



ONTARIO'S LAKE COUNTRY TOURISM ASSET MAPPING (TAM) PROJECT

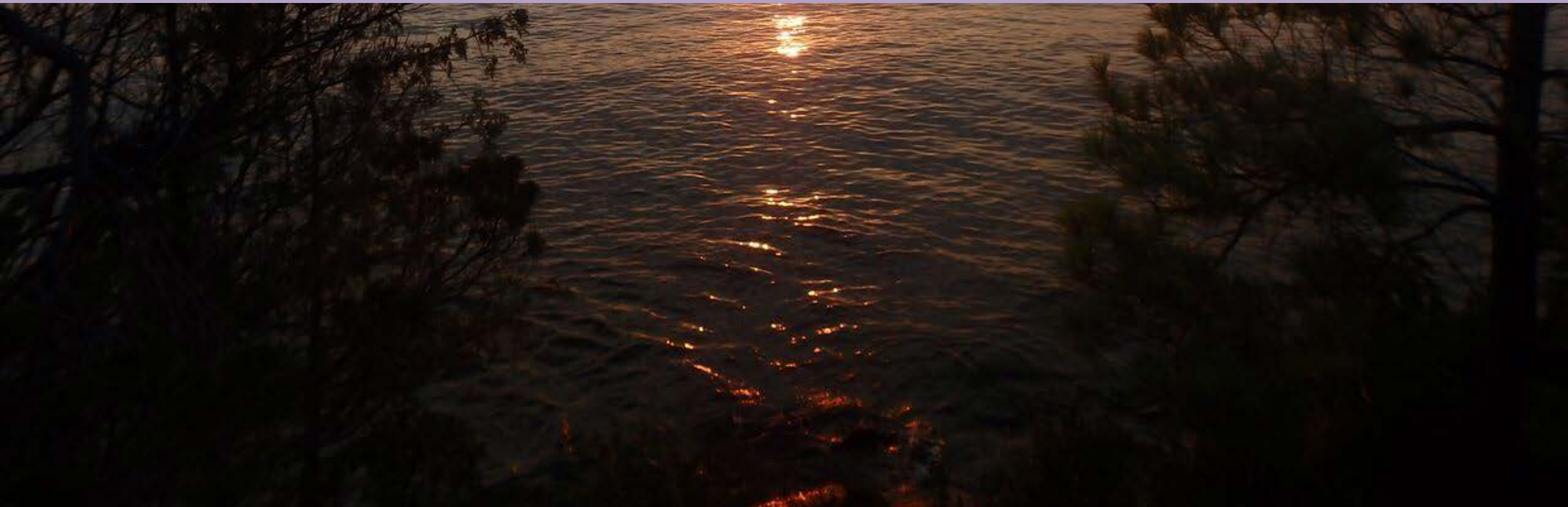
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1: Project Purpose and Objectives



1 Project Purpose and Objectives

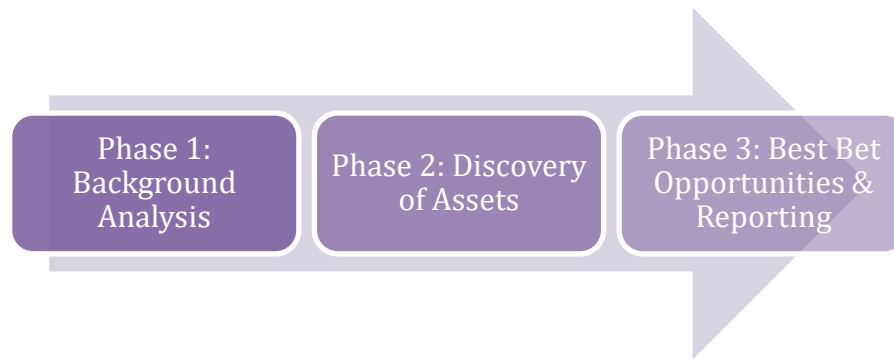
Ontario's Lake Country (OLC) comprises the townships of Oro-Medonte, Severn, Ramara, the City of Orillia, and the Rama First Nations (see map to the right). For the purposes of this report, all references to the 'region', or 'regional initiatives' are meant to include the above noted areas. These communities are nestled within some of southern Ontario's most scenic, water-front landscapes along Lake Couchiching and Lake Simcoe. Accordingly, the area is a popular year-round tourism destination offering a variety of recreation-based, cultural, and event-based activities that draw on the region's natural landscape. Its proximity to the GTA makes the area particularly attractive for day-trippers and weekend visitors. Despite its natural appeal to tourists, the region faces stiff competition from nearby regions including Muskoka and the Blue Mountains area.



The Tourism Asset Mapping (TAM) project had three objectives:

1. To identify demand generator tourism assets across the region through the development of an inventory with associated mapping;
2. To assess best practice in terms of the most valued investment tourism assets in Southern Ontario; and
3. To identify opportunities for tourism development in the region.

The project was structured into three phases:



Phase 1: Background Analysis:

The TAM project builds on a broad body of work that has been developed on tourism within the region:

- Mariposa Folk Festival Audience Survey (2015);
- Exit Surveys from Wayhome and Boots and Hearts – Burls Creek (2015)
- Visitors Survey from Ontario's Lake Country and the City of Orillia (2013-2015);
- TNS Consumer Insight Research for RTO 7 (2013);
- Ontario's Lake Country Branding Study (2013);
- Ontario RTO 7 Strategic & Winter Leisure Travel Studies – Barrie Visitor Analysis (2012);
- Orillia and Area Tourism Roundtable Summary Report (2012);
- RTO 7 Waterways Product Assessment (2011);
- City of Orillia: Economic Impact of Parks and Recreation Tourism Program (2011);
- Premier-Ranked Tourism Destinations Framework Project – Lake Simcoe Tourism Area Assessment (2007);
- Ontario Tourism Infrastructure Research Study – Province of Ontario (2009)
- Ryerson University: Assessing Visitor Travel & Spending Patterns for Recreation & Tourism in the Lake Simcoe Watershed;

Phase 2: Discovery of Assets:

The second phase of the TAM project built on the findings of the background review.

This phase entailed:

- The development of a tourism asset inventory;
- The development, distribution and analysis of two online surveys
 - o One tailored to local tourism operators;
 - o One tailored to the general public; and
- Mapping of the asset inventory.

Phase 3: Best Bet Opportunities & Reporting:

- Collection and review of local market statistics and reports;
- Field interviews with key stakeholders;
- An overview of adjacent destinations;
- Draft criteria for evaluating opportunities; and
- Identification of best bet opportunities.



2: Asset Inventory & Mapping

2 Asset Inventory and Mapping

2.1. Identifying Demand Generators

Asset inventories are developed for specific purposes. For example, the tourism asset inventories that are currently managed by Simcoe County and Ontario's Lake Country have been developed to provide a fulsome picture of all tourism assets that exist in the region – both primary demand generators (those assets that independently draw visitors into the region), and supporting infrastructure (assets that may not attract visitors to the region but are necessary to support their visit or stay).

The purpose of the inventory developed for the TAM project was to identify positive demand-generator assets in the region. To achieve the stated goal of the inventory, the focus had to be on assets that attract visitors to the region. This was not to diminish the importance of supporting assets that ensure that visitors have access to necessary services during their visit/stay in the region. Examples of supporting assets that may be used by visitors to the region, but would not be classified as a 'tourism asset' for the purposes of this project's inventory, are businesses providing services primarily used by residents (e.g. gyms, banks, real estate offices etc.), and big box stores, and chain restaurants that are found in communities outside of the region.

The development of the inventory entailed an analysis, update, and filtering of the existing tourism asset inventories, complemented by visitor and tourism operator surveys, and consultation with the project's steering committee. To guide the process of inventory development, a table of inclusions and exclusions was developed. This table was intended to provide initial direction during the inventory development, and also to provide rationale for including and excluding assets.

Table 1: Orillia TAM Inventory: Guide to Inclusions and Exclusions

Category	Inclusions	Exclusions
Accommodations	Accommodations that are viewed as a unique experience and/or destination for visitors. Examples could include resorts, bed and breakfasts, etc.	Hotels, motels, and other accommodations that do not provide a unique or otherwise 'different' experience for visitors. Examples include chain hotels.
Adventures	Indoor and outdoor adventures that are unique to the region that do not fall under other categories. Examples could include tree top trekking, horseback riding, etc.	Adventures that are commonly found in other communities and are not unique or different from the norm.
Agri Eco-Tourism	Farmers markets. Farms open and marketed to the general public with local produce. Specialty produce businesses/farms e.g. maple syrup, cheese etc.	Farms not open to the general public.
Arts	Museums/Galleries. Artist studios with storefront. Theatres.	Community art groups. Art studios without storefronts.
Beaches	Publicly accessible beaches.	Non-publicly accessible beaches.

Category	Inclusions	Exclusions
Boating	<p>Boat tours/cruises.</p> <p>Marinas.</p> <p>Boat launch ramps that are publicly accessible.</p>	Private boat launches with no open public access.
Camps	Youth camps that attract out-of-region visitation.	Day camps.
Camping/RVs	Camp sites and trailer parks that predominantly attract out-of-region visitation.	--
Canoe/Kayak/Paddling	<p>Outfitters, and outlets with rentals.</p> <p>Beaches and waterbodies identified as suitable for leisure canoe and kayaking.</p> <p>Businesses providing canoe/kayak lessons.</p> <p>Identified canoe and kayak routes.</p>	Stores selling canoes/kayaks that primarily serve the local community, e.g. Canadian Tire.
Culinary	Locally owned and operated/specialty bars, restaurants, and culinary experiences.	Bars, restaurants, and culinary experiences that are commonly found in other communities (e.g. chains), and those that offer fare and/or an experience that is commonly found in other communities.

Category	Inclusions	Exclusions
Cultural Tourism	Unique cultural experiences and attractions within the region that are not found ubiquitously outside of the region.	Cultural experiences and attractions within the region that are found ubiquitously outside of the region.
Cycling	Cycle paths/trails. Outfitters/stores with rentals.	Bike shops that cater primarily to the local residents.
Event/Conference Facilities	Facilities that provide a unique or different draw for organizers and attendees. An example would be Burls Creek.	Hotel conference rooms, banquet halls, and other event/conference facilities that are commonly found in other communities and provide no unique draw for organizers or attendees.
Festivals/Events	Festivals/events that draw visitors from outside the region.	Festivals/events for which attendance is primarily local.
Fishing	Fishing charters. Outfitters. Specialty stores that have a substantial out-of-area customer base. Bodies of water suitable for fishing that are likely to attract out-of-region visitation for fishing.	--
Gaming	Casinos.	Hotels.
Golfing	All courses.	--

Category	Inclusions	Exclusions
History/Heritage	Buildings/attractions with historical/heritage links, that provide a historical service. E.g. museums, historic experiences etc.	Buildings with heritage status that are not used for a heritage/history-based use.
Music Venues	Music venues that currently, or have potential, to host concerts and events that attract out-of-region visitation.	Venues that host predominantly local musical concerts and events.
Nature-Based Tourism	Nature parks, Simcoe County Forest tracts, conservation areas, provincial parks, national parks.	---
Organized Tours	Tour companies operating in the region that attract significant out-of-region visitation.	--
Parks	Parks with facilities/amenities/attractions that attract visitors from outside of the region.	Neighbourhood parks and others that primarily cater to local residents.
Shopping	Stores/complexes that attract visitors from outside of the region. Specialty stores/complexes such as outlet malls.	Stores/complexes that primarily serve the local population and/or are found ubiquitously outside of the region.

Category	Inclusions	Exclusions
Spa/Wellness	Spa/wellness facilities that attract out of region visitation.	Spa/wellness facilities that primarily cater to local residents. Spa/wellness facilities that are chains that are found in communities outside of the region.
Sports Tourism	Facilities and events that attract visitors from outside of the region. Facilities and events that provide specialist sports experiences. Facilities and events that allow for high performance athlete training and development.	Sports facilities and events that primarily serve the local community. Sports facilities that are found ubiquitously outside of the region. Community-scale sports facilities.
Trails	All	--
Visitor Information	Visitor information points that primarily function for this purpose.	Locations that offer visitor information, but that primarily function for other purposes.
Watersports	Destinations for watersports. Outfitters. Marinas.	Stores and other businesses selling water sport supplies that are ubiquitous in other communities.

Category	Inclusions	Exclusions
Winter Sports	<p>Ski hills.</p> <p>Snowshoe trails.</p> <p>Outfitters, and stores with rentals.</p> <p>Snowmobile rentals.</p>	<p>Stores selling winter sport supplies that primarily serve the local community, e.g. Canadian Tire.</p>

2.2. Orillia Area Tourism Asset Inventory and Mapping

The resulting tourism asset inventory is provided as an appendix to this report. The inventory contains a total of 403 unique entries, organized by category. Each entry includes the following information:

- Asset Name;
- Street Address;
- Municipality;
- Phone Number;
- Categorization; and
- URL (where applicable).

The inventory is a flexible product that can be used by the Orillia Area CDC, Ontario's Lake Country, or any of the participating municipalities for a variety of purposes. It also provides Ontario's Lake Country with updated entries for those businesses within their existing inventory, and additional entries that were not previously included.

The mapping produced for this project is provided as an appendix to this report. The consulting team produced individual maps by category, and also a series of clustered maps that identified complementary asset categories. Specifically, the following clustered maps were produced:

- **Nature-Based Activities:** Agri- and eco-tourism adventures, cycle routes, cycle rentals/stores, nature parks, and municipal parks.
- **Retail and Wellness:** Bars and restaurants, spa and wellness businesses, and primary demand retail stores.
- **Sports-Based Activities:** Winter sports destinations, sport tourism events, municipal parks, and nature parks.
- **Water-Based Activities:** Fishing points of interest, canoe and kayak rentals, canoe and kayak routes, beaches, boating, watersports.

Broad trends identified by the mapping include:

- The region has a strong inventory of outdoor-based tourism assets. For example:
 - o Winter activities are strong demand generators, with activities centred around Horseshoe Valley, Hardwood Ski and Bike, and Mount St. Louis.
 - o Water-based activities centred around Lake Simcoe and Lake Couchiching, as part of the Trent Severn Waterway, are primary demand generators. Other lakes and waterways are strong supporting assets with potential to grow their offer with development.
 - o Nature-based activities focused on the region's provincial parks, conservation areas, tracts of Simcoe County Forest, and Copeland Forest. These are connected by, and future connections should focus on, cycle trails and walking trails.
- The region's commercial centre is focused on Orillia: There is opportunity for further development and marketing of Orillia as authentic small-town retail, in addition to leveraging the downtowns of the smaller communities in the region.



3: Market Assessment

3 Market Assessment

The following provides an assessment of the current visitation to the region. For this assessment we draw on visitation statistics from the Ministry of Tourism, Culture and Sport (MTCS), in addition to existing studies conducted on visitation and visitor awareness of Simcoe County.

3.1. Review of Regional Visitation Statistics

3.1.1. Ministry of Tourism, Culture and Sport (MTCS)

The most current statistics available through the Ministry of Culture and Tourism are the 2012 data for Simcoe County extracted from the International Travel Survey (ITS) and the Travel Survey of Residents of Canada (TSRC). The data is available on the Ministry's website by Regional Tourism Organization (RTO). The Ontario's Lake Country region is situated within Region 7 of the Province and covers Bruce, Grey and Simcoe Counties. Data can also be requested by County, which in the case of the Ontario's Lake Country region means Simcoe County. The three townships, First Nation and City of Orillia that comprise the region represent just a portion of Simcoe County (approximately 16% by population and over 30% by geographic land mass). However, the County level data provides a useful piece of insight to help paint the tourism picture for the region.

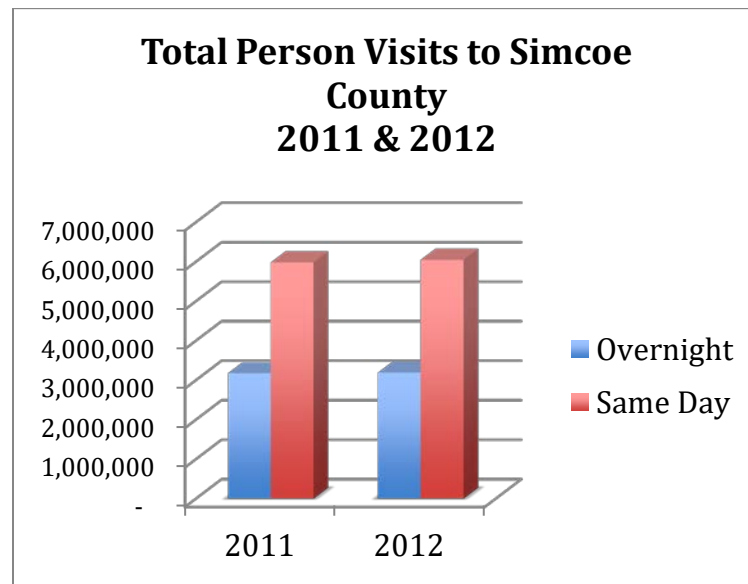
In 2011 Statistics Canada changed the methodology for the Travel Survey for Residents of Canada (TSRC) and the International Travel Survey (ITS). Accordingly, the data prior to 2011 is no longer directly comparable to the more current data. Moreover, the data uses a relatively small sample size that negatively impacts its reliability. With these caveats however, the data does provide a useful benchmark to begin understanding visitation patterns to Simcoe County.

Data indicates gradual growth in both overnight and day-trip visitation between 2008 and 2010. The following chart presents the visitation numbers for 2011 and 2012 illustrating a slight increase in day

visits and relatively flat overnight visitation. 2012 is the last year that these statistics will be available by county level as Statistics Canada have suppressed the CD level data for the International Travel Survey.

Figure 1: Total Person Visits to Simcoe County 2011-2012

Source: Statistics Canada TSRC & ITS

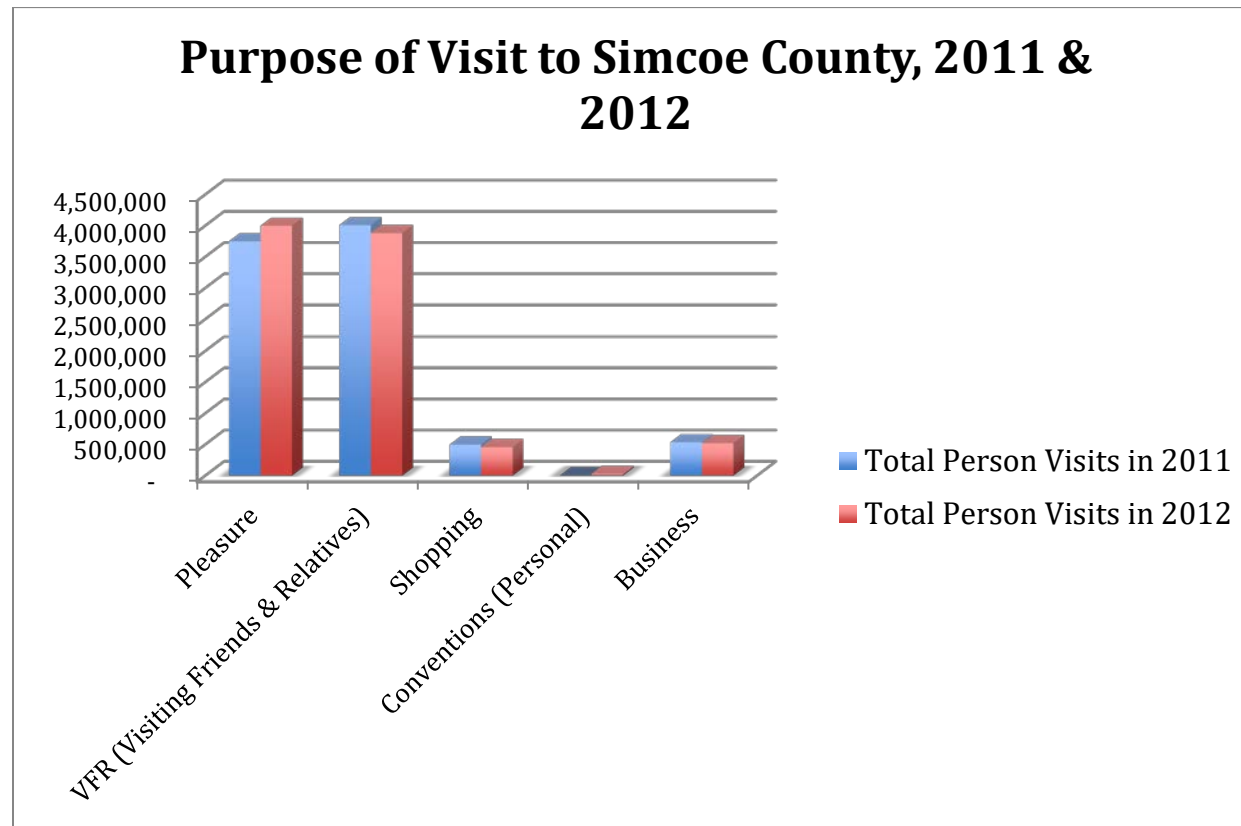


There were an approximate total of 9,074,054 person visits to Simcoe County in 2012, 35% of which were overnight visitors and the rest day visitors. The vast majority of all person visits originated in Ontario (99%) with 20% coming from within Simcoe County (travelling more than 40km to qualify as tourists) and a further 50% coming from Metro Toronto/York/Durham/Peel. The majority of visitors (71% of total overnight person visits) stayed in private homes or cottages (31% in cottages) and a further 20% stayed in commercial roofed accommodations.

In 2012 the predominant trip purposes were for pleasure followed by visiting friends and relatives (VFR).

Figure 2: Main Trip Purpose for Simcoe County Visitors (2011)

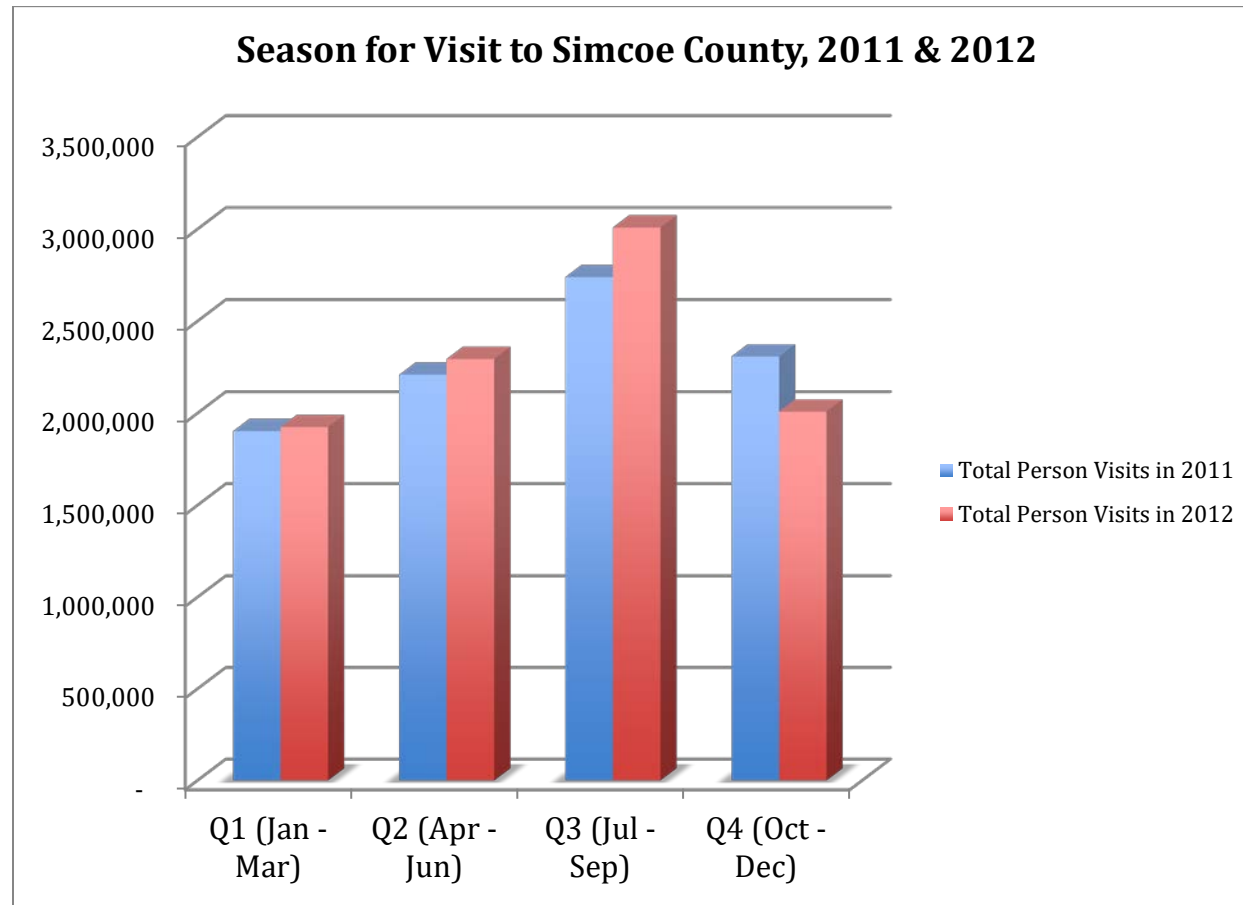
Source: Statistics Canada TSRC & ITS



Travel to Simcoe County in 2011 was stronger in the summer months, increasing as a proportion of the total in 2012. The following chart illustrates the important point that the County receives significant year round visitation.

Figure 3: Season of Travel for Simcoe Visitors (2011)

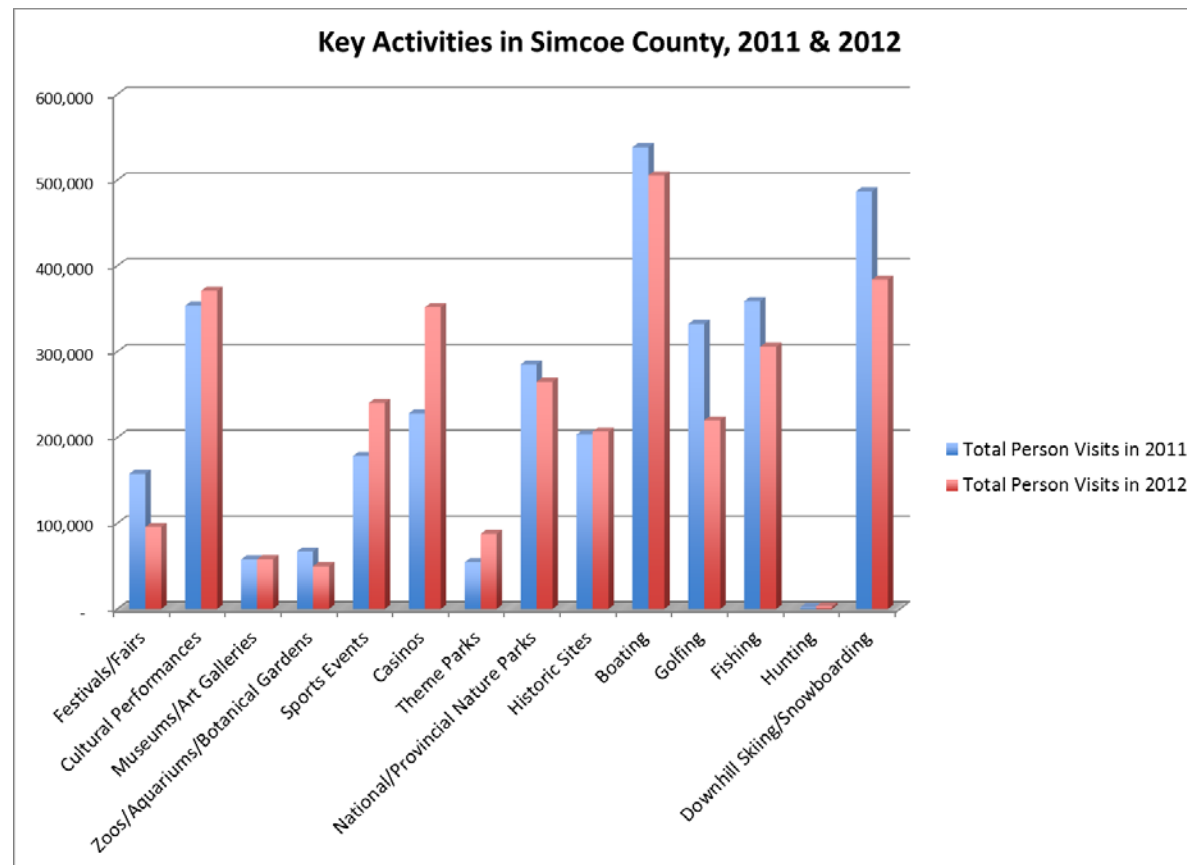
Source: Statistics Canada TSRC & ITS



The following chart illustrates the key activities as measured in the TRCS and ITS for visitors to Simcoe County in 2011. It is interesting to note the size of the skiing market in comparison to the main summer draws of boating, fishing and golfing (i.e. it is large in comparison to the relative size of the skier market in comparison to the huge fishing, boating and golfing markets).

Figure 4: Key Activities for Simcoe County Visitors (2011)

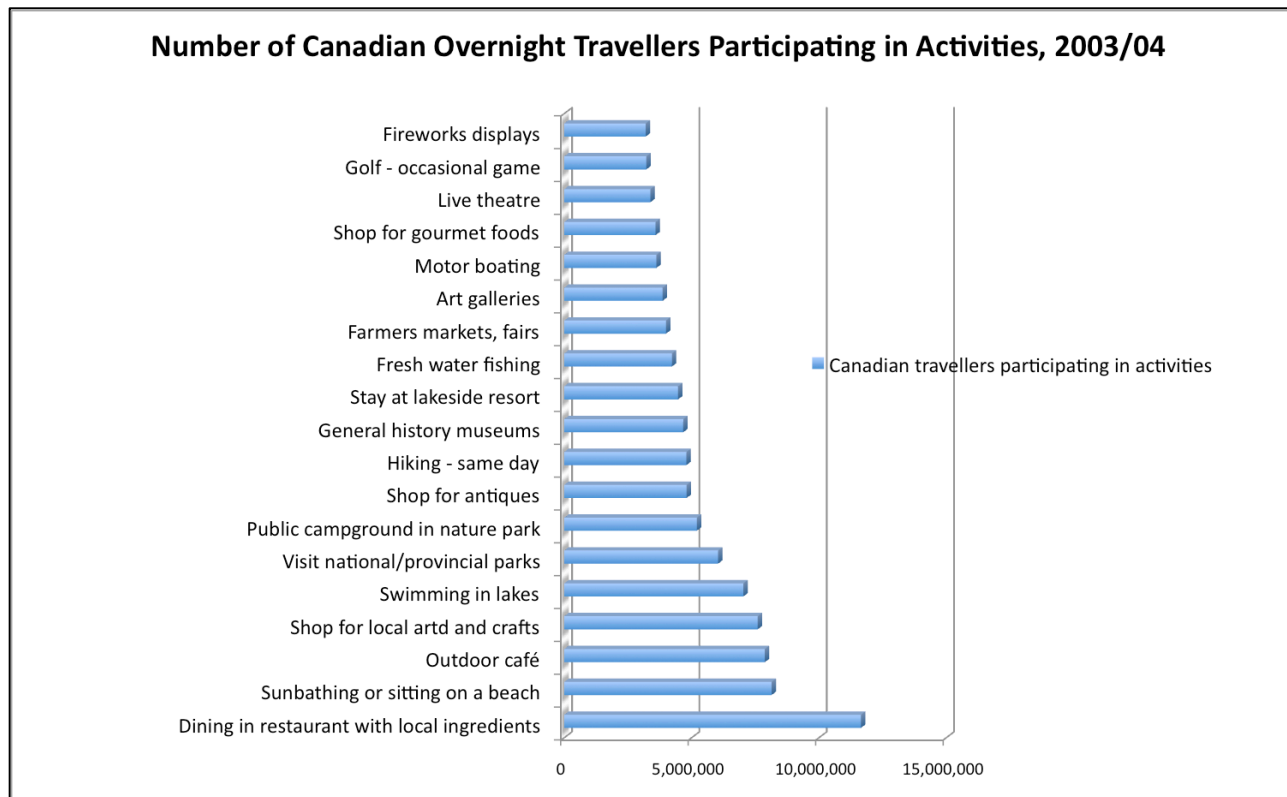
Source: Statistics Canada TSRC & ITS



To give some sense as to the scale of activity market opportunities the following two charts have been created from the TAMS (Travel Activities and Motivational Survey) database completed in 2006, utilizing 2003/04 data. They illustrate the relative scale of each activity market in Canada. Although dated, this is still the best source for this type of data. The first chart illustrates those activities relevant to OLC with over 3 million travellers participating while on an overnight trip.

Figure 5: Number of Canadian Overnight Travellers Participating in Activities (over 3 million travellers)

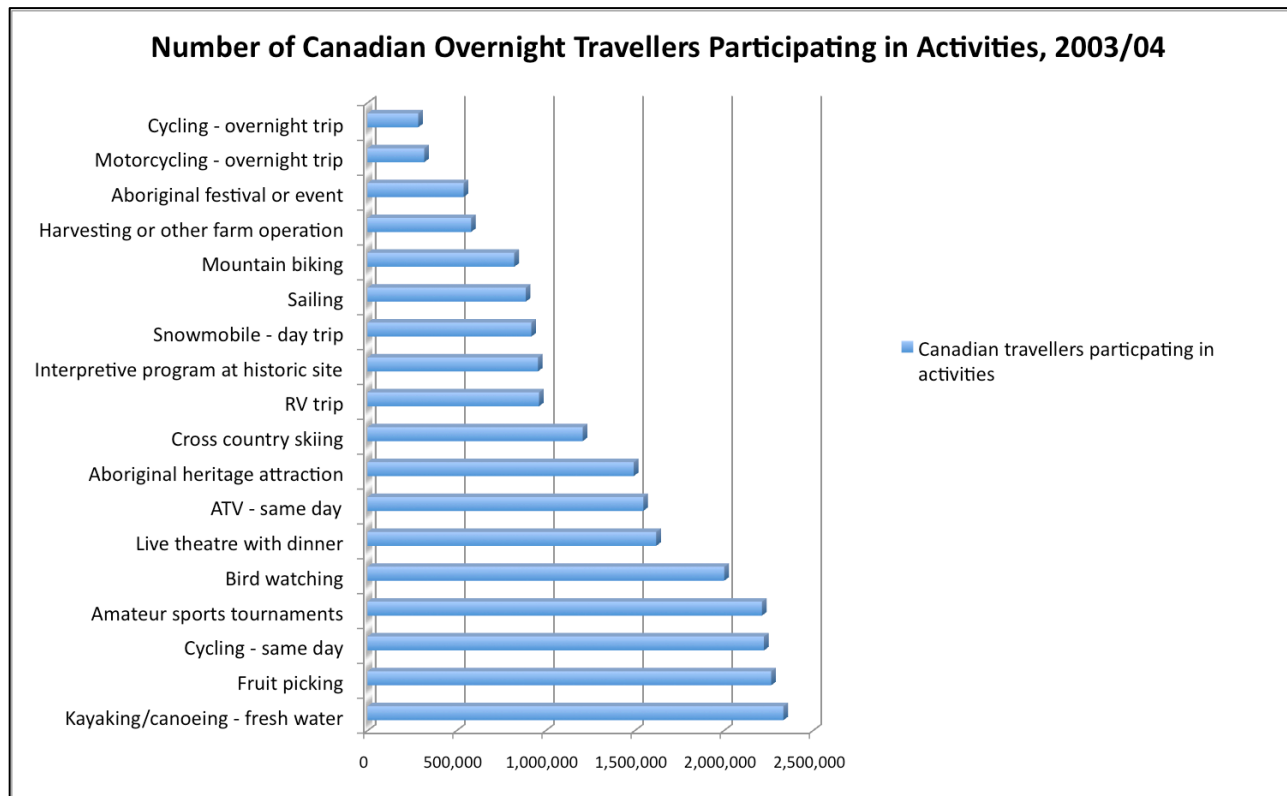
Source: Travel Activities & Motivation Survey (2006)



The following chart includes those activities relevant to OLC with under three million travellers participating while on an overnight trip.

Figure 6: Number of Canadian Overnight Travellers Participating in Activities (under 3 million travellers)

Source: Travel Activities and Motivation Survey (2006)



3.1.2. Review of Existing Local Reports

The OLC region is located within Region 7, and the Lake Simcoe Tourism Area. Previous studies on the area identified the following as the region's core attractors of the area as a tourism destination.

Table 2: Identified Core Attractors for the Lake Simcoe Tourism Area

Source: 2007 Premier-Ranked Tourism Destinations Framework Project, Lake Simcoe Tourism Area Assessment



A 2013 study, conducted on behalf of RTO 7 by TNS Consumer Insight Research, emphasizes the perception of BruceGreySimcoe as an outdoor destination. Visitors identified the area as a location for 'enjoying trails', 'a great venue for outdoor activities', 'impressive scenery and landscapes', 'great for paddling and canoeing', and 'a great place to rest and rejuvenate'. We identify within the best bet opportunities section of this report, how we envision the region as building on its existing outdoor assets.

While outdoor activities are a certain draw for visitors to the region, visitor surveys conducted by the City of Orillia indicate that past visitors have primarily visited the city to enjoy Casino Rama (36%),

visit friends or family (18%), or attend an event (15%) (City of Orillia, 2013). This highlights the importance of Orillia as an urban core within the region, with a distinct character as a tourism destination. The best bet opportunities of this report identify the expanded role that Orillia can play in the region's tourism industry.

3.1.3. Conclusions and Implications

The preceding review of visitation statistics for Simcoe County, and findings from previous relevant reports identify the following trends:

- Visitation to Simcoe County is relatively local in origin, with the majority of visitors travelling from either within the County (more than 40km), or from the Greater Toronto Area.
- In recent years the number of day visitors to Simcoe County has grown slightly, however overnight visitation remains relatively flat.
- The majority of overnight visitors to Simcoe County choose to stay in private accommodation – homes and cottages, rather than commercial accommodations such as hotels and motels.
- Visitation to Simcoe County is strongest during the winter and summer seasons (the latter being the strongest season), with the shoulder seasons receiving fewer visitors.
- Visitors to Simcoe County participate in a broad variety of activities, however there is a clear preference for outdoor activities including skiing/snowboarding, boating, fishing and golfing.
- Visitors to the region strongly identify the area as a haven for outdoor activities, centred around Simcoe County's lakes, hills, and trails.

- The area is making a name for itself as a hub for both sports tourism, particularly in the field of winter sports, and music festivals focused around Burls Creek.

The implications of these trends indicate that there is opportunity for the region to grow its offer of those tourism assets that currently attract strong visitation to Simcoe County. Based on the asset inventory developed in Phase 1, this includes:

- Outdoor activities including water-based activities (fishing, canoe/kayak, boating);
- Winter sports – both competitive and for leisure (downhill skiing, snow shoe trails, snowmobiling);
- Small town retail; and
- Cycling (both road and off-road).

The specific recommendations as to best bet opportunities in this regard are provided later in this report.



4: Identifying Best Bets

4 Identifying Best Bets

Based on the existing inventory of the region's tourism assets, a key goal of the TAM project is to identify best bet opportunity for future investment and asset development. These best bets must be based on the region's current strengths. This section identifies the region's current strengths, and criteria moving forward to identify best bet opportunities for future investment in tourism assets.

4.1. Our Current Strengths

As identified in the previous section, the region excels as a tourism destination for outdoor recreation opportunities, music, competitive sports, and gaming. Specifically, key current strengths and anchor assets comprise:



4.2. Criteria for Identifying Best Bets

4.2.1. Aligning with Relevant Growth Markets

The project identifies a series of criteria for assessing best bet opportunities for tourism investment in the region (outlined below). Of particular importance, is that opportunities are assessed based on their ability to contribute to the existing strengths of the region as a tourism destination. The region has worked hard to successfully position itself as a central destination for year-round outdoor recreation, complemented by small town retail and wellness opportunities, and local culinary options. It is important not to re-invent the wheel but rather work to enhance the assets the region naturally possesses.

In identifying best bet opportunities it is also important to ensure that these opportunities are aligned with relevant growth markets. Based on our assessment of the region's assets and visitation profile, relevant growth markets comprise:

- 1. Adventure Tourism:** Leisure activities that take place in an unusual, remote, or wilderness destination. This can involve exploring geologically significant locations, and/or rural areas with distinct attraction by residents of urban communities. Adventure tourism typically involves activities that exhibit, or perceive to exhibit, higher risk activities such as rock climbing, but can extend to lower risk and impact activities focused on appreciation of nature and the outdoors (e.g. cycling, kayak/canoe touring etc.).
- 2. Agri-Tourism:** Traditionally this term described attracting visitors to agricultural operations, however can also include the promotion of more urban forms of agri-tourism such as farmers markets, and restaurants offering menus that showcase locally grown ingredients (overlap with gastronomic tourism below).
- 3. Gastronomic Tourism:** The pursuit of unique and memorable eating and drinking experiences. This may include local experiences and/or other unique culinary experiences.

4. **Sharing Economy:** The sharing economy pertains to individuals proposing to share temporarily with tourists what they own (e.g. house, or car), or what they do (such as meals or excursions). Examples of infrastructure that supports the sharing economy include Air BnB (accommodations), and Uber (transportation).
5. **Wellbeing/Wellness:** This refers to tourism for the purpose of promoting health and well-being through physical, psychological or spiritual activities. Wellbeing and wellness tourism can take place in day- or resort spas, for example. A more recent trend in wellbeing and wellness tourism is retreats focused on healthy living and eating.
6. **Cultural and Creative Tourism:** Visitors are increasingly sophisticated in their pursuit of authentic cultural experiences with a strong connection to place. Visitors wish to be involved in the creative process, personally experiencing and participating in cultural and artistic pursuits that are specific to the destination.

4.2.2. Recommended Criteria for Assessing Best Bet Opportunities

The graphic below identifies the recommended criteria for assessing best bet tourism opportunities for the region. These criteria are not mutually exclusive, and the relative weight of each of the criteria will vary project to project. Each criterion is described below the graphic.

- 1 • Builds on competitive advantages for the region
- 2 • On trend with growth markets
- 3 • Builds on regional strengths and key assets
- 4 • Leverages from adjacent destination strengths, weaknesses and strategic directions
- 5 • Contribution to critical mass – investors are not typically pioneers
- 6 • Adequate supporting infrastructure
- 7 • Ties together with (supportive of) other development directions
- 8 • Felt to be an opportunity that the region can own

The following section further describes each of the identified best bet criteria, and their relevance to the region's existing tourism asset inventory. Given that these criteria are not mutually exclusive, but rather complement each other, some are elaborated upon collectively. For reference, the criteria being described in the following section are each identified in a box above the descriptive text.

Best Bet Criteria:

(#1) Builds on competitive advantages for the region

(#3) Builds on regional key strengths and assets

(#5) Contribution to critical mass – investors are not typically pioneers

(#8) Felt to be an opportunity that the region can own

Based on our review of OLC's existing inventory of tourism assets, an analysis of neighbouring regions, and analysis of growth markets relevant to OLC, we identify the following as competitive advantages for the region:

- Year-round draws;
- Extensive lakes, rivers and waterfronts;
- Proximity to the GTA market;
- Strong anchor attractions (winter and summer resorts, Casino Rama, Trent Severn Waterway, Hardwood Ski & Bike, Orillia, Mount St. Louis, Horseshoe Valley);

- Straddling the land between: The land between is the region between the Canadian Shield and Lowlands, stretching across south-central Ontario from Georgian Bay to the Frontenac Arch. The landscape is less rugged than the near-north, but not as flat and arable as the south. It has an abundance of glittering lakes, rivers, and wetlands between open granite ridges and limestone plains. It is an ecotone – a region between two ecosystems. OLC falls within ‘the land between’. While other communities fall within this region, none have taken ownership of this identify, and as such is a potential competitive advantage for OLC – an opportunity the region can **own**.

OLC, its constituent municipalities, RTO 7, and other stakeholders have invested significant time and resources in establishing the region as a tourism destination. Consumer insight research conducted by RTO 7 indicates that the region is recognized by potential visitors as a strong destination for enjoying trails, outdoor activities, scenery and landscapes, paddling and canoeing, and a place to rest and rejuvenate (2013 TNS Consumer Insight Research). Accordingly, any potential opportunity for tourism development should ideally contribute to this critical mass of assets.

Best Bet Criteria:

(#2) On Trend with Growth Markets

Relevant growth markets applicable to tourism in the region were provided in the preceding section. Investment in the development of tourism assets should be assessed based on their alignment with current and projected growth markets in the industry.

Best Bet Criteria:**(#4) Leverages from adjacent destination strengths, weaknesses and strategic directions**

The region is bordered by strong destinations, including the Muskoka 'cottage country' brand, Collingwood's Blue Mountains, and the Kawartha Lakes. Potential tourism investment opportunities should leverage the position of OLC as a part of the near north's cottage identity, but look to differentiate itself within this identity based on its tourism asset offer. While realistically each destination competes for visitors, it is important to remember that all destinations benefit when there is cooperation between adjacent destinations in the region.

Best Bet Criteria:**(#6) Adequate Supporting Infrastructure**

Any tourism investment opportunity must be considered in the context of whether adequate supporting infrastructure exists. This includes accommodations, food and beverage, and other hospitality services. While the asset inventory developed for this project does not serve this purpose (outside scope), both Simcoe County and Ontario's Lake Country have fulsome business directories/inventories that could potentially be leveraged for this purpose.

Best Bet Criteria:**(#7) Ties together with (supportive of) other development directions**

RTO 7, Ontario's Lake Country, and the region's constituent municipalities, all have existing strategic development directions that they are working on. For example, OLC has been working on growing the region's paddling and canoeing industry. Potential tourism investment opportunities should be prioritized based on their fit with the existing development directions that stakeholders within the region are working on.



5: Best Bet Opportunities & Next Steps

5 Best Bet Opportunities and Next Steps

5.1. Best Bet Opportunities:

Based on the preceding analysis, this project identifies the following as best bet opportunities for tourism investment and development for the region. These are identified in this section. The subsequent section then identifies the suggested actions and timing associated with these opportunities.

1. Cultural and Creative Tourism (including Aboriginal cultural tourism)

Creative tourism is tourism which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken. It is travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage or special character of a place, and it provides a connection with those who reside in this place, and create this living culture.

Increasingly cultural activities and facilities such as performing arts centres, museums or art in the built environment are recognized, as strong anchors for mixed-use developments helping to provide identity and prestigious image that money cannot buy. These facilities and activities may be a part of planned cultural districts, and downtown heritage districts, for example.

The region has a number of assets to build on in the realm of cultural and creative tourism. Specifically:

- **Downtown Orillia:** A critical mass of art galleries and museums, in addition to the historic downtown district.
- **Rama First Nation:** There is significant potential to harness the authentic culture and heritage of the Rama First Nation.

Best Practice Examples & Learning Opportunities:

a. Wendake, Quebec

Wendake, Quebec is the current name for the Huron-Wendat reserve, outside of Quebec City. The community has positioned itself as a cultural tourism destination showcasing their culture and traditions. Of particular note is the significant investment in supporting infrastructure that the community has made to support tourism development. Specifically, the community invested in a hotel attached to the Huron-Wendat Museum with traditional architecture. The community also houses the following amenities:

- Historic Old Wendake – restored and showcased for visitors
- Onhoüa Cheteke Traditional Huron Site (authentic reconstruction of a Huron Village)
- Additional lodging - longhouse
- Restaurants
- Myths & Legends tour
- Traditional jewelry workshop
- Crafts & other retail stores
- Spa
- Snowmobile & snowshoe rental and tours
- Pow Wow

The community has worked to develop a broad range of cultural experiences on-site that are supported by complementary activities that appeal to a broad audience. This positions the community as a well-rounded tourism destination with a specific identity that also offers activities with broader appeal that support over-night visitation.

Images: Top : Hôtel-Musée Premières Nations, Middle : Myths & Legends Tour, Bottom : NEK8ARRE Restaurant



b. Portland Creative Service Industry

The City of Portland, Oregon has a strong creative industries sector that has been nurtured through public policy. The phrase 'creative industries' refers to a set of related industries focusing on creating music, books, film/video, theatre, fashion, software and games.

To encourage the development of a strong creative industries sector that both generates jobs in-situ, and stimulates tourism development, the City of Oregon formed the Oregon Arts Commission. Key initiatives that the commission is working to complete, to encourage the development of a strong creative service industry that supports the development of creative and cultural tourism, include:

- Develop and execute a brand strategy for promoting the region's creative industries resources nationally and internationally;
- Develop creative industries economic baseline data to assist in advocacy efforts;
- Continue to build the base by organizing the creative industries cluster across the various vertical profession components of the creative economy ecosystem;
- Create programming for industry-led practicum and internship opportunities for students to develop an interest in careers in the creative services industry. Give firms a first look at emerging young talent and encourage a continuous stream of potential employees; and
- Encourage new funding for collaboration between high school and community colleges and creative community programs to develop integrated learning on a variety of creative subjects.

c. Artscape Toronto

Artscape Toronto is a non-profit organization that brings creative stakeholders together in real estate projects that serve the needs of the arts and cultural community. Since its beginning in 1986, Artscape has become recognized as an international leader in creative placemaking: A practice that leverages the power of art, culture, and creativity to develop creative spaces in communities.

Throughout its history, Artscape has developed and managed 10 unique cultural facilities that have contributed to the development of a creative hub in downtown Toronto. These spaces contribute to the urban fabric of the city through providing well designed and architecturally significant buildings. However, perhaps more importantly, they provide spaces in which local artists can develop to facilitate their contribution to the local creative economy. Examples like the Artscape Wychwood Barns are a key example of a successful investment in real estate for artists that then come together to create a hub of creativity and artistic endeavours that attract visitors from across, and outside, of the city.

Non-profit organizations like Artscape to support local artists are integral to the development of a strong creative and cultural tourism sector through helping to nurture local talent in place. This is of particular importance in smaller communities that may lack the opportunities and avenues that exist for artists and creative workers in larger cities.

Images: Top: Artscape Youngplace (Toronto), Bottom: Artscape Wychwood Barns (Toronto)



2. Soft Adventure

The term 'soft adventure' typically describes the type of adventure tourism that requires little or no experience, and is low risk. Accordingly, it appeals to a broader audience than more specialized adventure tourism which requires greater levels of skill, greater risk, and requires a more significant prior investment of both time and money in skill acquisition.

The specific area of soft adventure tourism that has the most potential for OLC moving forward, is road/trail cycling, mountain biking, and silent watercraft sports like kayak/canoeing, and paddle boarding. Soft adventure can be used as a means to enhance the viability of existing resorts and campgrounds. There is also an opportunity to add new experiences along the Trent Severn Waterway, such as European-style river boating.

Earlier in this report, we identified criteria for prioritizing the development of new tourism opportunities in OLC. A key criterion was that the initiative tie together with (or be supportive of) other development and strategic directions in the region. In this regard, investment in tourism development in soft adventure should be a priority given the work that OLC has recently undertaken in the development of paddling trails and growing this as a key tourism product offer for the region. This report suggests that OLC should build on this initiative, in addition to supporting development that complements this work in the area of silent watercraft sports, cycling and biking.

The region has a number of assets to build on in the realm of soft adventure tourism. Specifically:

- The synergy that exists between Horseshoe Valley and the Copeland Forest;
- Hardwood Ski and Bike; and
- The Trent-Severn Waterway.

Best Practice Examples & Learning Opportunities:

a. Cycling: La Route Verte, Quebec

Road cycling is a significant growth market for tourism product development across Canada. There is opportunity to develop product for both the more professional road cyclists looking for well-planned routes that connect with neighbouring communities (see the criteria for best bet opportunities in terms of leveraging from adjacent destination strengths), but also product for more amateur cyclists that wish to use cycling as a way to experience authentic culinary and nature-based activities within the region.

The key to encouraging cycle tourism is the development of well-planned, signed, and mapped cycle routes with connections to adjacent destinations. A key case study in this regard is La Route Verte (translation: the green road/route) in Quebec. It is a non-profit initiative that manages the mapping and promotion of cycle routes across Quebec. The initiative highlights more than 4,000km along carefully selected rights-of-way and rural roads.

Given regional variations and the broad range of development opportunities, La Route Verte is expanded in a number of different ways:

- By using public right-of-ways (abandoned rail corridors, towpaths, hydroelectric right-of-ways);
- By paving shoulders to make roads safer for cyclists; and
- By identifying certain rural roads with little traffic as “designated cycling routes.”

Giving La Route Verte a distinct identity helps improve coordination between municipalities and communities. Moreover, it has become a one-stop-shop for potential visitors to find information on cycle routes across Quebec. The organization's website has strong multi-purpose functionality, allowing visitors to plan their route, create an itinerary, identify accommodation, and other complementary attractions along the route. The website can be accessed through:

<http://www.routeverte.com/e/>



WELCOME ON LA ROUTE VERTE



b. Whistler Mountain Bike Park

Whistler Mountain Bike Park is a part of the Whistler Blackcomb Resort north of Vancouver in B.C. The resort is the largest ski resort in Canada with a long history, however the mountain bike park was developed in 1998 as a way to utilize the resort in the off-season.

The mountain bike park uses the ski hill chairlifts in the summer to bring visitors up to a variety of trails. The trails were created using a combination of the existing ski hills, and new trail development in the surrounding forest. The development of the bike park allows the resort to operate year-round, benefitting the accommodations, food and beverage, and other services offered on site.

Given the calibre of the facility, the Whistler Mountain Bike Park attracts world-class mountain biking events, in addition to hosting provincial and local sport tourism tournaments. It also functions as a key facility for the development of local athletes.

There is opportunity for similar investment in the region's ski resorts to extend their utilization year-round, and further investment in the region's existing bike park(s) to grow visitation and the number (and scale) of sport tourism events. Examples of existing infrastructure with potential for leverage in this regard are Hardwood Ski and Bike, Horseshoe Valley, and Mount St. Louis.



3. Wellness Tourism

As identified in the previous section, the experiences sought by wellness travelers include, but are not limited to, spas, fitness, yoga, and spiritual experiences, in addition to healthy hotels/resorts, preventative medical, parks and nature preserves, and local organic foods and cuisine. The research shows these travelers are looking for travel experiences featuring healthy living, meaning and connection, authenticity, and activities that prevent disease and proactive maintenance and improvement of health and well-being.

We suggest that the best bet opportunities for OLC exist where the region has a competitive strength, and where wellness products and experience can enhance the viability of existing resorts and campgrounds.

The following exhibit indicates the importance of wellness tourism as a component within the global tourism industry. In 2010, it is estimated by SRI International that wellness tourism accounted for a total of \$439 billion in worldwide spending. This exceeds the spending associated with other forms of tourism that are typically more frequently recognized by communities as best bets, such as sport tourism, culinary tourism, and eco-tourism.

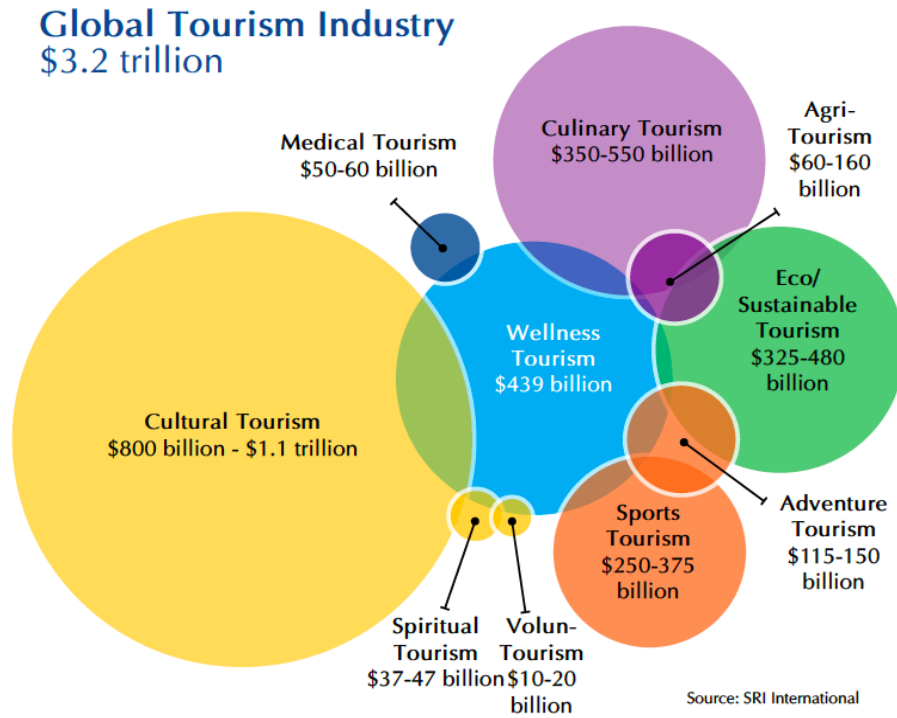


Figure 7: Global Tourism Industry - The Figures (2010)

Source: SRI International

The region has a number of assets to build on in the realm of wellness tourism. Specifically:

- Existing resorts such as Fern Resort, and Horseshoe Valley: These resorts can develop programming more in-tune with local culinary options and healthy living spas/camps; and
- The natural environments in proximity to retail and other amenities such as Lake Couchiching and Bass Lake: These environments are prime locations for wellness retreats that capitalize on the calm and serenity of the region, but allow visitors the luxury of staying in proximity to urban amenities and authentic small town experiences.

Best Practice Examples & Learning Opportunities:

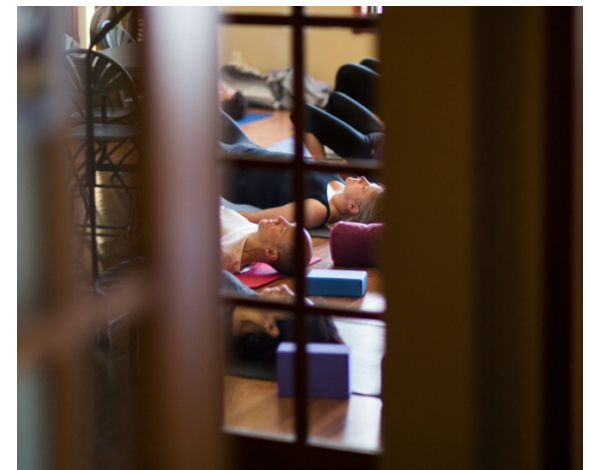
a. Grail Springs Wellness Retreat, ON

Located half way between Toronto and Ottawa, in Bancroft, the Grail Springs Wellness Retreat has taken an older rural property and transformed it into a one-stop shop wellness treat. The property offers visitors an opportunity to experience rural Ontario living, and its associated outdoor adventures such as paddling, hiking, lake swimming, and trail walking, while simultaneously participating in health and wellness activities.

The resort offers:

- Scheduled spa and wellness activities;
- Speaker series;
- Yoga and Meditation;
- Hikes; and
- Spa therapies.

There is a real opportunity for the region to benefit from this form of investment, particularly through the redevelopment/reuse of properties on the many lakes and waterfronts that the region boasts. The focus of this redevelopment must be on the combination of rural outdoor activities, with luxury health and wellness treatments.



4. Sports Tourism

Sports tourism is typically defined as travel outside of a participant's usual environment for either passive or active involvement in competitive sport, where sport is the prime motivational reason for travel, and the touristic or leisure element may act to reinforce the overall experience.

The region is blessed with a wide range of natural environments that lend themselves to the development of sports tourism facilities. This includes lakes and rivers for watersports, forests for mountain biking and snow shoeing, and hills/mountains for skiing and mountain biking. Many of these sports are growing industries within sport tourism across North America. As such, OLC is well placed to continue to leverage its competitive advantage in these niches. The opportunity would be to focus on enhancing the viability, sustainability and tourism impact of the region's current sport tourism events, and specifically those events that have a broader regional impact and benefit.

Specific assets that OLC can leverage and continue to direct investment into include:

- Critical mass of competitive winter sport venues: MSL Moonstone, Horseshoe, Hardwood Ski & Bike, Copeland Forest;
 - In 2014 the Horseshoe Valley Resort experienced approximately 20,000 room nights, with 115,000 skier visits, and 35,000 golf rounds.
- Freestyling skiing facilities;
- College/University; and
- Avenues for further expansion – competitive watersports e.g.: marathon kayaking, towed water sports competitions.

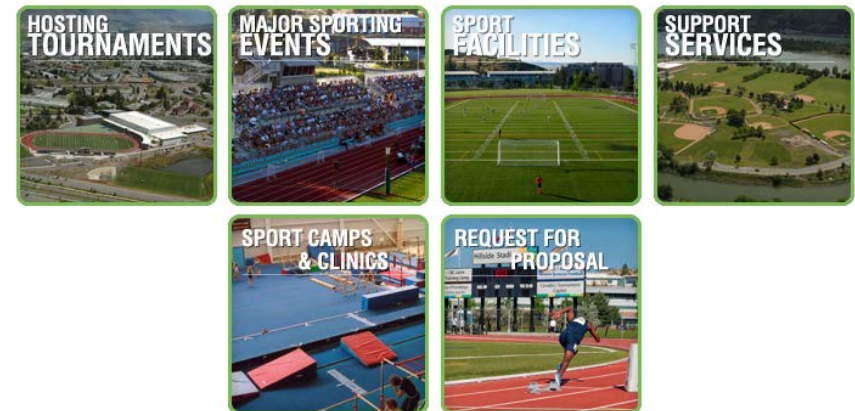
Best Practice Examples & Learning Opportunities:

a. Kamloops, BC

Kamloops in British Columbia has positioned itself as 'Canada's Tournament Capital'. The city hosts more than 1 million people each year for the purposes of sport tourism. The city leverages and markets its existing infrastructure to host multi-sport tournaments. Specific facilities include the Tournament Capital Centre (TCC), Canada Games Aquatic Centre, six public arenas, and Tournament Capital Ranch (TCR) (fields and diamonds).

While the City has benefited from federal and provincial investment in facilities as a part of the Canada Summer Games, the best practice in this regard refers to the effective marketing of the City as a tournament destination, and the cooperation between the City and surrounding communities to leverage existing infrastructure to support this.

OLC has a strong inventory of both indoor and outdoor facilities that support sports tournaments for more traditional sports such as hockey and downhill skiing, in addition to growth industries and alternative sports such as mountain biking.



b. Bear Mountain National Mountain Bike Training Centre

The Bear Mountain Resort Community is a full service resort community that includes lodging and cottaging, resort, spa and conference destinations, in addition to recreational amenities. One of the most recent additions to the resort community is the Bear Mountain National Mountain Bike Training Centre which is Vancouver Island's newest bike park. The existing trails had long been used informally by the community for trail and cross-country riding, however the area was purchased and developed into a formal facility. Existing trails were formalized and further developed by experts in the field, to produce a facility that is now home to the Canadian National Mountain Bike Team.

The region is home to a number of resorts and ski hills that could host this type of facility, however the opportunity lies in the further development and leveraging of existing assets such as Hardwood Ski and Bike, Horseshoe Valley, and surrounding Simcoe County Forest. Further investing in these facilities and building on their critical mass, and marketing these facilities as a central hub for mountain biking and winter sports tournaments should be central to the further investment in OLC to grow sports tourism.



5. Alternative Cottaging and Resort Concepts

The region has a firm competitive advantage over other tourism destinations in its natural landscape. There is a real opportunity for investment in alternative cottaging concepts and resort set-ups that showcase these natural landscapes, and allow visitors to experience more of the natural environment in-place.

Recent trends in alternative cottaging and resort concepts include 'glamping' (a portmanteau of 'glamour' and 'camping' that describes a style of camping with amenities and in some cases resort-style services not usually associated with traditional camping – this opportunity is further explored below), and also alternative concepts like European-style river boating.

A key asset to build upon in this regard is the Trent-Severn Waterway, particularly in the realm of European-style river boating. While it is impossible to count the precise number of visitors to the canal on an annual basis given the free nature of visitation, and the multiple access points between communities, statistics indicate that in 2014/15, approximately 1.9 million visitors visited the Trent-Severn waterway. Accordingly there is certainly an opportunity to build on this popularity. While the waterway previously had houseboats that caused some neighbour concerns, the opportunity as we see it is more in European-style river boating which entails larger boats that take short-duration overnight cruises. This then provides the opportunity for multiple stops along the cruise to benefit local communities.



6. Alternative Camping Concepts

'Glamping' operations have been tried with some success in the region's provincial parks (through yurts and Otentik), but there remains strong opportunity for investment in this form of lodging.

Assets to build on in this regard include:

- Additions to existing camps at provincial parks (McRae Point, Bass Lake);
- The western shores and communities along Lake Couchiching, such as Menoke Beach, Cumberland Beach etc.; and
- Along popular canoe/kayak routes. – This is of particular note given the OLC's current focus on growing paddling and kayaking in the region.

It is important to prioritize alternative camping concepts that provide a well-rounded experience for visitors that encourage multi-night stays. This goes beyond providing simply accommodation, branching out into either the direct provision of, or cross-promotion and facilitation of external providers of outdoor activities. This can include kayak/canoeing, biking, spa/wellness, boating, and cycling.

Best Practice Examples & Learning Opportunities:

a. Long Point Eco-Adventures, Lake Erie

Long Point Eco-Adventures offers a variety of 'glamping' options including 'wilderness pods' - (top image), and 'wilderness suites' which are reminiscent of African safari camping (bottom image). The camp sites are located on a large tract of land bordering Lake Erie. The site is operated by a private operator which also provides visitors with a range of outdoor activities to fill their vacation including:

- Guided eco-retreats;
- Kayaking/Canoeing;
- Kayak fishing;
- Mountain biking;
- Mushroom foray; and
- Boat tours.

The operator works with local businesses to direct visitors to spas and retail excursions in the local area.



b. Outpost Luxury Tented Camping, 90 minutes north of Toronto

Outpost is a small camp (8 tents) accessible only by sea plane approximately 90 minutes north of Toronto. The facility offers a luxury tenting experience that is marketed to urban dwellers in the GTA. The camp has no electricity, and focuses on providing campers with the experience of wilderness without the need for camping or survival skills.

The facility piggybacks off of the growing popularity of authentic culinary tourism to offer visitors chef-prepared meals on-site using locally grown and sourced ingredients.

Given the geography of the region, there are ample opportunities for the development of similar facilities in the region that showcase both OLC's lakes and waterfronts, and local produce and culinary experiences.



7. Small Town Arts/Culture Districts

Industry trends indicate that visitors increasingly travel to seek out authentic and locally-specific experiences. Travellers are increasingly sophisticated in the experiences they seek out and lack interest in 'cookie cutter' restaurants, lodgings and attractions. Key assets to leverage in this regard are authentic small town arts and culture districts that provide visitors with a well-rounded authentic experiences including retail, culinary, festivals and events, and parks and trails. Street art can be used to improve the aesthetic appeal of historic downtown areas, and to provide a cohesive identity to otherwise ordinary main streets.

Creating districts or areas with tourism appeal can be achieved through the renovation of old buildings for adaptive reuse, instituting grants for arts programs, implementing tax incentives, building in below market rent for artists, creating special zoning changes and ensuring building codes allow for work/live space for artists. Community Development Corporations (CDCs) and Business Improvement Areas (BIAs) are key within this process.

The region has several key assets upon which to build in this regard:

- Coldwater;
- Downtown Orillia; and
- Washago.

Discussions with key stakeholders indicate that work to develop Downtown Orillia as a small town arts/culture district is ongoing.

Best Practice Examples & Learning Opportunities:

a. Elora, Ontario

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

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



8. Small Town Waterfront Districts

As highlighted throughout this report, a key competitive advantage that the region can exploit is the abundance of rivers, lakes, and waterfronts across the region. The region is also blessed with a number of downtowns in proximity to waterfronts. Specific assets to build upon in this regard comprise:

- Orillia; and
- Washago

In developing and leveraging small town waterfront districts, a variety of experiences is important including for example art, history, scenery, tourist retail, restaurants, festivals and events and animation. The key to creating a successful small town destination is to ensure that these experiences are effectively bundled under the umbrella of one or two key themes. Niagara Region for example is known for its wine, however in recent years its marketing efforts have increasingly expanded to include more agricultural experiences that offer a combination of natural scenery and high dining. In addition to bundling different varieties of experiences, small town tourism can capitalize on the patchwork of towns, villages and settlement areas in the surrounding area to bundle geographically proximate experiences.

Best Practice Examples & Learning Opportunities:

a. Muskoka Wharf, Gravenhurst

Gravenhurst developed a heritage-based attraction on historic Lake Muskoka in Gravenhurst Bay. The development includes a boardwalk (over 2,000 ft.), and new public trails in the peninsula. These investments both link existing business and recreation facilities (including an upgraded children's playground with splash zone, a baseball diamond, and outdoor skating rink), and have encouraged further development of businesses focused on servicing visitors to the area. The municipality continues to actively promote the site as a focal point for any events organized in the municipality including local art shows, farmers markets, and small-scale musical concerts.



5.2. Next Steps

The best bet opportunities identified within this report will likely be undertaken by private operators, either new or existing in the area. In promoting these opportunities however, there are clear roles for regional stakeholders to pursue. These roles will be specific to the nature of each of the best bet opportunities. Accordingly, the logical next step in the progression of this project will be to form committees or working groups specific to each of the identified best bet opportunities. These working groups should include representation from each of the municipalities, in addition to stakeholders specific to the type of best bet opportunity identified. As an example, the development of glamping and river boat operations will likely require representation from Simcoe County, and Ontario Parks, whereas the development of arts/cultural districts would likely require representation from local BIAs and CDCs.

These working groups should be formed to identify, based on both the inventory compiled within this report, the mapping conducted, and local knowledge, the required next steps in the development of these opportunities. This may entail feasibility studies for specific sites, or more broad based operating proformas for different tourism business opportunities.

Below, categorized by opportunity, we have identified the proposed timing and tasks associated with the development of each identified best bet.

Opportunity	Next Steps		
	Short Term (1-3 years)	Medium Term (4-6 years)	Long Term (7+ years)
Cultural & creative tourism (including Aboriginal tourism)	Support Aboriginal cultural tourism initiatives with Rama.	<p>Pursue & support new creative industry & infrastructure.</p> <p>Encourage municipalities to consider renovation of old buildings for adaptive reuse, instituting grants for arts programs, implementing tax incentives, building in below market rent for artists, creating special zoning changes and ensuring building codes allow for work/live space for artists.</p>	Pursue & support new creative industry & infrastructure.
Soft adventure	Build on the existing cycling & water sports initiatives & monitor/evaluate the results.	Work with the Province (Investment Office) in introducing European operators to the Canal opportunity.	

Opportunity	Next Steps		
	Short Term (1-3 years)	Medium Term (4-6 years)	Long Term (7+ years)
Wellness tourism		Pursue investment attraction strategy to expand wellness tourism offerings.	Pursue investment attraction strategy to expand wellness tourism offerings.
Sports tourism	Build on & coordinate the existing sports tourism initiatives at MLM & HH & HVR (focus on strengths & competitive advantages like mountain biking & freestyle skiing).	Pursue opportunities for provincial or national designations to enhance credibility (i.e. Provincial or Eastern Canada Training Centre for Freestyle Skiing). Ties in other uncommon partners like the College/University.	
Alternative cottaging & resort concepts		Work with & support resort & cottage development owners to diversify as Muskoka is doing.	Work with & support resort & cottage development owners to diversify as Muskoka is doing.

Opportunity	Next Steps		
	Short Term (1-3 years)	Medium Term (4-6 years)	Long Term (7+ years)
Alternative camping concepts	Investigate opportunities to introduce glamping concepts.	Support new alternative camping concepts like glamping that help to broaden tourism appeal to the region.	
Small town arts/cultural districts		Identify towns with potential & encourage municipalities to implement cultural district strategies & animation. Support BIA's. Encourage community improvement plans.	
Small town waterfront districts		Pick one waterfront district to begin with & develop a tourism waterfront plan.	

Opportunity	Next Steps		
	Short Term (1-3 years)	Medium Term (4-6 years)	Long Term (7+ years)
Enhancing tourism appeal of events & festivals	<p>Consider incentives to encourage existing events with tourism appeal to expand market appeal (i.e. marketing resources/support, contributions to measure tourism draw).</p> <p>Should be at least 25% tourist draw to be considered a tourism event.</p>	<p>Pursue new opportunities like creating a summer home for the Toronto Symphony or equivalent.</p>	<p>Identify & plan for new event opportunities like historic milestones to develop one time or recurring events around.</p>

