's population. Between 1991 and 2001, 69% of Canada's population growth was a result of people immigrating to Canada. In York Region the new Canadian population is



increasing at a faster pace than the non-immigrant population. Between 1991 and 2001 the number of immigrants increased by 132% compared to 31% for non-immigrants. Since 1981 there has been a dramatic shift in the main place of origin of the Region's recent immigrant population; from Southern Europe to Asia and Eastern Europe. 71% of recent immigrants are visible minorities with Chinese being the most commonly represented visible minority group. 39% of recent immigrants to York Region are from Eastern Asia, 17% from Eastern Europe and 16% from Southern Asia. The significant growth in ethnic diversity and the associated supporting cultural and business community that comes along with it represents a unique tourism opportunity for York Region.

These cultures express their diversity through unique foods, entertainment, art, culture, events, and retail offerings. There appears to be a willingness among these groups to share this cultural diversity with the main stream resident and visitor populations. Building the profile of York Region's multi-cultural tourism experiences is an opportunity worth exploring.

In addition, these same communities represent a significant opportunity related to the "visiting friends and relatives" (VFR) market. These individuals now, and increasingly will, invite their family and friends to visit their new Canadian home. These trips are typically long stay visits in excess of 5 days

and while some will stay with their family or friends many will choose to stay in paid commercial accommodations. These visitors, most from overseas, hosted by their relative or friend should experience York Region as tourists by visiting attractions, heritage sites, events and festivals, retail and dining establishments. It will be important to provide the new Canadian resident information about the wide variety of things to see and do in their home town if York Region wants to maximize the economic yield from these visitors.

Another area that may be under developed relates to the equine product in York Region. A significant inventory of equestrian related product does exist including training, breeding, riding, boarding, event/show and retail aspects of the horse business but it is not currently being exploited as a tourism product. While it is considered a niche tourism product opportunity it does represent high yield potential and further product development may be warranted.

Managing Within Carrying Capacities

This section assesses the extent to which York Region 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 York Region's ability to manage the system that sustains it.



Tourist visits to York Region make a net positive contribution to the local economy. This is demonstrated by over \$209 million in direct visitor spending and the ripple effect of this spending is felt throughout the entire region. This ripple effect equates to \$148.6 million in total economic activity (GDP). This spending also positively impacts tax revenues for federal, provincial and municipal governments. In 2004, 2121 direct and 528 indirect jobs were generated within York Region across all sectors of the tourism industry as a result of this tourism spending. Stable investment and a vibrant skilled and semi-skilled labour force are also present within York Region.

While in some destinations, growing visitation from tourists impacts the local resident's cost of living, this is not the case in York Region. Housing costs have risen in the Region due primarily to economic growth and not as a result of a growing tourism market. Increased visitation has not threatened the visitor experience, so overcrowding and overuse are not being cited as reasons not visit York Region. Traffic congestion and parking may be an issue in parts of the Region during peak travel times.

In terms of understanding and managing the labour force York Region's paper entitled *Employment & Industry in York Region* details how it is well prepared to capitalize on its skilled and semi skilled work force. This does not seem to be an issue

within the foreseeable future, however through industry consultation we learned that finding skilled hospitality workers can be a challenge.

Managing the carrying capacities of the natural systems that sustain local ecosystems and quality of life within York Region are well understood and monitored. York Region's *Vision 2026 Long Term Plan* details the plans to manage this important area. Growth in tourism will not tax current and future infrastructure. York Region is well 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.

As it relates to understanding and capitalizing on the opportunities associated with a thriving tourism industry, local and regional governments do not appear to have tourism related objectives in their Official Plans. While area Municipalities and York Region as a whole are interested in attracting visitors, most have not formally recognized tourism as a key economic engine. This could impact negatively future growth and investment from the tourism sector as well as, restrict York Region Tourism from proactively growing tourist visitation and expenditures.



KEY FINDINGS

The following is a summary of the primary findings from the Premier Ranked Tourist Destination process. These are the identified gaps in York Region's tourism product. Against a backdrop of the positive attributes of York Region, these findings represent the growth areas and provides direction and recommendations that if addressed successfully could improve York Region's attractiveness and success in attracting more visitors and increasing revenues.

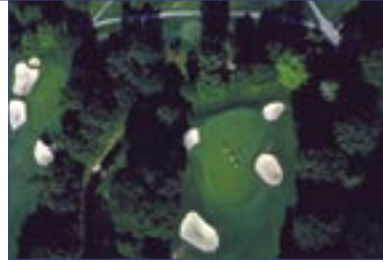
Product:

- ◆ York Region's tourism experiences are not necessarily memorable and may not motivate tourist traffic compared to other destinations
 - › It will be important to develop new product experiences utilizing the existing core and supporting attractors. This is needed along with ongoing strategic marketing and promotion of York Region
- ◆ Guest experience, satisfaction levels and value for money metrics are not tracked or monitored
 - › While delivering good service and value for money does not appear to be an issue, not knowing how visitors perceive the tourism experience is risky if York Region wishes to grow visitation and tourist revenues

- ◆ Guest experience is typically less than 24 hours
 - › To maximize yield York Region must increase its overnight visitation especially in paid commercial accommodation
- ◆ Core & Supporting Attractors are not widely promoted, are not superior because of the experiences offered, are under developed and are under performing
 - › As a regional complex the attractors offer significant potential. Focus is needed however to fully develop and enhance these experiences and at the same time positioning and marketing of the core attractors is warranted

Performance:

- ◆ Building the current level of same day visitation will not maximize economic impact and/or provide for long term sustainability or growth
 - › The true economic value from same day visitors will come when their length of stay increases, York Region must be creative in clustering/bundling tourism experiences while building and marketing the profile of York Region as an all encompassing destination



- ◆ Core & supporting attractors are not generating levels of visitation comparable to other destinations within Ontario
 - › Effective positioning and marketing is key to increasing visitation
- ◆ Hotel occupancy is below industry standards
 - › In a competitive marketplace York Region has a unique selling proposition when it comes to accommodations. Collective efforts are required to build overnight share and increase occupancy in a Greater Toronto Area context
- ◆ Visitor expenditures are well below provincial averages
 - › Driven by a higher than average number of same day visitors, York Region must focus attention on increasing the length of stay from same day visitors and increase the number of visitors who stay overnight
- ◆ While York Region has iconic tourist attractions they do not have critical acclaim and are not must see / must do experiences
 - › This gap can be attributed more than anything to low levels of awareness. Efforts to increase profile of iconic experiences through Public Relations and unpaid media coverage should be undertaken

- ◆ York Region has few “best in class” products and experiences
 - › Symptomatic of many destinations York Region must first raise the profile and awareness of its iconic attractions, secondly it must “bundle or cluster” its collection of experiences to move towards becoming “best in class”

Futurity:

- ◆ The Region does have a recognized Destination Marketing Organization (DMO) in York Region Tourism
 - › York Region has invested in the development of a DMO and should consider further investment and enhancement to the resources allocated to this effective department
- ◆ A long term destination development strategy is not in place
 - › Currently York Region does not look beyond its annual marketing plan. Many competitive destinations already have long term destination development strategies in place. For York Region to continue to reap the economic benefits from tourism visitation and expenditures, it is recommended that this issue be addressed



- ◆ York Region does not have a “tourism” brand positioning statement or logo
 - › This is negatively impacting awareness levels, visitation and tourism receipts. York Region as a destination and its core attractors are unclear in the minds of potential visitors without clear positioning
- ◆ York Region Tourism does not have sufficient funding to reach potential visitor target markets effectively
 - › An increase in resources directed at tourism product development and marketing are required to grow visitation expenditures in York Region. A compelling return on investment story can be told using the success of competitive tourism destinations who invest adequately in destination development and marketing
- ◆ A Regional marketing strategy is in place with limited performance measurement to monitor or track effectiveness
 - › Adding performance and economic impact metrics to marketing initiatives will support the need for ongoing and increased investment
- ◆ Opportunities exist to understand the product areas that are under developed including not-for-profit cultural & heritage attractions, recreation & natural events / activities and equine product
 - › Focus on this area will enhance the attractiveness of York Region as a destination overall and specifically to the businesses involved
- ◆ The multi-cultural product appears to offer future growth potential
 - › This will come in two ways; first by offering visitors unique multi-cultural tourism experiences expressed through events and festivals and ethnic dining and retail experiences. Secondly, by tapping into the growing visiting friends and relatives market
- ◆ The Visiting Friends and Relatives market offers growth potential
 - › Equipping local residents to act as tourism ambassadors and encourage the inviting of friends and relatives to visit is a logical strategy given the growing new Canadian population that exists in York Region
- ◆ No guest service training initiatives are in place
 - › Delivering excellent service and hospitality is fundamental to the future success of York Region. If successful it can be part of the Regions positioning and unique selling proposition



RECOMMENDATIONS

Based on the key findings, the following recommendations have been developed in consultation with the Premier Ranked Steering Committee, the York Region Tourism Advisory Group and tourism stakeholders. Both immediate and long term action steps have been identified. It will be the role of York Region Tourism staff in consultation with the York Region Tourism Advisory Group, subject to Regional Council approval and sufficient budget allocation, to take responsibility for the successful implementation of these recommendations.

Immediate

- ◆ Initiate the process to develop a Long Term Tourism Destination Development Strategy that includes the “positioning / branding” of York Region as a tourism destination
- ◆ Reinforce through consistent marketing the core and supporting attractors
- ◆ Reinforce and secure buy-in for the Region’s “*Character Community*” philosophy to support a high level and customer service
- ◆ Capitalize on the Visiting Friends and Relatives market:
 - › Establish a resident based “*tourist in your own town*” programme
 - › Establish tourism partnerships with key multi-cultural communities
- ◆ Identify tactics to extend length of stay
 - › Facilitate industry partnership through education
 - › Cluster experiences, develop itineraries, package
 - › Capitalize on the GTA market to grow day-trip visitation / expenditures
- ◆ Schedule workshops throughout York Region and deliver them in partnership with BIA’s, Chambers, and Municipalities. Use Ministry of Tourism and other established curriculum:
 - › Tourism Inc. (market readiness training)
 - › Demand Generators (destination development)
 - › Tourism Keys (customer relationship management)
 - › Annual hospitality and service excellence training



Long Term

- ◆ Use the Long Term Tourism Destination Development Strategy to:
 - › Establish a brand position for York Region
 - › Research travel motivations, behaviour & customer experiences specific to York Region
 - › Enhance under developed products: culture and heritage, multi-cultural fabric, rural experiences
 - › Identify product development opportunities; equine, meetings and conventions, sports and recreation, Visiting Friends and Relatives
 - › Raise the profile and awareness of the importance of tourism among key internal audiences; residents, business leaders, politicians, service clubs, municipal and regional stakeholders
- ◆ Connect product experiences available in the north with infrastructure in the south
- ◆ Explore ways to improve visitor transportation within York Region
- ◆ Grow tourism marketing budgets through partnerships - Tourism Toronto, Ontario Tourism Marketing Partnership Corporation, Ministries, Business Improvement Associations, Chambers of Commerce and area Municipalities
- ◆ Clearly define the roles and responsibilities of York Region's tourism partners



NEXT STEPS

The Premier Ranked Tourist Destination process has provided a clear appraisal of York Region's competitive position in the tourism marketplace and a benchmark to measure future performance. The findings validate that York Region's tourism program is effective and successful based on the current level of investment and resources allocated. The research confirms that York Region as a tourist destination does have market and investment appeal and based on Regional efforts to successfully manage within carrying and infrastructure capacities, is well-prepared to handle growth in tourism visitation. The inventory of tourism resources and assets provides a solid foundation for the development of a tourism strategy to position York Region as an exciting and vibrant destination that should be considered first when making travel plans.


Based on these findings, York Region Tourism and the York Region Tourism Advisory Group will work with area Municipalities and industry stakeholders to begin to incorporate recommendations that can be implemented within the parameters of the approved 2006 tourism program and budget. A Regional commitment for additional funding and staff resources will be required in 2007 for continued implementation of the recommendations through an enhanced tourism program that includes the undertaking of a tourism development strategy and brand positioning that will assist York Region to capitalize on the potential economic impacts from tourism.



CONCLUSION

Tourism has tremendous potential to enhance job and wealth creation within local municipalities while contributing to the quality of life for all residents. The implementation of the recommendations in partnership with local municipal efforts supports building and diversifying jobs and economic growth. The Premier Ranked Tourist Destination project provides a database of critical baseline data that paints a clear picture of York Region's strengths and weaknesses and provides direction to pursue to improve tourism industry success and augment local municipal tourism efforts. The Premier Ranked Tourist Destination process involved several critical steps along the way plus a serious commitment and investment of time by the industry partners involved. The result in part is an expanded network of area municipal stakeholders who have a more cohesive focus on solving ongoing and future tourism challenges.

The findings and recommendations in this report will assist to craft the strategic direction and vision that fosters strong urban and rural communities and facilitates partnerships to strengthen competitiveness and encourage development and investment opportunities for York Region.

A photograph of a woman and a young child in an orchard. The woman, wearing a pink top, has her arm raised towards a branch of a tree laden with ripe, reddish-pink fruit. The child, wearing a white shirt and a blue hat, is holding one of the fruits. The background is a clear blue sky.

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