Acknowledgements

We would like to thank all of the tourism operators, business associations, Town staff, Park staff, developers, residents, regional tourism stakeholders and others who provided generously of their time and input to assist in the development of this Strategic Tourism Plan. This project was in part made possible through funding support from the Ministry of Tourism.

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# Table of Contents

1. **Executive Summary** .............................................................................................................. 1  

2. **Introduction** ................................................................................................................... 9  
   2.1 Assignment Objectives ........................................................................................................ 9  
   2.2 Approach and Methodology ............................................................................................. 10  
   2.3 Review of Past Reports ..................................................................................................... 11  
   2.4 Development Context ....................................................................................................... 13  
      2.4.1 Regional Population Growth Forecast ............................................................................. 13  
      2.4.2 Recent Residential Development Activity ..................................................................... 14  
      2.4.3 Supply of Available Development Land ...................................................................... 16  

3. **Wasaga Beach Tourism Product** .......................................................................................... 17  
   3.1 Regional Context ............................................................................................................. 17  
   3.2 The Attraction Base ......................................................................................................... 20  
      3.2.1 Attractions ................................................................................................................... 20  
      3.2.2 Festivals and Events .................................................................................................... 21  
   3.3 Accommodation Inventory ............................................................................................... 22  
   3.4 Supporting Infrastructure ................................................................................................. 25  
      3.4.1 Food and Beverage Services ....................................................................................... 25  
      3.4.2 Recreation and Culture Facilities ................................................................................ 25  
      3.4.3 Transportation Infrastructure .................................................................................... 26  
   3.5 Environmental Factors ..................................................................................................... 28  
   3.6 Development Proposals with Significant Tourism Components ................................... 29  

4. **Market Demand** ................................................................................................................. 31  
   4.1 National and Provincial Context ...................................................................................... 31  
   4.2 Relevant Market Trends .................................................................................................... 31  
   4.3 Existing/Past Visitation Patterns ...................................................................................... 36  
   4.4 Primary Research Results ............................................................................................... 41  
   4.5 Potential Markets – Opportunities .................................................................................. 49
1. Executive Summary

In May 2007 the Tourism Company, working in association with IBI Group, was retained by the Town of Wasaga Beach to prepare a Strategic Tourism Plan to assist the Town in becoming more proactive in growing the tourism sector. The overall objective of the assignment was to “develop a strategic tourism plan that articulates a vision, values, broad goals and objectives, strategic priorities and actions, defined outcomes, forward planning and mechanisms for implementation.”

The work was completed over a 4 month period (June through September) following a work plan encompassing the following 5 phases:

1. Collection and review of all relevant background materials including past tourism studies/assessments.
2. Evaluation of the tourism products in Wasaga Beach – assessment of the core attractors, secondary attractions and supporting infrastructure.
3. Market analysis – the existing visitation to Wasaga Beach and future market opportunities.
4. Opportunities and gaps – evaluating the match between future target markets and the existing product.
5. Strategy development – a blueprint for tourism in Wasaga Beach.

Extensive consultation was an integral part of the approach and included the following:
- Client working sessions
- A public meeting
- An online discussion forum
- Solicitation of briefs to be submitted by email, fax or mail
- An industry workshop
- An industry visioning session
- Session with Mayor and Council
- Over 20 depth interviews with key stakeholders and group meetings
- Visitor intercept survey and license plate survey

The Existing Product

Wasaga Beach is a highly seasonal resort community with significant potential. It is very much an ‘economy destination’ in both perception and reality. Tourism has been for many years, and will continue to be a cornerstone of the economy in Wasaga Beach, and must be taken seriously by the business community, the community leaders and the local residents. As noted there are a number of significant hurdles and deficiencies to growing the tourism sector in any significant way, that will require bold thinking and action by the Town.
• Major attractions in the community need to be diversified to draw visitors in the shoulder seasons and provide more opportunities to keep visitors engaged during inclement weather;
• Existing and new festivals and events can be used to help extend the tourism season. The War of 1812 anniversary beginning in 2012 provides a significant opportunity to increase awareness and visitation, and could result in important legacies for Wasaga Beach, but must be planned within the context of the Strategic Tourism priorities;
• The accommodation plant (roofed and camping) needs to be upgraded, expanded and diversified to provide higher quality options;
• Food services need to be diversified providing a greater range and quality level of food and beverage options for visitors;
• Transportation into and around Wasaga Beach must be a priority to fix current bottlenecks and provide alternative options to the car.

Wasaga Beach is on the verge of an exciting transition into the future with a range of private sector development interests showing vision and commitment to invest in tourism. Ontario Parks, by virtue of their role as stewards of the beach and intact dune areas will need to play a major role. Some of the legacies in the community from weak urban design and planning in the past will take time to correct. The consultants recognize there are certain constraints that cannot be fully overcome in the short term – that require capital-intensive long-term planning – but this is a fact of life in most historic resort towns.

The Markets
There is little in the way of accurate statistics on tourism visitation to Wasaga Beach other than the Provincial Park annual day use number counts. Using these statistics as a base number the Town estimates total visitation to Wasaga Beach in 2006 was approximately 2 million visitors. The tourism visitation statistics compiled annually by Statistics Canada is only accurate down to a Census District level, which for Wasaga Beach means Simcoe County. There is no way to determine the proportion of the 6.9 million visitors to Simcoe County (2004) that can be attributed to Wasaga Beach. To provide some insight into the current visitor markets in Wasaga Beach the consulting team conducted a beach intercept survey and a license plate survey in the beach parking lots. The summary of the findings is presented in the main body of the report and more detailed findings are contained in a separate appendix document. Some of the key findings are summarized below:
• The majority of visitors were from the GTA (41.7%) followed by central Ontario and then SW Ontario;
• Quebec visitors accounted for close to 10% of total visitors and 20% of overnight visitors, while US visitors accounted for only 1% of total visitors;
• 42% of all visitors stayed overnight with the vast majority staying in Wasaga Beach – of the 17% not staying in Wasaga the majority were staying in Collingwood/Blue Mountains;
A large proportion of visitors would like to see more beach facilities and amenities, a cleaner beach, and more quality food and beverage options – a significant proportion of overnight visitors would like to see more quality accommodation options.

Secondary research sources such as the TAMS database clearly identifies the beach goer market as a large and growing segment of the total US and Canadian markets. Based on the research it is evident that Wasaga Beach could provide more diversity of supporting activities (i.e. local cuisine restaurants, shops for arts and crafts, outdoor cafes, book or movie stores and movie theatres) to better cater to this market segment and attract more, or a greater proportion of overnight beach goers. To get over the seasonality of the beach recreation months, Wasaga Beach could develop other highly popular activity attractions such as a casino, amusement park, lakeside resort, live theatre or a water theme park, major heritage attraction to name a few. There are many smaller market niches that Wasaga could pursue with appropriate product and service development such as motorcycle touring, bicycle touring, motorcoach tours, and golf packages.

**Key Issues**
Based on the input from the consultation program combined with their own professional assessment the consulting team have identified the most critical issues that need to be addressed with the tourism strategy. The 9 most important issues facing Wasaga Beach tourism are listed below.

1. **Seasonality**
The existing tourism sector is highly seasonal, focused around the summer beach season and school summer holidays. A highly seasonal industry is a major issue creating a very inefficient business climate in terms of asset utilization and return on investment (ROI) for the private sector, and posing crowding and capacity problems.

2. **Lack of Alternative Attractions**
The beach is the main attractor and most supporting attractions are outdoors oriented. There is significant gap in the provision of indoor entertainment and attractions suitable for inclement weather and year round tourist draw.

3. **Transportation**
Transportation into and around the community is a major issue. Given the linear nature of the town and the beach there is no easy solution. Wasaga is off the main highway and is not a primary commercial centre within the region, and yet it does receive pass through traffic around the Bay creating further congestion. There is a significant gap in provision of alternative transportation opportunities within the community.

4. **Quality of Infrastructure**
There are significant gaps in the provision of a quality range of accommodation and food service options for visitors.
5. **Town’s Image**
There are fears that the lingering ‘party town’ image is continuing to hinder Wasaga Beach.

6. **Residents vs. Tourism**
With a growing population there is evidence of growing conflict between the local community and tourists. Yet, population growth and its attendant development of services should provide additional capacity to meet the needs of tourists as well.

7. **Good vs. Bad Development**
There are many new developments in the planning stages. Several are large-scale tourism developments and others have significant tourism components. How can the town screen appropriate versus inappropriate development?

8. **Political Collaboration**
Tourists do not look at political boundaries – they are looking for an experience in a destination area. Current collaborative initiatives between communities around the Bay should be continued.

9. **Sustainable Development**
The provincial park is looked upon by some as a hindrance to tourism and development. But the reality is the Park provides credibility to tourists and ensures the conservation of the beach environment that is attracting tourists in the first place. Sustainable development is ‘meeting the needs of the present without compromising the ability of future generations to meet their needs’.

Each of these issues must be addressed and mitigated in future.

**A Vision for Wasaga Beach Tourism**
The vision statement is intended to be the community’s vision for tourism looking out 10-20 years. The vision statement will help to guide the community tourism strategy. The following is a recommended vision statement to work with. The key elements of the vision are:

- A viable multi-season tourism industry;
- Attracting domestic and international visitors for a range of unique experiences in different seasons;
- Sustainable beach, dune, and bay ecosystem; and
- Working together with adjacent destinations including Collingwood and the Blue Mountains.

*Wasaga Beach is an international, multi-season resort destination stretching along the world’s longest freshwater beach and dune ecosystem, situated on the pristine shores of spectacular Georgian Bay with*
the beautiful Blue Mountains as a backdrop. The community and surrounding area offers a wide range of unique visitor experiences for all ages to enjoy including opportunities to explore the area’s rich natural and cultural heritage.

The Mission Statement
Wasaga Beach will focus on expanding the seasonality of the tourism sector to create a healthier business climate. New attractions and experiences with substantial shoulder season appeal will be encouraged and developed to support the upgrading and expansion of the accommodation and food service plant.

Tourism Strategy Objectives
Strategic Objectives represent a series of targets by which the Town of Wasaga Beach can move toward the achievement of the Tourism Vision. The principal objectives to direct the strategy are as follows:

A: Make Wasaga’s Tourism Product Multi-Season/Multi-Market
• Focus on increasing visitor yield rather than numbers – a greater proportion of overnight visitors staying longer;
• Diversify attractions to extend tourism season – entertainment, cultural, interpretive opportunities
• Diversify markets, both in terms of tourism product (activity) and geographic sources of demand, both in Ontario, Quebec, US and beyond; and
• Diversification of the tourism product will require capacity building and an identification of a range of incremental tourism additions which collectively can improve the range of experiences and extend the tourism season beyond the summer months. These additions can include the development of sport tourism, as well as a greater emphasis on historic, arts and culture tourism opportunities in the broader region.

B: Mobilize the full potential of Wasaga Beach Provincial Park
• The Provincial Park itself is the single most significant resource underpinning the tourism potential of the Town. There is a pressing need to better utilize the natural resources for tourism benefit – beach, river, dunes, Park, while at the same time protecting the integrity of the natural resources.

C: Municipal Management/Partnerships
• More effective partnership with Ontario Parks to identify joint resources for implementing improvements to the beach experience for visitors;
• Beautification of the Town (plan, funding and incentives);
• Become more business friendly and proactive to entice investment;
• Improve access to and within the town for visitors – focus on alternative transport approaches; and
• Greater enforcement of standards.

D: Growth Management and Provision of Tourism Infrastructure

• Balancing the needs of residents and tourists;
• Promoting residential growth and the provision of community services/building critical mass of year-round services and commerce; and
• Leveraging investment interest to include improvements to tourism infrastructure.

The Strategic Directions

A total of 11 strategic directions are detailed in the main body of the report and summarized briefly below (not in any order or priority):

1. The Town needs to re-position its image and re-brand itself in the marketplace but this will require product enhancements including further community beautification and upgrading the accommodation plant. A true destination brand is based on a promise to the potential visitor about the distinctive and relevant experience they can anticipate. The experience that Wasaga currently offers is dated and needs to be made more relevant to today’s tourist needs and expectations.

2. It is recommended that the Town and Ontario Parks move from a numbered beach system to a themed or nodal beach format to more effectively market the match between the different beaches and their appropriate user groups.

3. A more effective directional wayfinding system needs to be implemented to enable visitors to travel more directly to their chosen destination or beach within the Town. This can help to mitigate some of the current congestion problems.

4. The Town, as part of its review and update of the Official Plan, conduct an assessment of the strategic value of its existing lands designated Tourist Commercial, Tourist Accommodation, Recreational Commercial and District Commercial. Tourism as a key sector, necessitates that existing designated land be provided additional protection within the Official Plan to limit instances of re-designation to other uses.

5. The Town needs to become more proactive to seek appropriate tourism investment with strategic application of incentives such as designation of community improvement project areas and application of property improvement grants or loans and/or tax equivalent grants, municipal fee reductions and waivers.
6. Transportation is a big issue for Wasaga beach and needs serious attention including provision for alternative forms of transportation other than cars.

7. Wasaga Beach tourism will always rely on the unique natural resources including the beach and dune ecosystem, the river and the bay. These resources must be managed in a sustainable manner always protecting the ecological integrity.

8. The Town needs to become more rigorous in the review and analysis of development proposals. A framework for analyzing proposals is detailed in the main body of the report.

9. Ontario Parks will need to be a major contributing partner in the future development of tourism in Wasaga. A number of recommendations are contained in the main body of the report for consideration by Ontario Parks in association with the Town including the addition of a new/enhanced visitor interpretive and orientation facility, a provincial park quality RV campground, extension of the boardwalk and incorporation of multi-use trails, allowance of more beach concessions and facilities/services, upgrading beach infrastructure and beach lifeguards.

10. The Town should develop an event tourism strategy and more proactively support or solicit events with tourism impact.

11. Economic Development should begin to consider adding a local marketing strategy and plan into the Town’s tourism marketing program.

Summary
All of the recommendations and strategic directions contained in this report will require significant commitment from the various partners (Town, Ontario Parks, the tourism sector, community) and time. To give the strategy credibility and to signal the Town’s leadership commitment it is recommended that the Council adopt the strategy as the guiding document for growing a healthy tourism sector in Wasaga Beach.

Tourism is important for Wasaga Beach and the surrounding region. Preliminary economic impact modelling based on an estimated 960,000 annual overnight visitors (46% of the estimated 2 million annual visitors) would suggest a total economic impact to the local and regional economy of between $80 - $105 million in direct, indirect and induced spending. This results in an approximate total of 890 jobs and 24.6 million in tax revenues to the federal, provincial and municipal governments in Simcoe County.
To compete in an increasingly competitive tourism market Wasaga Beach must become pro-active in pursuing tourism investment, diversify and upgrade the tourism product/experience, and become recognized leaders in strategic tourism marketing.
2. Introduction

2.1 Assignment Objectives

For years Wasaga Beach has been a prominent summer vacation destination close to the GTA markets, attracting close to 2 million visitors annually. Wasaga Beach is a major anchor at the bottom end of Georgian Bay one of the most pristine and accessible (based on proximity to the GTA) bodies of fresh water in the Great Lakes system. With 14 km of beautiful sand beach, associated dune system and extensive adjacent parklands Wasaga has become somewhat of an icon for Ontarians for summer fun. Over the last 20 years the Town of Wasaga Beach has aggressively improved community services leading to a development boom that has made Wasaga one of the fastest growing residential communities in Ontario. Wasaga lies just east of the Blue Mountain resort area an area that has seen rapid growth as a four season destination based largely on some of the best alpine skiing in the province. The combination of the Niagara Escarpment, beach and Georgian Bay lends itself to tourism (domestic and international) as well as becoming an increasingly desirable area to live, work and retire.

In 2001 Wasaga Beach was part of the broader southern Georgian Bay region (extending from Owen Sound to Waubashene) that underwent the Premier Ranked Destination evaluation process. This analysis concluded that southern Georgian Bay is indeed among Ontario’s premier ranked tourism destination areas with potential to become a pre-eminent resort destination. The analysis also pointed out some of the key deficiencies of the region including a lack of weatherproof attractions and shoulder season appeal and a lack of diversity of accommodation plant specifically a gap in higher end accommodation options. These deficiencies are particularly relevant for Wasaga Beach where there is such a strong reliance on summer products and experiences. As one of three natural destinations within the southern Georgian Bay region it was pointed out that Wasaga Beach needed to develop their own long-term tourism strategy to help guide the industry and community in achieving the desired directions and objectives. Within the last year the Town has also seen an increase in development proposals with a strong tourism element including a proposed major redevelopment of the Main Beach area. The Town recognized the need to be able to respond to the proposals in a proactive manner, another important reason to prepare a Strategic Tourism Plan.

The overall objective of the assignment was to “develop a strategic tourism plan that will articulate a vision, values, broad goals and objectives, strategic priorities and actions, defined outcomes, forward planning and mechanisms for implementation.” The more specific objectives of the assignment as laid out in the terms of reference were as follows:
• Identify business investment opportunities to expand the year round tourism potential of Wasaga Beach;
• Identify financial and other investment requirements and potential financial partnerships that will enhance the development of a four season destination in Wasaga Beach;
• Identify all existing and potential tourism attractions and opportunities;
• Determine and understand the profiles of existing and desired visitors;
• Identify opportunities to increase the length of stay of visitors;
• Identify opportunities that lead to increased expenditures of visitors;
• Identify opportunities for market growth;
• Determine visitor needs and/or deficiencies in current accommodations, attractions and services to enhance the quality of visitor experience while appealing to a broader market during an expanded season;
• Build brand awareness as a four-seasons destination; and
• Identify issues of concern to the residents and actions to deal with them.

2.2 Approach and Methodology

The approach to the assignment followed a process used in numerous other strategic tourism planning assignments by the consulting team. The consulting team acted as facilitators in the process working with the community and the tourism sector to define the appropriate strategic direction for Wasaga’s tourism future. The work was completed over a 4 month period (June through September) following a work plan encompassing the following 5 phases:

1. Collection and review of all relevant background materials including past tourism studies/assessments
2. Evaluation of the tourism products in Wasaga Beach – assessment of the core attractors, secondary attractions and supporting infrastructure
3. Market analysis – the existing visitation to Wasaga Beach and future market opportunities
4. Opportunities and gaps – evaluating the match between future target markets and the existing product
5. Strategy development – a blueprint for tourism in Wasaga Beach

Extensive consultation was an integral part of the approach and included the following:

• Client working sessions
• A public meeting
• An online discussion forum
• Solicitation of briefs to be submitted by email, fax or mail
• An industry workshop
• An industry visioning session
• Session with Mayor and Council
• Over 20 depth interviews with key stakeholders and group meetings
• Visitor intercept survey and license plate survey

2.3 Review of Past Reports

There has been a history of planning for tourism in Wasaga Beach. In the 1970’s a tourism plan for the community recommended the beach be closed to vehicles, a major commitment that helped shape today’s tourism character of the beach. In 1991 the Town commissioned a Tourism, Recreation and Culture Master Plan. A community tourism vision was established:

Wasaga Beach’s mission is to provide the best year round vacation destination for families in Southern Ontario and beyond, while providing the most rewarding lifestyle community setting achievable for permanent and seasonal residents.

The plan outlined a range of recommendations to help diversify the tourism product in Wasaga, many of which have been implemented, at least partially. For example the plan recommended the development of indoor tourism and recreation facilities, a new signage system and bylaw, positioning of the Dunes area for cross country skiing and hiking, and upgraded accommodation plant. There were also a range of recommendations that have not yet been achieved – the need for clustered rainy day attractions, providing opportunities for non-auto circulation and the thematic development of the different beach areas (i.e. gateway development in the NE end, beach 3 & 4 to focus on roofed resort accommodation).

In 2000 the Town commissioned the completion of a feasibility study for channelization of the river mouth and development of a marina. This review concluded that the channelization of the river mouth would be feasible and a 120 berth marina could be constructed on the river just inside the mouth (at the end of the spit near the existing boat launch), for an estimated cost of $2.6 million in 2000 $ ($21,660 per berth). The report also concluded that if nothing was done to channelize, the river mouth would gradually become less navigable due to siltation and sandbar formation. It was acknowledged that this project could have a negative consequence on the geological function of the spit area. The channelization and marina development was never implemented reportedly because the Ministry of Natural Resources (Ontario Parks) were opposed and there was a lack of available funding.
In 2002 the Town retained a consultant to complete an accommodation needs assessment. The following were
some of the key conclusions from this assessment – some still relevant today:

- Wasaga cannot maintain the status quo for both ecological and self-sustaining reasons – certain changes must be made to prevent the beach from lagging behind;
- Encourage the immediate growth of three up-market accommodations – B&B’s, lakefront condos/townhouses & exclusive beachfront RV camping;
- Develop through by-laws a minimum standard for new or additional motel-style rooms – 312 square feet including 4 piece bath; 360 square feet for an all-suite guestroom; and 750 square feet for efficiency units – maximum of 3 storeys;
- Develop through by-laws a standard for new or additional cottage style accommodation – 750 square feet, including 4 piece bath, at least 2 bedrooms and living room;
- Introduce the more affluent 3 bedroom cottage style condo;
- Develop consistent streetscape and roadside appeal of all segments of commercial accommodation;
- Begin to narrow the CT and CA zones where possible – restrict the building of commercial cabin style accommodation – new motel or hotel developments require mandatory business plans – develop grading system for accommodation – stricter policing of by-laws;
- Create an on-theme activity based attraction(s) area at Beach One including one stop reservation centre for booking local and regional activities;
- Initiate a strategic plan to re-develop and improve commercial strip on beach area 1;
- Build a shared facility attraction for both residents and visitors – study supports recreational, theatre and exposition centre to attract new affluent visitor – could include large capacity performance theatre, interpretive centre with large outdoor seating capacity, a festival area and health and fitness centre with lap pools;
- Create destination marketing package; and
- Create system to monitor employment requirements and opportunities and need for long term employee housing.

A number of the recommendations have been implemented by the Town, most notably the construction of the RecPlex.

More recently Wasaga Beach has been part of several planning exercises considering tourism development and marketing across political boundaries. For example as noted earlier in the report Wasaga Beach was part of the Premier Ranked Destination evaluation process for the southern Georgian Bay region. In 2007 Wasaga Beach was part of the Georgian Bay Provincial Destination Development initiative - the Georgian Bay Coastal Route - a planning exercise to define 5 touring routes through the Georgian Bay region as part of Ontario’s Great Driving Routes. The recommended touring routes included:

1. Motorcycle Tour
2. RV tour
3. Beach tour
4. Lighthouse and marine heritage tour
5. Scenic vistas tour

Phase II for this work, when it goes ahead, will result in the creation of branding and a logo, along with a marketing program to promote the routes.

2.4 Development Context

2.4.1 Regional Population Growth Forecast

Exhibit 2-1 shows the estimated current and forecast population for the Town of Wasaga Beach together with surrounding communities and Simcoe County as a whole. Wasaga Beach is forecast to continue its strong rate of growth which includes residential development, both for permanent residents as well as the seasonal property market.

<table>
<thead>
<tr>
<th>Municipality</th>
<th>2001</th>
<th>2006</th>
<th>Forecast 2021</th>
<th>% Increase 2006-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Midland</td>
<td>16,214</td>
<td>16,300</td>
<td>17,400</td>
<td>7%</td>
</tr>
<tr>
<td>Penetanguishene</td>
<td>8,316</td>
<td>9,354</td>
<td>10,400</td>
<td>11%</td>
</tr>
<tr>
<td>Wasaga Beach</td>
<td>12,419</td>
<td>15,234</td>
<td>23,684</td>
<td>55%</td>
</tr>
<tr>
<td>Collingwood</td>
<td>16,039</td>
<td>17,290</td>
<td>21,600</td>
<td>25%</td>
</tr>
<tr>
<td>Blue Mountains</td>
<td>6,116</td>
<td>6,825</td>
<td>13,119</td>
<td>92%</td>
</tr>
<tr>
<td>Simcoe County</td>
<td>377,050</td>
<td>422,204</td>
<td>618,400</td>
<td>46%</td>
</tr>
</tbody>
</table>

Source:
Statistics Canada, Census 2001 and Census 2006
Town of Wasaga Beach Economic Development Department
Hemson Consulting Ltd., Population, Households & Employment Forecasts Update for Simcoe County, May 2004
Hemson Consulting Ltd., Population, Town of Wasaga Beach Development Charges Background Study, 2007
Town of Blue Mountains, Leisure Activities Plan, 2006

Longer term projections undertaken as part of the Development Charges Background Study (2007) show a significant increase from an estimated total of 27,130 permanent and seasonal population in the Town of Wasaga Beach as of 2006 to nearly 45,000 potential population (permanent and seasonal) in 2031.
Exhibit 2-2: Forecast of Permanent and Seasonal Population and Households, 2006-2030

Source: Hemson Consulting Ltd., Town of Wasaga Beach Development Charge Study, 2007
Note: Data differs slightly from Census 2006
Total Number of Private Dwellings in Wasaga Beach in 2006: 9,716
Number of Permanent Dwellings in Wasaga Beach in 2006: 6,236
Number of Seasonal Dwellings in Wasaga Beach in 2006: 3,480

2.4.2 Recent Residential Development Activity

Exhibit 2-3 shows the development of new residential units in the Town of Wasaga Beach over the period since 1991. The product is dominated by single family housing with multiples representing a highly limited market, but also showing signs of growth potential in years since the turn of the Century. Indeed there is significant reason to believe that the variety of product which can be built in Wasaga Beach is likely to become more diversified. Recent examples of mid-rise condominium development (e.g. Baywood Homes, Golf Course – related Marlwood Condominiums and Treetop Condominiums as well as Norwood Resorts Fractional Ownership Condominiums) suggest the deepening of the market for alternative forms of housing
tenure and an appeal to a range of market niches, including not only the move down market, but also seasonal ownership market in addition to the single detached ownership market.

Exhibit 2-3: Town of Wasaga Beach Residential Permits

The market in Wasaga Beach is also strengthened by the relative affordability of a product compared to other parts of cottage country and the immediate comparative product in the Town of Collingwood, the Town of Blue Mountains, and the Midland/Penetanguishene market. The development of a Tourism Strategy should therefore be built upon a recognition of the ongoing development pressures in the Town and the potential this creates both in terms of pressures on existing infrastructure but also opportunities to develop a range of commercial, cultural and other cultural activities that benefits visitors and residents alike.

Wasaga Beach is in many aspects a bedroom community for existing residents within the labour force. Recent data from the Town’s employment land study suggest that the net commuting (outflow) of labour force is most significant to areas outside of Simcoe County (such as the GTA and the Town of the Blue Mountains), followed by a net outflow of residents commuting daily to jobs in Collingwood.

While recognizing the commuting patterns affecting Wasaga Beach, there is an objective on the part of the Town to improve the supply of employment opportunities in the Town not only as part of the Tourism Strategy but also to improve retention of the employment and therefore economic benefits of the Town. As of the 2001 census, the highest concentration of employment (share of employment) was accounted for by the Accommodation and Food Services (approximately 16.6% of the total employment in the Town). Retail trade accounts for the next highest sector of employment (12.7%).
2.4.3 Supply of Available Development Land

Information as of December 2006 (revised April 2007) regarding residential development potential indicates the following long-term supply:

| Committed Developments – Approved and/or Under Construction | 810 units |
| Committed Developments – Draft Plan Approved                | 1,289 units |
| Uncommitted Development - Proposals                          | 4,871 units |
| **Total Units**                                              | **6,970 units** |

While this is a significant long-term supply, the Provincial Growth Plan targets for Simcoe County suggests that high levels of growth in Wasaga may be required (JH to confirm/adjust). The Town’s current build-out population as per the Wasaga Beach Official Plan is some 35,000 persons. However, the requirement to bring the Official Plan into conformity with the Provincial Growth Plan may result in an increase in forecast build-out population.
3. **Wasaga Beach Tourism Product**

### 3.1 Regional Context

In 2001 the Ministry of Tourism, Tourism Investment Development Office, recognized the southern Georgian Bay region (area between Owen Sound and Waubashene) as a distinct destination area and used it as a test case for assessing the Premier Ranked Destination framework’s utility in planning Ontario destination regions. The consultants retained by the Ministry defined three natural destination areas within the larger region — Collingwood/Blue Mountains/Thornbury, Wasaga Beach and Midland/Penetanguishene. They determined that the broader region ‘has four key strengths that sustain its current attractiveness, and position the whole of the region for substantial growth in visitation’:

1. The quality of its resource base and the opportunities it provides for outdoor recreational pursuits;
2. The quality of its cultural heritage resource base;
3. The fit between these attributes and the current and emerging wants held by tourists; and,
4. The region’s proximity to the large and growing population base in southern Ontario and across the borders at Niagara, Windsor and Sarnia’.

Some of the key weaknesses of the region were identified as follows:

- A low yield destination, lacking the attractions, beds and quality in the accommodations sector to attract higher spending overnight visitors who are not owners of private cottage, chalet or condo accommodations;
- Still lacking in depth and breadth of activities and supporting facilities and services, particularly those of a “weatherproof” nature, when compared to other leading resort destinations;
- A regional market destination, unable as yet to significantly penetrate markets from beyond the Provincial borders; and,
- Still a highly summer oriented seasonal destination, notwithstanding the relative strength of winter and shoulder visitation to the central part of the region’.

Today, 6 years later, the region has evolved and some of the weaknesses have been mitigated, particularly in the Collingwood Blue Mountain sub-area, most notably with the introduction of Intrawest and the new Village at Blue. The evolution of the Blue Mountain resort makes for a useful case study for Wasaga Beach.

**Blue Mountain Case Study**

The Blue Mountain Ski Area was founded in 1941 by Jozo Weider. In the early days skiers came to Blue Mountain on the train arriving at the Craigleith Train Station and then being transported by horse drawn carriage or car to the slopes at Blue. Over the years the facilities expanded and a number of
private ski clubs were started along the escarpment adjacent to Blue Mountain. Today there are 5 private ski clubs extending along this section of the escarpment with in excess of 5,000 members, many of the members owning weekend residences in chalet subdivisions on club lands and in the surrounding areas. Blue Mountain has become a major destination resort attracting 700,000 skier visits each winter and with increasingly strong visitation in the other three seasons, with a forecast year round visitation of 2.3 million in the not too distant future.

Up until the 1980’s the Collingwood and Blue Mountain tourism industry was highly seasonal with a strong winter season and relatively low visitation in the summer months and little in the spring and fall – essentially the opposite of the Wasaga Beach tourism industry today. The transition to a year round destination evolved over a number of years with several significant development steps. The first small diversification into the summer season took place when Blue Mountain built the Great Alpine Slide Ride in 1977. The first serious step into year round diversification came in the late 1980’s when the Resort added the Monterra Golf Course, the first resort hotel and conference centre and a condominium development. Then in 1999 the family-owned resort announced a partnership with Intrawest Corporation, which lead to the development of the slopeside village and a second gold course – the Raven at Lora Bay (recently sold). Today the Resort has completed a major portion of the planned 1000 condo-hotel units and 100,000 square feet of retail and restaurant commercial space. According to Gord Canning, CEO of Blue Mountain Resorts the condo-hotel market has levelled off and construction will be slowing down while they determine the optimum strategy in moving forward.

The convention and meetings market is critical to the resort particularly in the months of May, June, September and October. Current facilities include:

- 10,000 sq ft of meeting space in the Westin Trillium House Hotel
- 37,000 net sq ft of floor space in the Village at Blue Mountain Conference Centre
- 13,000 sq ft in the Blue Mountain Inn Conference Centre
- 10,000 sq ft in the grand Central Lodge

According to management of the resort the convention business is strong but erratic and not yet at capacity. Major competitors for convention business include Deerhurst Resort, Niagara Falls, and the Nottawasaga Inn. Once capacity is reached with existing facilities there is a second planned major convention facility.

The low visitation months for the resort are April and November. According to management the resort is now doing a lot more packaging into surrounding areas, even as far way as Muskoka. In the summer season the resort has a regular shuttle bus service to the Blue Mountain beach on Georgian Bay where they typically get as many as 800 guests on peak weekends.
It is also interesting to note that Wasaga Beach is an important bedroom community for Blue Mountain. At present 11% of Blue Mountain’s full time employees (out of approximately 400) reside in Wasaga Beach while 15% of part time employees live there (out of close to 1,500 part time employees). During the winter months the resort rents a motel in Wasaga Beach for their foreign employees from the Caribbean. They run a bus service to and from Wasaga for their employees.

As the management and marketing staff at Blue Mountain are increasingly recognising, the region’s appeal as a destination is more than just one of the component parts even if one of those parts is a destination resort like Blue Mountain. The proliferation of southern Georgian Bay lifestyle magazines (i.e. On The Bay, Our Homes Southern Georgian Bay and Bay Area Golfing) is evidence to the growing awareness and appeal of the region. The true appeal to the area lies in the critical mass and diversity of attractions and experiences. The destination is more than the individual 3 sub-areas. It is also comprised of an increasing diversity of golf courses (from low end to championship signature courses), numerous small quaint villages like Creemore, Thornbury and Flesherton, and other attractions like agri-tourism, special events and festivals, biking trails, cross country ski trails and commercial areas, public and private alpine ski areas, marinas, 2 small airports (Collingwood Airport and Edenvale Aerodrome) and a range of accommodation (from B&B’s to resort hotels) and a wide range of restaurants. The region still lacks a distinct and appealing brand like Muskoka, but it is developing significant market recognition and appeal despite this fact.

The other side of Wasaga Beach, the Tiny Tay Peninsula, is also developing but not at the same pace as the western side of Nottawasaga Bay. The natural orientation to the Midland/Penetang sub-area seems to lie more to the north along the east shores and island archipelago of Georgian Bay. The small beach communities extending up the sandy shores of Nottawasaga Bay towards Christian Island do share a geographical relationship with Wasaga Beach. But once one makes it around Cedar Point the orientation seems to shift to the islands that extend east and north from Christian Island to Waubashene and up the eastern shores of Georgian Bay. In large part the growing tourism sector in Midland, Penetang and the smaller communities in that section of the Bay are based on the marina and boating sector. The appeal for the boaters lies north up the Bay not as much west into Nottawasaga Bay. Nottawasaga Bay does not have the boating appeal as it is a large open body of water without the protection and appeal of an island archipelago – good for open water sailing but lacking the appeal of the 30,000 islands type environment. This fact along with the shallow entrance to the river limits the boating potential for the communities in Nottawasaga Bay, like Wasaga Beach. There are some strong heritage and cultural attractions in the Midland/Penetang area including the Martyrs Shrine, Discovery Harbour, Sainte Marie Among the Hurons and Huronia Museum and Ouendat Village. These attractions cater to less than 60,000 visitors per year.
The tourism destination marketing situation in the region is somewhat convoluted (and probably a bit confusing for visitors) with the following organizations including Wasaga Beach in their tourism marketing:

- Huronia Tourism Association – operates out of the Simcoe County Museum/Simcoe County Administration Centre on Highway 26 near Midhurst – [www.discoversimcoe.com](http://www.discoversimcoe.com)
- Southern Georgian Bay Chamber of Commerce – produces the Southern Georgian Bay Visitor Guide; located in Midland; [www.southerngeorgianbay.on.ca](http://www.southerngeorgianbay.on.ca)
- Georgian Triangle Tourist Association – operates out of the Collingwood covering the Collingwood, Blue Mountain, Wasaga Beach and Meaford areas, and are currently moving towards a focus on the Collingwood and Blue Mountain areas only; [www.georgiantriangle.org](http://www.georgiantriangle.org)
- Georgian Bay Tourism Marketing Partnership – smaller group of attractions and accommodation, most from Midland/Penetang area
- Simcoe County Tourism Partners – covering all of Simcoe County

Efforts to consolidate and streamline the destination marketing structure in the region would be beneficial.

### 3.2 The Attraction Base

#### 3.2.1 Attractions

The 14 km sand beach on the southern shores of Nottawasaga Bay is the core attraction for Wasaga Beach. It is the main driver for visitation to the community and the vast majority of visitors spend part of their time on the beach. The Provincial Park with responsibility for managing the beach, as well as providing and maintaining the basic supporting infrastructure (washrooms, parking, interpretation, beach cleaning, beach signage, boardwalk etc) are an integral part of the core attraction. The fact that the beach is part of a provincial park provides increased credibility to Wasaga Beach as a destination. The Provincial Park is looked upon by some as a hindrance to tourism and development. But the reality is the Park provides credibility to tourists and ensures the conservation of the beach environment that is attracting tourists in the first place. The other major natural features in and around Wasaga including the dunes, the Nottawasaga River and Nottawasaga Bay do not presently function as core attractions, but do offer significant potential.

There are a range of other supporting attractions in Wasaga Beach but most are seasonal businesses, and with limited appeal for visitors. Visitation to these attractions is relatively low – for example Waterworld attracts in the order of 30,000 visits per year over a 70-day season. The Nancy Island Interpretive Centre (operated by Ontario Parks, a branch of the Ministry of Natural Resources) has shown declining visitation from 18,000 per year in 2003 to 16,712 in 2005, to 12,000 in 2006 (Partly a result of Jazz in the Park moving to another location). The Centre operates daily from Memorial Day to Labour Day and then weekends only to
Thanksgiving and weekends in spring. The majority of attractions would be categorized as either sports or amusement attractions. There is a distinct lack of cultural and historical attractions other than the Nancy Island Centre. There is however a rich cultural history of the Bay and Wasaga Beach (War of 1812, Aboriginal history, the Explorers, the Missionaries, first trans-Atlantic flight, lumbering, community development, and even the tourism history of Wasaga) that could be interpreted in different ways.

It is also worth noting the uniqueness of Wasaga Beach Provincial Park. It is the only park located within a municipality. Land decisions made during the establishment of the park has led to an unusual land assembly including:

- Lands regulated as a provincial park
- Lands held in title by the Town but managed as provincial park
- Lands held in title by Ontario Realty Corporation managed by Ontario Parks
- Lots scattered throughout the Town that are either Crown or regulated as park
- Lands regulated as park or crown that have either been disposed directly to the Town or where the Town has entered into land use agreements to locate facilities there (i.e. library, soccer pitch, canoe ramp etc)

A continuing close working relationship between the Park and the Town will be critical to future tourism success.

3.2.2 Festivals and Events

The Town now employs an Event Manager with responsibility for managing the special events in the community. With this person in place the Town is able to be more proactive in attracting and supporting events. Most events are held within the provincial park with support and involvement of Parks staff. There is a strong calendar of special events. The main event calendar runs from June through September with larger events like the ‘Not-so-Pro’ Volleyball Tournament, the Beachfest, and the triathlon attracting as many as 1000-1500 participants each. The annual Wasaga Under Siege re-enactment attracts in the order of 500 participants plus a significant number of spectators. There is a policy not to hold events on summer long weekends due to emergency service issues. There are also a number of events that take place in the non-summer season with a trout derby in October, a Santa Claus Parade in November and a Winterfest in February. There is no overall event tourism strategy in place in Wasaga Beach.

Wasaga Beach is a partner with Midland, Penetanguishene and Barrie in planning a major event in commemoration and celebration of the War of 1812-1815 Anniversary beginning in 2012. This event would build upon the existing Wasaga Under Siege event. This in turn is part of a larger effort throughout the province to celebrate in those parts of the province that were involved in the War (Toronto, Niagara Falls, SW
Ontario, SE Ontario). If properly developed and coordinated this event could provide an opportunity to increase awareness and visitation to Wasaga Beach and could result in some important legacies (joint working relationships, new acquired skillsets, physical facilities etc).

3.3 Accommodation Inventory
Past tourism planning initiatives for Wasaga Beach have noted the issue with the quality and range of commercial accommodation, and the need and desire to improve the quality level and add more higher end accommodation options. The Tourism Accommodation Needs and Growth Potential Study (2002) referenced earlier estimated the total accommodation plant at 1,456 camping sites, 700 seasonal roofed accommodation units and 400 year round roofed accommodation units in 2002. In order to get a perspective on the situation today one of the Town’s summer students assisted in conducting an inventory of accommodation. A detailed chart was compiled listing the facilities and services for the campgrounds, motels, hotels and cottage court businesses that were willing to respond and share information. Unfortunately not all were willing to share so it is not a fully complete inventory. The other issue was trying to determine the numbers of unlicensed businesses operating. With the assistance of the Town’s Bylaw Department a list of unlicensed establishments was also compiled, but may not be comprehensive. The following is a summary of the inventory.

**Campgrounds**
- 12 campgrounds
- 1446 fully serviced sites (83% or 10 with full serviced sites), 211 partially serviced (58% or 7 with) – at least 4 have tenting sites as well – a significant proportion are rented seasonally
- Only 2 have expansion plans
- 58% or 7 have swimming pools
- 5 (42%) take no credit cards
- For four campgrounds where we have the information the typical proportion of transient or overnight sites vs. seasonal sites is less than half of total sites
- Only 2 campgrounds (Wasaga Dunes and Pines) have star rankings with the Ontario Private Campgrounds Association (2.5 – 3.5 stars)
- There is very limited or no capacity to accommodate the larger modern RV’s that require the pull-through sites

**Roofed Accommodation**
- 67 licensed roofed accommodation businesses – there are at least 42 known unlicensed places (3 motel, 1 B&B & 38 cottage) renting rooms or cottages - 18 of which have paid but require a re-inspection before obtaining license
- 295 cottages – 63% or 42 have cottages each with avg. of 7 cottages
• 364 hotel/motel rooms – 33% or 22 have rooms each with avg. of 17 rooms
• 26 condos – 9% or 6 have condos each with avg. of 4 units
• Only 1 property is Canada Select rated – 3.5 stars – no other ratings
• 36% or 24 operate year round – most others operate from May to October
• Only 2 have restaurants and these 2 are LCBO licensed
• 18% or 12 have swimming pools
• 36% or 24 claim to have riverfront or beachfront locations
• None have spa facilities
• 2 have meeting or conference space – up to 250 capacity
• 5 are handicapped accessible and 2 others have one unit that is – 10% have some accessibility
• 40% or 27 have no air conditioning
• 25% or 17 do not accept credit cards

Total Estimated Accommodation Units and Capacity
42 licensed cottage courts + 38 unlicensed @ avg. 7 cottages = 560 units X estimated 6 per unit = 3360 persons
22 licensed motels + 3 unlicensed @ avg. 17 rooms = 425 X estimated 2 per room = 850 persons
26 condos X estimated 6 per condo = 156 persons
Total approximate roofed accommodation capacity = 4,366

In August of 2007 a member of the consulting team completed a secret shopping assessment in order to assess the quality level of both the roofed and campground accommodation in Wasaga Beach. A random list of 3 campgrounds and 9 hotels/motels and cottage courts was selected for the review.

Of the 3 campgrounds one was ranked 1 (basic, bordering on sub-standard), one was ranked 2 (basic to mid-level) and the third was ranked 3 (mid-level). Pricing quoted for the campgrounds ranged from $45 per site per night to $25 per person per night. This compared to $30-$36 per site per night at the KOA in Owen Sound over the same time period. It is reported that pricing for some campsites on peak weekends in Wasaga Beach can go as high as $100 per night/person.

Of the 9 cottage and motel businesses one was ranked 0, three were ranked 1 (less than basic), two were ranked 2-2.5 (basic to mid-level), one was ranked 3 (mid-level) and two were ranked 4-5 (mid-level to high end). Pricing for the businesses varied quite significantly ranging from $120 per night for a less than basic level operation to $190 for a basic to mid-level business to $205 for the high end. This compares to similar date pricing for hotels in Collingwood ranging from $129 - $149 per night and $304 for a one-night package including 2 rounds of golf at Blue Mountain.
Another useful piece of insight into the quality level of the accommodation plant in Wasaga Beach came from the intercept survey, where the interviewees were questioned about their level of satisfaction with their accommodation in Wasaga Beach. The chart below illustrates the levels of satisfaction for all respondents who stayed overnight in Wasaga Beach (total of 181 respondents). The results would suggest there is a relatively high level of satisfaction despite the issues inherent in the accommodation plant and the business approach of some of the operators.

![Exhibit 3-1: Percentage of Overnight Visitors by Level of Satisfaction with Their Accommodations](chart)

The following chart illustrates the level of satisfaction of Quebec overnight visitors (total of 46 respondents). Again the level of satisfaction appears to be relatively high. However it is also worth noting that accommodations came up as one of the top three improvements suggested by the visitors from Quebec and top four for all overnight visitors. The most common recommendations for improving the accommodations were as follows:

- Upgraded, better quality campgrounds, motels, hotels and cottages
- Better value
- Accommodation on or near the beach
- Chain hotels
3.4 Supporting Infrastructure

3.4.1 Food and Beverage Services
There is a very limited range of food and beverage establishments in Wasaga Beach. The only branded food services are in the fast food category and there are none in the casual, family or fine dining categories. There are a number of good quality independent local cuisine restaurants serving family style meals. The developers of the Main Beach area have made positive changes and renovations to the beachfront establishments but they still provide loud bar-type environments. There is an absence of quiet adult or family focussed facilities with a direct view of the sunsets over the Bay, or overlooking the river. It is likely that Wasaga loses a lot of trade to restaurants in the Collingwood and surrounding area, and yet the beach and river could provide for unique dining experiences.

3.4.2 Recreation and Culture Facilities
Wasaga Beach has a typical range of recreation and culture facilities for a town of 16,000 residents. The major recreation facilities are the RecPlex, the Sports Park (with 5 ball diamonds and 12 soccer pitches), and the Arena and associated Rec Hall. Cultural facilities include a library and a community historic site. There is no concerted effort to promote sports tourism in the community but there are a number of camps and tournaments
that attract from the broader region. The Rec Hall at the arena can accommodate up to 70 kids for hockey or skating camps. For the 2008 Ontario Winter Games Wasaga will support Collingwood by playing host to judo and wrestling at the RecPlex. The RecPlex has halls with capacity for 750, 350 and 220 with reportedly excess capacity during certain times of the year.

The other major recreation component in Wasaga Beach is the trail systems, reportedly a high priority for the current Council. The Ganaraska Trail (hiking only) beginning in Port Hope winds it’s way northwest with one branch extending through Wasaga to connect to the Bruce Trail by Glen Huron. In winter the main trunk trail for the Ontario Federation of Snowmobile Clubs runs directly through Wasaga Beach (connecting east to Midland and Orillia and west to Owen Sound). The other trails of note in and around the community include:

- A waterfront bicycling trail extending from 71st St to the Main Beach area;
- Wasaga Nordic Trails (snowshoe and cross country skiing and hiking in summer) with a trailhead centre (with room for improvements);
- Roadside bike trails; and
- Several small subdivision trail connections suitable for biking and walking.

There is a regional ‘Trails of Georgian Bay’ initiative working to connect the trail system in Wasaga to Collingwood’s trail system.

The trails that are in place are not well signed and promoted. With this good beginning a lot can be made of the trail opportunities and connections in and around Wasaga Beach.

3.4.3 Transportation Infrastructure

Regional Accessibility

Southern Georgian Bay is accessible from a number of major County Highways as well as Highway 400 from the Greater Toronto Area (GTA). Several planned additions to the 400-series highways will enhance accessibility from the GTA, which represents the main source of the day-use market in Wasaga Beach. Both of these planned additions are accounted for in the Growth Plan for the Greater Golden Horseshoe (2006)

**Highway 427**

The planned extension to Highway 427 (formally the GTA North Transportation Corridor), from its current terminus in Vaughan to Bolton and Simcoe County is currently in the Environmental Assessment (EA) Phase. The EA for the corridor commenced in June 2006. This extension will, assuming on-going improvements to accessibility and circulation in the Wasaga-Collingwood locality, create some level of improvement to drive times to Wasaga Beach from the GTA.
Highway 404
The MTO plans to extend Highway 404 north and then to the east to link with Highway 12 (Beaverton area) with the intent to better serve commuters and provide alternative routes to cottage country. The planned 15 km addition will run to the south end of Keswick and was confirmed in the spring of 2007. Construction is anticipated in the short-term.

Previous plans for a link between Highway 400 and Highway 404 in proximity to Bradford West Gwillimbury were not included in the Growth Plan for the Greater Golden Horseshoe.

Local Infrastructure
Traffic congestion on local roads during the summer season was cited as an issue by all respondents in the public consultation exercise conducted as part of the strategy development process.

The 2006 Transportation Study Update conducted by Ainley and Associates suggests that traffic volumes are anticipated to increase by approximately 4.5% per year over the next five to ten years based on the anticipated schedule of (principally) residential development in the Town. This contrasts with recent historic annual growth in traffic volumes along the main east-west arteries in the Town of 3.57% per year. Moreover, summer traffic volumes are consistently twice as high as the average annual daily traffic.

Previous calls for the creation of a Town by-pass have been rejected, appropriately so. It is unlikely, given that the Beach is the principal destination for most visitors, that the creation of a by-pass would relieve the existing Town highways in any significant manner.

The existing 10 Year Capital Works Plan identifies a number of road sections that warrant expansion from their current 2 lane capacity to 4 lane capacity. These sections include:
- Mosley Street: 45th Street to Sunnidale Road (2006-2008);
- River Road West: Mosely Street to Oxbow Park Road (Schoonertown Bridge) (2007-2008);
- River Road West: Oxbow Park Road – Powerline Road (2008-2009); and
- Mosley Street: Highway 26 – 45th Street and River Road West: Bell’s Park Road to Town Limit require expansion but are not identified in the Forecast.

Clearly, local infrastructure capacity limits represent a significant threat to the capacity of Wasaga Beach to provide both an improved visitor experience during the summer season as well as provide residents with the required amenities to sustain the community as an attractive location for both permanent and seasonal residence.
There is therefore a need for effective planning to meet traffic circulation needs for visitors and residents alike – this requirement is even more acute should the proposed redevelopment of the main beach properties for resort, commercial, residential and entertainment uses occur in the short to medium term.

3.5 Environmental Factors

The big issue for Wasaga Beach tourism sector is the seasonality, the dependence on the short summer beach season. *Canadian Climate Normals* for Midland (there is no station in Wasaga Beach) indicate that the daily average temperatures reach 20°C in the months of July and August and the daily maximums exceed 20°C in June, July and August. The area experiences on average 21.6 days in June, 28.9 days in July and 26.6 days in August when the maximum daily temperature exceeds 20°C. Added to this is the typical number of days in each of these months with precipitation – 11.4 in June, 10.2 in July and 11.4 in August. It is obvious that to extend and grow the tourism season Wasaga will have to add core attractions, or a critical mass of supporting attractions that have sufficient appeal to draw significant numbers of visitors year round and during inclement weather.

It would not be right to ignore the prospect of global warming and the impact that might have on the future of tourism in Wasaga Beach. According to the University of Waterloo report *Climate Change – Seasonality in Canadian Outdoor Recreation and Tourism (2006)* the current swimming season in Georgian Bay is approximately 59 days (essentially July and August) and the beach recreation season is approximately 152 days. Under the current warming climate trends the swim season could increase by 15-40 days, and the beach recreation season by 9-30 days within the period 2010-2039. A warming climate could also lead to an extended camping season and increased annual rounds of golf for the golf courses. Conversely in the winter the current snowmobile season of approximately 69 days could be decreased by 30-47 days between 2010-2039. The report suggests that the reduction in days with suitable snow conditions could motivate snowmobilers to switch to ATV’s, a move that could be very detrimental to the sensitive beach and dune ecosystem in Wasaga Beach if not controlled. Cross country skiing will also experience a shortened natural snow season, leading any commercial cross country interests to become more reliant on snowmaking support.

The other major issue of importance to future tourism is environmental sustainability and maintaining the quality of the natural environment and features upon which the tourism industry is reliant – the beach and dune ecosystem, the Nottawasaga River and the Bay. Fortunately there is a very active conservation regime in the Wasaga area including Ontario Parks and the Nottawasaga Valley Conservation Authority (NVCA).

Beach maintenance involves weekly or biweekly raking of the area between the foredune and the waters edge for risk management, cleanliness and aesthetic purposes. ATV’s, dirt bikes, and dune buggies could all pose
significant negative impacts on the foredune and backdune areas and would not be appropriate to promote in Wasaga. It will also be important for future development to respect the foredune areas to maintain the integrity of the ecosystem along the beach. The spit at the mouth of the river is a particularly sensitive location. The endangered nesting plover began nesting preparations along the spit in 2005. This species requires undisturbed shoreline dune habitats for nesting and rearing, hence the Parks interest in fencing this area off to regular use.

The Nottawasaga River has been assessed by the NVCA as having fair to poor surface water quality. The river supports walleye, northern pike and bass and provides a migratory corridor for rainbow trout and Chinook salmon. The negative ratings are related largely to inputs into the river and stream system from agricultural activities and runoff from urban areas (lawn pesticides, storm water etc) including Stayner and Wasaga Beach. In the summer months the river can, at times, experience bacteria levels exceeding the provincial guidelines for swimming.

The lake levels in Georgian Bay may also have an impact on Wasaga Beach. Lower levels, as are being experienced now provide a much larger beach area but result in shallower river mouth, hindering boat traffic. Some believe the lower lake levels are a direct result of dredging in the St Clair River, and the levels will not rise to the old high levels again. The reality may be that current levels are close to chart datum (the lowest lows on record), and this current level may just be part of a normal cycle. The water quality in the Bay is good, providing excellent opportunity for swimming and other activities. The Blue Flag designation that Wasaga Beach received this year, and will need to apply for each year, should provide increased awareness and credibility for the beach as a destination, particularly with the European markets where the Blue Flag program is well recognized and established.

### 3.6 Development Proposals with Significant Tourism Components

In addition to the proposed redevelopment scheme for the main beach, there are a number of other projects which have been proposed for Wasaga Beach, including, to a lesser or greater degree, an accommodation element or other infrastructure which serve the tourist market. Within this group are seasonal residential developments geared to the ownership market. Despite the dearth of franchise hotels in Wasaga Beach to date, several projects include conceptual plans for hotel developments, all of which would likely be franchise hotels should these be developed. At issue is the feasibility of each of the hotels which have been identified as part of broader concept plans. In addition to developments where there is explicit tourist component, the general development of commercial activity in the Town, including brand name retail chains, represents an improvement to the critical mass of commercial activity available year round within the Town. As such, these general commercial developments also offer important amenities that are an attractor to both permanent and seasonal residents as well as visitors to the Town.
Exhibit 3-3: Wasaga Beach Tourist Development

<table>
<thead>
<tr>
<th>Location</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wasaga Country Life (Phase 4B)</td>
<td>Rent cabins to travelling public</td>
</tr>
<tr>
<td>Baywood -Gateway</td>
<td>Hotel concept</td>
</tr>
<tr>
<td>Stonebridge (Hamont)</td>
<td>Hotel concept</td>
</tr>
<tr>
<td>West Wasaga Development (Cook)</td>
<td>Hotel concept (80 rooms)</td>
</tr>
<tr>
<td>Beach House Resort (Baywood)</td>
<td>Condo - zoning to allow rentals</td>
</tr>
<tr>
<td>DiGiovanni Property</td>
<td>Hotel/Campground Concepts - Zoo Park Road</td>
</tr>
<tr>
<td>Blue Beach Avenue Corp.</td>
<td>Hotel/residential condominium</td>
</tr>
<tr>
<td></td>
<td>400,000 sq. ft. shopping plaza</td>
</tr>
<tr>
<td></td>
<td>Indoor Theme Park</td>
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<tr>
<td></td>
<td>Monorail</td>
</tr>
<tr>
<td></td>
<td>8,000 parking spaces</td>
</tr>
<tr>
<td>Wasaga Country Life Phase 5 RV Park</td>
<td>52 RV Sites</td>
</tr>
<tr>
<td></td>
<td>Swimming Pool</td>
</tr>
</tbody>
</table>
4. Market Demand

4.1 National and Provincial Context
Canada’s tourism sector overall continues to perform well. However under the surface there are some serious issues. With a healthy economy the domestic market continues to grow, but the US market continues a drastic decline and key overseas markets are sluggish while key emerging markets (i.e. China, Mexico) are offsetting the US declines. At the same time record numbers of Americans are travelling to overseas destinations. Nobody fully understands the hurdles Canada is facing in the US but most assume it is a mixture of a number of factors ranging from the passport issue, the rising Canadian dollar, increasing global competition, terrorism and perhaps a feeling that Canada is not unique enough.

These trends are similar for Ontario. Numbers of visitors from the US have continued to decline sharply over the past few years and January to June 2007 numbers show a 16.4% decline. Overseas visitation has seen mixed results with 3 of the 4 traditional markets showing declines (UK, Japan and France) so far in 2007, being offset by emerging markets such as Mexico, South Korea, India and China. Looking forward travel from overseas is expected to do well while visitation from other provinces is expected to be sluggish. As in the rest of Canada domestic tourism is the bread and butter and continues to grow in a healthy economy – representing over 60% of total tourism receipts in the province.

4.2 Relevant Market Trends
The World Tourism Organization (WTO) predicts continued growth in international tourism over the next decade. However, the nature of tourism activity will change, and some of those changes will be profound. The emergence of newly affluent consumers in China and India, the changing travel behaviour of North American baby boomers as they age and the impact of the internet on buying behaviour are just of few of the factors that will shape tourism in the coming decades. The following are some of the trends that need to be considered in planning and marketing for future tourism growth in Wasaga Beach.

The Changing Nature of Families
The changing composition of families will have a significant impact on how, when and where people travel. The traditional nuclear family is changing, and as it does, the traditional family vacation package is being replaced by parents with only one child, single parents with children, and multi-generational families. The increasing proportion of society choosing not to marry will also fuel higher demand for vacation products oriented to the single traveller.
North America’s population is aging and this will impact the tourism sector. Over the next two decades, the proportion of the population under the age of 55 will decline and the proportion over the age of 55, and in particular over the age of 65 will increase significantly. Ontario’s population will not only be proportionately older in two decades, they will also be proportionately less wealthy. Household composition will also change, with a proportionate increase in adult only households. For the key border states, this trend will be even more pronounced. These areas will lag behind the rest of the US in population growth, with some states projected to see a decline in total population. Mature and senior citizens will continue to migrate to the south and southwest. The border states will account for a somewhat lower share of the total US population, and that population will see a pronounced decline in disposable income.

The aging of North America’s population is projected to show a shift away from more active vacation pursuits such as soft and hard adventure, downhill skiing, fishing and even golf towards experiential or discovery-oriented vacations such as cultural activities, horticulture or culinary, and softer adventure or nature-based activities like bird watching.

**Shorter Vacations . . . and Perhaps Longer?**

The trend towards shorter and more frequent vacations is not new, and the pressures underlying this trend will be equally relevant in future as issues like fear of flying, avoiding airport hassles, border crossing issues, terrorism threats etc.

However, the first wave of baby boomers are now empty nesters, many with the time, desire and the financial wherewithal to satisfy individual tastes. Over the next two decades, this age cohort may show a marked increase in longer trips, both in duration and distance.

**Trends Impacting Travel Trade**

Trends impacting the travel trade include:

- Continuing strong growth in Fully Independent Travel (FIT) providing an opportunity for suppliers who have limited ability to service large numbers at one time;
- Increased demand for custom itineraries;
- Travel trade will remain relevant particularly in longer haul markets and for those travellers seeking specialized experiences;
- Long-term relationships with travel trade are critical and tourism suppliers must be prepared to invest time and resources for at least three years before significant results are recorded; and
- Declining value of the US $ in relation to other international currencies like the Canadian $. 

The Internet and Technology
Use of the Internet by travellers, meeting planners and travel trade to plan and book will continue to respond to changes in type of technology and its use by the broader public. For example, the increasing use of hand-held, Web-enabled devices supported by on-line mapping and global positioning systems allows travellers to plan and book while on the go.

The Internet also provides destinations and individual businesses with tools to further engage the visitor, including ‘blogs’, podcasts, virtual tours and audio or video-clips. Really Simple Syndication (RSS) provides media, meeting planners, travel trade and individual travellers an opportunity to subscribe to feeds of information relevant to their interests.

Geotourism
North American consumers are increasingly seeking uniquely different experiences when they travel, and are beginning to express new requirements of the destinations and travel providers they choose. Geotourists (a term coined by National Geographic Traveler), representing almost one third of the travelling public, are travellers who are concerned with preserving a destination’s geographic character where they can meet and learn about local people and they are concerned with protecting the environment in their destination. A growing segment within the broader Geotourist market is Ecotourism – “responsible travel to natural areas that conserves the environment and improves the well being of local people” (Definition – The International Ecotourism Society) – essentially a more stringent application of sustainability principles.

Soft adventure mixed with culture
As baby boomers age, they will seek softer outdoor experiences and more information on the place they are visiting and the people who live there – the culture. There will be increasing opportunity for creating experiential or learning holidays by linking history and culture with nature-based activities such as fishing, hiking, canoeing, bird watching or wildflower viewing.

Festivals and events are key travel motivators
Special events and festivals can be categorized as attractions, drawing visitors on a short-term basis. Events can often provide a degree of urgency to draw visitors to a destination and also have the power to create media attention and exposure. Many jurisdictions are realizing the potential in developing major tourism events around historic milestones like centennials/bicentennials to grow tourism awareness and visitation. If developed properly these types of events can have lasting impact. Destinations are becoming increasingly sophisticated in the way they strategically use events to grow tourism.
Segmentation and specialization in accommodation
The accommodation sector has further segmented with such concepts as boutique hotels, all-suite hotels, limited-service and extended stay properties. The choice of accommodation broadens the market for the tourism experience by meeting a wider range of traveller needs, preferences and price points. There has also been proliferation in alternative financing concepts including time-share, fractional ownership and condo hotels.

There has been a convergence of retail, entertainment and dining
There is significant growth in “urban entertainment destinations” a term coined by the Urban Land Institute, referring to entertainment-oriented retailers such as Nike and Disney, high tech entertainment centres, themed restaurants and cinema complexes. There is also significant growth in “location-based entertainment”, involving new, high-end software driven theme park type attractions in traditionally non-entertainment locations such as shopping malls. This form of development will be a major growth area as new connections are made between the fabrication of entertainment products and tourism.

Packaging
Tourism operators and destinations are paying greater attention to packaging to make travel choices easier and to build year round travel. Packaging also recognizes the search for experiences and can motivate travel in off-peak times. Packaging is occurring around both corridors and themes and other regionally collaborative ways.

Emerging markets
New markets of staggering potential are beginning to emerge in countries such as China and India, as well as select Eastern Europe, the Gulf States, Australia, Korea and South American markets. These nascent markets will play an increasingly important role in international travel over the next two decades, if only because of the huge populations in these countries. Goldman Sachs estimates, for example, that there are already more than 50 million consumers in China with incomes equivalent to the US middle class. The emerging Chinese market has captured the greatest attention, and is arguably the largest future source of international travel.

Increase in shared interest and social group travel
The travel and tourism market is continuing to see an increase in shared interest and social groups travelling together. A shared passion such as photography, marathons, or genealogy, for example, may be the reason for the travel or simply the glue that binds the group together. These groups have different, often less formal influencers and decision-makers and each will seek destinations that meet their distinct needs. As the influence of shared interest and social group travel grows, segmentation will continue to narrow.
**Destination marketing resources**

Destination Marketing Funds have become increasingly common in Canada over the past decade. Legislated models are in place in the majority of provinces, while voluntary programs have been adopted in many Ontario cities. In 2006, destination marketing funds in Ontario totalled more than $35 million, and destination marketing organizations with access to these funds will become increasingly important decision makers in setting tourism marketing strategies at the provincial level.

**Themed attraction trends**

The following are key trends in the themed attractions sector:

- Increasingly being themed to country/region – some theme parks are becoming a symbol and showcase for regional pride, culture, and technological achievement;
- Part of larger mixed-use destination and real estate projects – creating a destination for meeting, shopping, recreation and entertainment;
- Greater visitor participation and interaction - New attractions are being designed to provide greater participant control and encourage interplay between the visitor and his environment;
- Use of simulation experiences and virtual reality - Advances in technology have allowed attractions designers to realistically duplicate virtually any natural or special effects experience;
- Greater water orientation - A greater use of water related activities, attractions and landscaping is occurring in theme park design as well as in nearly all forms of real estate development. We see a continuing acceptance of new, high technology aquariums using acrylic tunnel concepts which combine a scuba diver’s view of the undersea world with a ride experience;
- Design for all-weather operation/artificial environments - designed with a greater degree of weather protection in order to enable a longer operating season and longer operating hours per day. Future designs will incorporate indoor/outdoor combinations using new technology structures, domed enclosures and moveable walls; and
- New role for attractions - By their nature, they are designed to handle large numbers of people within a controlled space and with manageable impacts. In the future they will play an increasing educational function to introduce, interpret, and educate visitors to the local environment and to the host community and its values.
4.3 Existing/Past Visitation Patterns

Regional Tourism Context
The Town of Wasaga Beach has a number of traits similar to Simcoe County as a whole in terms of its tourism profile including, the concentration of Canadian over international visitors, a comparatively high proportion of outdoor and sports activities as principal activities undertaken, and a greater reliance upon the following type of accommodation compared to the Province as a whole:
- Resorts;
- Motels; and
- RV Parks and Campgrounds.

The following charts depict the tourism profile of Simcoe County as prepared by the Ontario Ministry of Tourism. The latest information available is from 2004. In 2004 there were 6,931,146 visits to Simcoe County of which 3,929,146 (56%) were same-day visits.

Exhibit 4-1: Same Day Visits and Total Person Visits to Simcoe County

Source: Ontario Ministry of Tourism, Regional Tourism Profiles, CD43: Simcoe County, 2004
The following chart illustrates the origins of overnight visitors to Simcoe County. In 2004, 94% of overnight visits were by Canadians, 4% were from the US, and 2% were from other countries.

Exhibit 4-2: Overnight Visitors by Origin to Simcoe County

[Chart showing distribution of visitors]

Source: Ontario Ministry of Tourism, Regional Tourism Profiles, CD43: Simcoe County, 2004

The following chart illustrates the top 10 activities for overnight visitors to Simcoe County in 2004. It is interesting to note the scale of visitation attributable to the casino in Rama.
Exhibit 4-3: Top 10 Activities on Trip in Simcoe County Among Overnight Visitors

Source: Ontario Ministry of Tourism, Regional Tourism Profiles, CD43: Simcoe County, 2004

Exhibit 4-4 below shows the composition of the accommodation infrastructure in Simcoe County, illustrating the high proportion of motels and campgrounds as compared to the Ontario averages.
Local Context
Unfortunately, nobody has accurate statistics on the actual numbers of visitors to Wasaga Beach. Statistics Canada aggregates data to the census district level – Simcoe County, as noted in the previous section.

Parks Ontario does however compile estimates for Wasaga Beach Provincial Park using the parking permit sales numbers and then applying the following formula:

- \[ \text{[average occupants per vehicle} \times \text{number of daily vehicle permits} + \text{average occupants/vehicle} \times \text{number of annual vehicle permits} \times 10 + \text{number of bus permits} \times 40] \times 5 \] (an estimate on numbers entering without paying for a parking permit i.e. 5 non-paying per permit sold)
The following chart illustrates the trend in visitation to the park between 2000 and 2006.

Using this Park visitation figure as a base the Town then add on their parking numbers times an average number of occupants and then add in a number for people walking to the beach. For purposes of the Tourism Strategy, the consulting team are assuming that visitation is around 2 million visitors per year. Based on a
summer season generously defined as May 1 to Labour Day (16 weeks) this represents average weekly visitation to the Town of 125,000 people.

To obtain an idea of the numbers of people on the beach on a typical summer weekend the consultants utilized aerial photos taken by Stonebridge Developments on the Monday of the August long weekend. The rough count of bodies on the beach determined the following figures:

- Main beach area – excluding the point and extending a little bit into Beach 2 – 2500 – 3000 people – parking full with the Fair taking up significant parking capacity;
- The point – 300 - 400 people – lots of empty spaces in the west end – east end quite full;
- Beaches 2 – 6 – 1800 – 2500 people – beaches 3 and 4 had lots of empty spaces and 5 and 6 were quite full – although the nature of the photos made it difficult to see the lots in beach 5; and

This provides an estimated total of between 5100 – 6600 people on the beach at 1pm on the August long weekend Monday. This number does not include people in the water, in restaurants or shops, at picnic tables in the Park or enroute from the parking areas. The Park issued a total of 1,869 parking permits and 6 seasonal permits on the Monday.

4.4 Primary Research Results

Due to limited accurate and up-to-date tourism statistics on the Town of Wasaga Beach, the consultants completed two surveys in July/August 2007. The first was a license plate survey and the second an intercept survey on the beach.

License Plate Survey
The license plate survey was conducted to determine the source markets of visitors. A license plate survey records the vehicle license plate number, which translates into the place of residence of the driver based on their registered vehicle. The survey was not intended to contain an exhaustive list of all visitors to Wasaga Beach, however, its sample size could be considered significant and therefore representative of the larger visitor population.

The study was conducted over three days, on Wednesday, July 25, Saturday, July 28, and Wednesday August 1. A weekday and weekend were chosen to account for the different expected volumes of visitors to Wasaga Beach on weekends as compared to weekdays. The areas surveyed were limited to the public and private parking lots around the main beach (Beach 1) and Beach 2. A map on the following page illustrates the visitors’ place of residence based on registered license plates.
Results of the survey show that the highest concentration of visitors come from the Greater Toronto Area, followed by the regions of York and Peel.

**Exhibit 4-6: Survey Results**

**Town of Wasaga Beach License Plate Survey**

<table>
<thead>
<tr>
<th>Location</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTA</td>
<td>762</td>
</tr>
<tr>
<td>Central Ontario</td>
<td>812</td>
</tr>
<tr>
<td>Northwestern ON</td>
<td>544</td>
</tr>
<tr>
<td>Eastern Ontario</td>
<td>597</td>
</tr>
<tr>
<td>Out of Province</td>
<td>1549</td>
</tr>
</tbody>
</table>

Note 1: Location zones in Ontario are set according to Census Divisions.
Note 2: Survey dates are July 26 and 29, 2007.
Source: IBI Group, in conjunction with Tourism Co.
**Intercept Survey**

Four surveyors conducted the intercept survey on the beach over 3 days – July 25, 28 and August 1 – providing some insight for both weekday and weekend beach visitors. The survey instrument and detailed tables are provided in a separate Appendix. A total of 521 random surveys were completed. The majority of visitors were from the Greater Toronto Area followed by other Ontario origins (central and southwestern) and then Quebec (close to 10% of visitors). US visitors were almost off the chart at less than 1% of the total.

![Exhibit 4-7: Where Visitors Come From](image)

Similar to the overall visitors to Wasaga Beach, overnight visitors mainly come from the GTA and the regions of York and Peel. The bulk of overnight visitors (42%) stated they were staying 4 to 7 nights, followed by 30% who reported a stay of 2 to 3 nights. The next map shows the place of residence of overnight visitors.
Exhibit 4-8: Overnight Visitors Place of Residence

Town of Wasaga Beach Intercept Survey: Overnight Visitors Staying in Wasaga Beach

<table>
<thead>
<tr>
<th>Location</th>
<th>Count</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTA</td>
<td>60</td>
<td>15.1%</td>
</tr>
<tr>
<td>Central Ontario</td>
<td>41</td>
<td>10.7%</td>
</tr>
<tr>
<td>Sudbury</td>
<td>39</td>
<td>10.1%</td>
</tr>
<tr>
<td>Southern Ontario</td>
<td>26</td>
<td>6.7%</td>
</tr>
<tr>
<td>Eastern Ontario</td>
<td>8</td>
<td>2.1%</td>
</tr>
<tr>
<td>Northern Ontario</td>
<td>6</td>
<td>1.6%</td>
</tr>
<tr>
<td>Bruce</td>
<td>2</td>
<td>0.5%</td>
</tr>
<tr>
<td>Over seas</td>
<td>2</td>
<td>0.5%</td>
</tr>
<tr>
<td>US</td>
<td>2</td>
<td>0.5%</td>
</tr>
<tr>
<td>Alberta</td>
<td>1</td>
<td>0.2%</td>
</tr>
<tr>
<td>Total</td>
<td>401</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Note 1: Location zones in Ontario are set according to the Canada Post definitions.
Note 2: Survey dates are July 20 & 22, August 1, 2007.
Source: IBI Group, in consultation with Tourism Co.
The main purpose for all the visitors was overwhelmingly to sunbathe and swim, to picnic or hike the beach. This reaffirms the notion that the beach is the major attractor (trip motivator) for visitors. The following chart demonstrates the importance of shopping and eating out at restaurants as key supporting tourism infrastructure.

Out of all visitors surveyed, 54% came for a day trip. For the remainder overnight visitors, Wasaga Beach was the primary destination for the majority (83%) while most of the others were staying in Collingwood and/or Blue Mountain (as shown in the following chart). It is interesting to note the small percentage staying in Midland/Penetanguishene as their primary destination. This would suggest the relationships and synergy is much stronger between Collingwood and the Blue Mountains than with Midland/Penetanguishene. A total of 35% of all visitors surveyed visit the Georgian Bay area in the winter – at least occasionally, primarily to the ski resorts.
Exhibit 4-10: Overnight Location of Visitors who are not Staying in Wasaga Beach

- 65% Collingwood / Blue Mountain Area
- 14% Barrie
- 7% Toronto
- 3% Midland / Penetanguishene Area
- 8% Orillia
- 3% Other

The demographic characteristics of overall visitors is summarized below:

- The majority travels with family;
- Less than 50% travel with children under 10 and over 10;
- The majority are middle aged (just over 45% between 36-50 years) with overnight travellers skewing slightly higher; and
- The majority are fairly affluent (close to 45% with income over $41,000 and over 20% over $80,000) skewing slightly higher for overnight visitors.
The top 5 improvements recommended by total visitors versus overnight visitors were as follows (details of these suggestions are included in the consultation section):

<table>
<thead>
<tr>
<th>Priority</th>
<th>Total Visitors</th>
<th>Overnight Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Beach facilities &amp; amenities</td>
<td>Beach facilities &amp; amenities</td>
</tr>
<tr>
<td>2</td>
<td>Cleaner beach</td>
<td>Cleaner beach</td>
</tr>
<tr>
<td>3</td>
<td>Food &amp; beverage</td>
<td>Food &amp; beverage</td>
</tr>
<tr>
<td>4</td>
<td>Parking</td>
<td>Accommodation</td>
</tr>
<tr>
<td>5</td>
<td>Sport &amp; recreation</td>
<td>Sport &amp; recreation</td>
</tr>
</tbody>
</table>
On a scale of 1 to 5, most visitors rated their overall experience at Wasaga Beach on the high end, as very satisfied or satisfied.

Exhibit 4-12: Percentage of Visitors by Satisfaction with Their Overall Experience at Wasaga Beach

![Pie chart showing percentages of visitor satisfaction levels at Wasaga Beach.]

It is quite clear from the industry consultation that the Quebec market is becoming an increasingly important market for Wasaga Beach. The intercept survey suggests there may be as many of 10% of total visitors and close to 20% of overnight visitors, at least during the Quebec construction holiday period. In order to help assess this market a second intercept survey was conducted by La Claie d’la Baie, a regional Francophone organization. The sample for this survey was 80 completed surveys. The consulting team also segmented out the Quebec visitors from the main intercept survey for analysis – a total sample of 48 Quebec visitors. Many of the characteristics of the Quebec market are similar to the total visitor market. The following is a summary of some of the key differences:

- The majority come from the Montreal area;
- A much smaller proportion have been to Wasaga Beach in the past;
- The most important form of accommodation for this market is campgrounds with significantly fewer visitors staying in cottages;
- They spend slightly more and tend to stay longer, but are not as affluent;
- They only come to Georgian Bay in the summer; and
- They ranked food and beverage as the greatest improvement needed.
In 1998 the Georgian Triangle Tourist Association conducted intercept surveys throughout their region, providing a useful trend assessment. A total of 681 surveys were completed in Wasaga Beach and Clearview Township. Key findings from this research were as follows:

- The vast majority of travellers were from within Canada;
- Approximately 21% were from Toronto;
- Less than 2% were from Quebec with a total of 3% from the US and 2.5% from Europe;
- Most (over 80%) had been to Wasaga Beach before;
- The largest proportion were staying for 7 days (over 20%); and
- The preferred accommodation type was cottage/vacation homes (22%) followed by VFR (18.5%), camping (14%) and resort lodge (12%).

The most notable changes between 1998 and 2007 are the significantly lower proportions of US and overseas visitors and the significant increases in visitors from both Toronto and the GTA, and Quebec. With this market shift has come a change in accommodation preference as well with a lower proportion selecting cottages and a higher proportion selecting campgrounds.

4.5 Potential Markets – Opportunities

The following section presents a summary of the variety of market opportunities that Wasaga Beach could pursue. There are many different ways to segment the markets based on activity, demographic characteristic, geographic origin, psychographics etc. There will certainly be overlap between some of the following segments but they each provide a distinct segment which can be targeted with marketing tactics.

The ‘Sunbathing or Sitting on a Beach’ Market Segment

The Travel Activity and Motivations Survey (TAMS) database provides useful data to profile the beach market. The following chart illustrates the proportion of total overnight Canadian travellers in 1997/98 and 2004/05 who took a vacation trip to sunbathe or sit on a beach. As total overnight Canadian travellers increase so did the beach travellers. The beach market would appear to be a growth market. This market segment is likely a significant component of the existing, past and future Wasaga Beach market.
The following chart illustrates the key Quebec and Ontario origins of beach travellers from the 2006 TAMS research. Both Montreal and Toronto represent huge markets, although a significant proportion of these beach travellers would likely head south to beaches in the winter. The GTA is obviously the key market opportunity for Wasaga Beach.
There are some differences in the Quebec and Ontario beach traveller markets. Quebec beach travellers are typically:

- Aged 35-54 – 47%;
- Not married – 54%;
- No children under 18 – 94%;
- Average income ranges skew lower than the Ontario averages;
- Mature singles and couples – 53%; and
- Been to Ontario in the past 2 years – 32%.

Characteristics for Ontario beach travellers are:

- Aged 25-44 years – 46%;
- Not married – 61%;
- No children under 18 – 92%;
- Affluent – 33% have average income over $100,000; and
- Mature singles represent 32% followed by young singles representing 26%.

Key destination selection factors for both markets include lots of things for adults to see and do, convenient access by car and mid range accommodation.
It is also interesting to look at the other activities beach travellers’ participate in while on vacation. The following chart illustrates the most common activities that beach travellers also participate in while on vacation. How many of these activities can Wasaga Beach cater to? If Wasaga Beach, or surrounding areas can cater to these activity interests, are the facilities or programs designed to meet or exceed the market needs and expectations? Is there potential to develop these activity opportunities in Wasaga Beach? One significant conclusion from the TAMS research is that for the most part Canadians are motivated by multiple activities on overnight vacation trips. Those activities that are strong motivators on their own though are as follows (the number in brackets indicates the proportion of travellers who indicated the activity was a strong motivator – over 50% is a strong proportion):

- Cycling on an overnight trip – 100%;
- Winter activities – 55%;
- Water-based activities – 52%;
- Golfing at a resort or on a package – 50%;
- Motorcycling on an overnight trip – 50%;
- Rock and Roll/popular concert – 50%;
- By comparison sunbathing on a beach is not as strong a trip motivator (44%), nor is visiting a national/provincial park (38%).
It is also interesting to look at the other major interests of Canadian overnight travellers in relation to going to a beach. Going to a beach is one of the top ranking activities following the more generic activities of dining in restaurants and shopping. Some of the other activities listed in the following chart can be found or developed in the southern Georgian Bay area.
Exhibit 4-16: Other popular activities for overnight Canadian travellers

- Sunbathing or sitting on beach
- Swimming in lakes
- Movies/cinema
- Casino
- Shopping for antiques
- General history museums
- Amusement park
- Lakeside/river resort
- Fresh water fishing
- Art galleries
- Farmers markets or county fairs
- Free outdoor performances
- Motorboating
- Live theatre
- Fireworks displays
- Golfing - playing an occasional game
- Amateur sports tournaments
- Water theme park
The following chart illustrates the scale of interest in winter activities including downhill skiing. Interest in winter activities is much smaller than the major activity interests in the summer season, but these winter participation markets still represent a significant market opportunity for Wasaga. One only has to look next door to see the scale of the downhill and snowboader markets at Blue Mountain and the private ski clubs. Blue Mountain alone caters to over 700,000 skier visits per year. The 5 private ski clubs in the Collingwood/Blue Mountain area represent well over 10,000 skiers, many of whom have weekend chalets in the area. Based on the TAMS database 32% of Canadian travellers (6.7 million) have access to a cottage, cabin or vacation home. Almost all of these cottages and vacation homes are in Canada and most are in the travellers’ home province. This large and growing vacation home market in the surrounding area is an important market for Wasaga to consider.
The Heritage-Interest Tourism Market
One of the most important reasons people travel is to experience another landscape, heritage and way of life. Cultural heritage tourism offers many opportunities to local communities in terms of developing the local economy while perpetuating local lifestyles and quality of life.
Consumers are increasingly seeking uniquely different experiences when they travel, and are beginning to express new requirements of the destinations and travel providers they choose. As noted earlier in the report National Geographic Traveller research characterizes over one third of the American travelling public as Geotourists. These are travellers who are concerned with preserving a destination’s geographic character – the entire combination of natural and human attributes that make one place distinct from another. These travellers prefer culturally and socially oriented travel where they can meet and learn about local people and they are concerned with protecting the environment in their destination.

Another important piece of research in the US, again completed by the Tourism Industry Association of America (sponsored by Smithsonian Magazine), is The Historic/Cultural Traveler, 2003 Edition. This research provides a profile of the cultural/historic travel in the US and examines travellers with an interest in culture, arts, history or heritage activities. With a representative sample of all American travellers the research found that:

- 81% of US adults who took a trip of at least 50 miles one way in the prior year included at least one cultural, arts, historic or heritage activity while travelling;
- Nearly half of travellers in the prior year attended a performing arts events and 4 in 10 visited a designated historic site such as a building, landmark, home or monument;
- Historic/cultural trips are more likely than the average trip to include air travel and rental car and to last 7 nights or longer including stays at commercial accommodation;
- Specific cultural, arts, historic or heritage activities or events can influence choice of destination and trip scheduling; and
- Many cultural/historic travellers extend the duration of their trip specifically to participate in such activities.

There is a very large market in the US with an interest in visiting destinations to experience cultural heritage through events, visiting historic sites, visiting museums and galleries and through cultural performances.

In Canada the Canadian Tourism Commission has commissioned special analyses of the TAMS database to assess both US and Canadian Heritage Tourism Enthusiasts. However the definition of heritage that is used in this research is not consistent with the US or international perspective on heritage tourism. The research excludes performing arts, art galleries, and concerts for example. For this assignment we have completed our own re-analysis of the TAMS database including all of the relevant heritage activities. The following points
summarize the characteristics of the US and Canadian tourism markets with an interest in heritage activities (based on the re-analysis by the Tourism Company).

**Place of Residence**
- Over 13 million Canadians and 117 million American travellers (that have participated in cultural heritage activities while on vacation within the previous two years) representing over 50% of all Canadian adults and over 50% of American adults;
- 38% of Canadian heritage travellers from Ontario with 38% of these travellers from Toronto – 22% from Quebec; and
- 7% of US heritage travellers living in New York State – 18% living in the states of NY, NJ, Ohio and Pennsylvania.

**Type of Experience**
- In both the US and Canada the primary experience sought while on a trip in the last two years was to rest, relax and recuperate;
- The #2 reason was to visit friends and relatives; and
- The #3 reason was to spend time with family away from home.

Exhibit 4-18

<table>
<thead>
<tr>
<th>Other Activities Engaged in While on a Heritage Trip</th>
<th>Canadian Top 10</th>
<th>American Top 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Restaurant dining – local cuisine</td>
<td>1. Restaurant dining – local cuisine</td>
<td></td>
</tr>
<tr>
<td>2. Shop for clothing/shoes/jewellery</td>
<td>2. Shop for clothing/shoes/jewellery</td>
<td></td>
</tr>
<tr>
<td>3. Read for relaxation</td>
<td>3. Read for relaxation</td>
<td></td>
</tr>
<tr>
<td>4. Shop book or music stores</td>
<td>4. Shop book or music stores</td>
<td></td>
</tr>
<tr>
<td>5. Movies</td>
<td>5. Shop local arts &amp; crafts</td>
<td></td>
</tr>
<tr>
<td>6. Picnic in park setting</td>
<td>6. Movies</td>
<td></td>
</tr>
<tr>
<td>7. Shop local arts &amp; crafts</td>
<td>7. Sunbath or sit on beach</td>
<td></td>
</tr>
<tr>
<td>8. Swimming in lakes</td>
<td>8. Shop antiques</td>
<td></td>
</tr>
<tr>
<td>9. Sunbath or sit on beach</td>
<td>9. Swimming in oceans</td>
<td></td>
</tr>
<tr>
<td>10. Local outdoor cafes</td>
<td>10. Zoos</td>
<td></td>
</tr>
</tbody>
</table>

*Source – 2000 TAMS Re-Analysis by the Tourism Company*

A total of 9.9% of US heritage travellers visited Ontario. Heritage travellers in both countries are slightly more likely to be female (53%), between 30 – 49 years, members of CAA or AAA and read daily and weekend
newspapers as their most frequent media type.

The Touring Markets

RV Market

In 2006 the Tourism Company conducted research on the RV market on behalf of the Ontario government and FedNor. This research helps to define the RV market for Wasaga Beach.

- The RV market in both the US and Canada is growing – both the ownership segment and the rental segment;
- There is a large proportion of the market who travel with children;
- Research suggests RV owners use their vehicles on average 26.3 days annually and travel an estimated 7,200 km;
- Key trends in the RV market include the emergence of sport utility RV’s, continued integration of high tech features, growth in year round camping, growth in oversize RV’s that need sufficient space to manoeuvre, and emergence of niche segments like women only groups;
- RVers can be defined by the type of RV they drive, by the type of experience they look for and where they stay – the 5 main segments in North America are the independent RV camper (the largest segment including weekend family campers), the destination camper (families seeking a full service RV park), full timers (older, retired adults), and club travellers (generally over 50 adults without children interested in travelling in caravan); and
- There is also an important rental RV market in Canada, primarily Europeans (Germans, Dutch, UK) who are typically adults without children touring.

Today’s increasingly sophisticated and demanding RV markets are looking for the following facilities and services as they travel:

- Nearby gas stations and RV maintenance services;
- Access to dumping stations or an area designated and approved for emptying gray and black water holding tanks;
- Stores nearby with easy manoeuvrability;
- A range of communication options including telephone connections, wireless high speed internet connections or kiosks and satellite phone service for areas not covered by cell phone;
- Flat campsites with sufficient space for manoeuvring (minimum swing radius of 50 feet for oversize RV’s);
- 30 amp service is considered a minimum and some units require 50 amps;
- Pull-through campsites for larger motor homes; and
There is now a national rating program administered by Campgrounds Camping of Canada – Camping Select www.campingselect.ca (There are only 2 campgrounds in Wasaga Beach rated by Camping Select).

Motorcycle Touring Market
In 2006 the Tourism Company conducted research on the On-Road Motorcycle market on behalf of the Ontario government and FedNor. Some of the key characteristics of this market are as follows:

• Annual sales of motorcycles have more than tripled over the past 10 years;
• In Ontario there were 19,818 new motorcycle purchases in 2005 (up 208% from 1995) and 22,310 in Quebec (up 208% from 1995) – these two provinces account for over 50% of national retail sales;
• There were a total of 409,000 motorcycles registered in Canada in 2004;
• The US market is much larger with over 8.8 million motorcycles in use (including off-road);
• The typical Canadian motorcycle purchaser is 42 years old, male, married with grown children and an above average income – the profile is similar in the US;
• There is a growing proportion of female riders; and
• A large percentage of riders are baby-boomers with more disposable income and more leisure time.

There are three major motorcycle tourism segments:
1. Independent touring - individuals, couples or groups mostly touring for the enjoyment of the experience (some travel to rallies) for half day or day trips or weekend getaways and longer trips.
2. Guided tours – usually appeals to those seeking new touring experiences but with insufficient time or resources to research touring options.
3. Events and Rallies – gatherings of riders at specified times and locations (i.e. Daytona Bike Week – the largest in the world.

An average distance of travel is between 300 to 400 miles (482-643 km) per day or a maximum of 6 hours. The number one desire of touring riders is outstanding views/scenery, along with roads that offer the excitement of curves and vistas. They are also looking for the following in their touring destinations:
• Gas stations for fuel ups at intervals of at least 2-3 hours;
• Access to maintenance and service;
• Good restaurants and nightlife;
• Accommodations that offer covered parking, air compressors, side stand pads and bike wash areas; and
• Motorcycle specific maps.
Motorcyclists are drawn to businesses and destinations that understand and respect their passion for this activity.

**Bicycle Touring**

Research on the cycle touring market for the Alberta government has determined that the typical characteristics of the cycle tourism market are as follows:

- Professional, middle ranking and senior white collar workers, with above average incomes;
- More likely to live alone or with another person;
- Primarily age 30-55 – the average is increasing;
- Their most popular interests in declining order of frequency include eating out, canoeing, camping, hiking, theatre, shopping, museums/historic sites, water sports/swimming/beaches;
- They use all types of accommodation from camping to 5 star hotels – but B&B/Inns and campgrounds are the preference for multi-day trips; and
- The average length of stay for short trips is 2 nights and for longer trips 7 nights.

Bicycle travellers are typically looking for paved roads or fine cinder paths, restaurant options with nutritious/high protein meals, and accommodation with a safe place to leave bikes, floor access to registration and rooms and washing facilities.

Quebec is the leading model for bicycle tourism in Canada. In August of this year Quebec inaugurated ‘La Route Verte” a 4,000 km connected biking network linking 16 regions and 320 municipalities, and running across the province. The route makes use of:

1. Multi-use paths (often with hikers/walkers) – comprising the largest portion of the trail.
2. Designated roadways (lighter traffic) officially recognized and signed.
3. Paved shoulder with signage (at least 1 m wide).

The route is lined with public washrooms and resting areas and there is a certification program, ‘Bienvenue Cyclists’ that certifies accommodations and campgrounds that meet the facility (i.e. bike storage, pump and tools for minor repairs) and nutritional needs of cyclists. Research in 2000 identified the following characteristics of this market:

- Spend an average of $105 per day – more than double typical tourists;
- Stay an average of 6.5 nights per trip;
- Season extends from May to September;
- Cycling nights were evenly split between roofed accommodation and camping; and
• 38% using the route were from outside the province – estimated at over 16,700 trips annually compared to 26,400 domestic trips.

Motorcoach Tours
The motorcoach tour industry is large and growing but very much changed from the old style multi-country or grand tour. Today this market is characterised by more targeted travel experiences. In 2005 the American Bus Association conducted a census on motorcoaches in the US and Canada. In 2004 there were over 3,500 companies operating nearly 40,000 coaches. An update in 2006 found the number of coaches grew by 1.5% and the mileage travelled also grew by 2.3%. The tour segment of the market in 2004 represented 7.7% of all mileage (with 58.6% of carriers offering tours) and the sightseeing segment represented 2.1% (with 28.9% of carriers offering sightseeing trips).

The 2006 TAMS research provides some insight into the scale of this market. In 2004/05 10% of Canadian travellers went on an organized or guided group tour where they stayed one or more nights in different locations. In the US the proportion was smaller at 7.7% of the total US traveller market. The motorcoach tour segment would be part of this number.

In 2001 the NTA conducted a packaged travel study that determined that a motorcoach carrying 35 passengers staying overnight in a city has a direct spending impact of US$6,405. If the same motorcoach is staying two nights the impact is US$12,810. These figures are based on an average daily expenditure per person of US$183.

In order for Wasaga beach to cater to the motorcoach market there are certain infrastructure requirements as follows:
• Accommodation with minimum of 25 rooms to accommodate one group (motorcoaches carry up to 48 passengers), breakfast available on-site, lobby space to accommodate group arrivals, food and beverage on-site, luggage and porter service;
• Attractions with good washroom and eating facilities, group meeting place, separate group entrance, sufficient to keep visitor interest for 1.5-2 hours; and
• Food and beverage facilities that can accommodate up to 48 at one time, washroom capacities for the group, parking for the motorcoach, close to highway and other attractions.

The only statistics kept on motorcoaches to Wasaga Beach are through Parks Ontario. These statistics show the motorcoach sector as being a minor part of the tourism visitation to Wasaga Beach with 46 buses in 2006 (a 19% decline in numbers since 1991). There are reportedly other motorcoaches that do stop and provide passengers time to visit the beach. But Wasaga Beach at present has limited facilities and services, or
compelling reasons, to develop motorcoach tours in any significant manner. Further packaging and facility
development is required before aggressively pursuing this market.

The Family Vacation Market
According to the TAMS research the family market represented one-third (33%) of the total travel market in
the US and Canada in 2000 when the first TAMS research was completed. The family market was defined as
families with children under 20 years living at home. This market was characterized as having an above-
average incidence of well-educated, higher income households and was actually the most affluent of the four
lifecycle markets characterized in the TAMS analysis. The family market tends to travel to shorter haul
destinations suggesting the US family market may offer less potential than the in-province and adjacent
province (Quebec) family markets. This market is looking for recuperative vacations with visits to child-
oriented attractions (i.e. zoos, theme parks, beaches). Canoeing and kayaking and hiking are all activities this
market looks for to a slightly greater extent than other market segments. They are also slightly more likely to
look for camping experiences and lakeside or wilderness lodges.

According to the US Travel Industry Association of America (TIA) Domestic Travel Market Report, 2003
Edition, one in four household trips in the US (24%) include children under the age of 18. This represents
134.9 million trips in total. Most of these trips are for leisure purposes (87%), and close to one half are taken to
visit friends and relatives. More than half of trips with children are taken by baby boomers.

The TIA completed revealing research into how leisure consumers make their travel decisions – Leisure
Travel Planning: How Consumers Make Travel Decisions, 2005. The following are some of the key findings
of relevance to Wasaga Beach.

Generally leisure tourists (whether they are entertainment, family centred, outdoor recreation or business
combined) make major trip decisions in predictable patterns in the following order:

- Trip destination;
- Trip duration;
- Budget;
- Trip activities;
- Top five on-line sources often used in planning a leisure trip;
- Airline website;
- Hotel, motel, B&B or Inn website;
- Attraction website;
- On-line search engines; and then
- DMO website.
Each of these tools are important but this research provides into the relative importance in the decision-making process for the typical leisure traveller.

**Niche Market Opportunities**

There are a wide range of niche market opportunities for Wasaga Beach. The 2006 TAMS research provides insight into the relative scale of these different activity markets and helps identify which ones are key travel, or destination motivators versus those that are just one of many activities in a destination. For some of these market segments Wasaga Beach already has the attractions and infrastructure in place. Wasaga Beach for example has one of the best venues for wakeboarding in Ontario, just inside the rivermouth, and an operator is located there catering to this market. For others they need to be developed or upgraded to today’s more discriminating and sophisticated traveller standards. For example the mini-puts in Wasaga Beach are not comparable from a design and themeing perspective to those visitors experience in destinations like Orlando.

Shopping and dining are Canadian and US travellers’ most popular activities. Dining at restaurants that offer local ingredients and recipes, shopping for clothing, shoes or jewellery, shopping for books and music, strolling around a city to observe its buildings and architecture, and sunbathing on a beach are the most popular single activities for overnight Canadian travellers. However these are not necessarily the activities that motivate them to travel. Dining at restaurants that offer local ingredients and recipes, shopping for clothing, shoes or jewellery, going to a casino or an amusement park and strolling around a city to observe buildings and architecture are the most popular single activities for overnight US travellers. Once again with the exception of amusement parks they are not the major trip motivators.

The following chart identifies those activity market opportunities for Wasaga Beach that could be trip motivators. Some of the activities have been reviewed earlier in this section but are repeated for comparative purposes. Motivating trips have been identified as those activities for which more than 50% of respondents indicated it was a motivating factor for some of their trips.
### Exhibit 4-19
**Size of Motivator Activity Markets in 2004/05**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Canadian travellers</th>
<th>% of Total</th>
<th>US travellers</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshwater fishing</td>
<td>4,227,732</td>
<td>20.0%</td>
<td>25,330,000</td>
<td>14.4%</td>
</tr>
<tr>
<td>Kite surfing</td>
<td>56,797</td>
<td>Less than .1%</td>
<td>423,000</td>
<td>0.2%</td>
</tr>
<tr>
<td>Snowmobiling</td>
<td>1,264,272</td>
<td>6.0%</td>
<td>3,414,000</td>
<td>1.9%</td>
</tr>
<tr>
<td>Golf package to play various courses</td>
<td>419,627</td>
<td>2.0%</td>
<td>2,236,000</td>
<td>1.3%</td>
</tr>
<tr>
<td>Motorcycle touring trip</td>
<td>318,789</td>
<td>2.0%</td>
<td>2,500,000</td>
<td>1.4%</td>
</tr>
<tr>
<td>Overnight cycling trips</td>
<td>284,507</td>
<td>1.0%</td>
<td>962,000</td>
<td>0.5%</td>
</tr>
<tr>
<td>Amusement Parks</td>
<td>4,351,196</td>
<td>21.0%</td>
<td>57,903,000</td>
<td>32.8%</td>
</tr>
</tbody>
</table>

Source – 2006 TAMS

**Freshwater Fishing**
Wasaga Beach already attracts anglers in the shoulder seasons with a range of species in the Nottawasaga River and in Nottawasaga Bay. Sport fishing is a declining market with the ageing population in both Canada and the US, but still a large market. There are segments that could be further developed and grown such as fly fishing and fishing derbies.

**Kite Surfing**
Kite sailing has been around in Wasaga Beach for a number of years, particularly in the Allenwood Beach area. There is a board maker based in Wasaga Beach. Requiring lots of room but lower wind profiles than windsurfing this activity could be further developed at Wasaga.

**Snowmobiling**
New participants are being attracted to snowmobile touring as a result of technological improvements with snowmobiles. These people often take several overnight trips and are willing to travel great distances. These new participants include more women, couples and seniors, corporate executives, long distance tour riders,
first time riders looking for a different winter trip, tourists from other North American areas and tourists from Europe and Asia. Today’s snowmobiler likes to tour, has a reliable, technologically advanced snowmobile and enjoys socialising as a large part of the overall experience. The big issue for Wasaga Beach in pursuing this market will be consistency of snow cover in an increasingly volatile snow season.

**Golf Package Tours**

There has been a trend over the past number of years for golf courses within close geographical areas to form marketing consortia so that they can achieve maximum leverage for their advertising and marketing budgets. These may be groups of golf courses owned and operated by the same parent company or they may be independently owned facilities. Some groups may receive significant contributions from governments for their marketing; others may receive nothing. Some consortia have developed partnerships with accommodation providers to offer full service ‘Play and Stay’ packages while other groups focus their marketing efforts solely on the golf courses themselves. The following are best practice examples:

- The Audubon Golf Trail – Louisiana;
- The Flathead Valley Golf Association – Montana;
- Pinehurst, North Carolina;
- Myrtle Beach, South Carolina;
- The Robert Trent Jones Golf Trail – Alabama;
- Niagara Falls Golf Adventure; and
- Canada’s Desert Links – southern British Columbia.

There are a wide range of good quality golf courses extending from the Midland area around and up to Owen Sound. There could be potential for Wasaga Beach to work with these adjacent areas to market the golf trail around the Bay.

**Motorcycle Touring**

As noted earlier in the report the Georgian Bay Coastal Route initiative has been established in part to develop and promote a motorcycle touring product around the Bay. To actively participate in this initiative Wasaga Beach will need to further develop the infrastructure and service needs of this market segment (as outlined on page 49) to begin to attract attention and stimulate word of mouth interest.

**Bicycle Touring**

There is strong opportunity in the southern Georgian Bay region to develop the product for this market segment. With the range of relatively quiet back roads, big hills, rolling terrain, flats and small villages the area is ideal for cycle touring. However much needs to be done to make the area cycle friendly with road signage, paved shoulders and accommodation (with food services) catering specifically to cyclists needs.
The following chart presents other activity opportunities (excluding shopping and dining) in order of Canadian market size. These activities are not motivating activities but could be an important component of a Wasaga Beach experience.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Canadian Travellers</th>
<th>% of Total</th>
<th>US Travellers</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Going to movies/cinema</td>
<td>5,691,695</td>
<td>27.0%</td>
<td>45,605,000</td>
<td>25.9%</td>
</tr>
<tr>
<td>Going to a casino</td>
<td>5,218,740</td>
<td>25.0%</td>
<td>60,594,000</td>
<td>34.4%</td>
</tr>
<tr>
<td>Visiting general history museums</td>
<td>4,351,196</td>
<td>22.0%</td>
<td>33,461,000</td>
<td>19.0%</td>
</tr>
<tr>
<td>Staying at a Lakeside/Riverside resort</td>
<td>4,469,793</td>
<td>21.0%</td>
<td>21,363,000</td>
<td>12.1%</td>
</tr>
<tr>
<td>Attending farmers markets/country fairs</td>
<td>3,993,031</td>
<td>19.0%</td>
<td>32,140,000</td>
<td>18.2%</td>
</tr>
<tr>
<td>Attending live theatre</td>
<td>3,379,641</td>
<td>16.0%</td>
<td>23,011,000</td>
<td>13.0%</td>
</tr>
<tr>
<td>Watch fireworks displays</td>
<td>3,199,274</td>
<td>15.0%</td>
<td>27,448,000</td>
<td>15.6%</td>
</tr>
<tr>
<td>Mini golf</td>
<td>2,515,967</td>
<td>12.0%</td>
<td>23,121,000</td>
<td>13.1%</td>
</tr>
<tr>
<td>Cycling – same day excursions</td>
<td>2,225,414</td>
<td>11.0%</td>
<td>8,451,000</td>
<td>4.8%</td>
</tr>
<tr>
<td>Cross country skiing</td>
<td>3,207,659</td>
<td>6.0%</td>
<td>2,341,000</td>
<td>1.4%</td>
</tr>
<tr>
<td>Waterskiing</td>
<td>1,096,068</td>
<td>5.0%</td>
<td>6,552,000</td>
<td>3.7%</td>
</tr>
<tr>
<td>Travelling in RV</td>
<td>926,331</td>
<td>4.0%</td>
<td>7,338,000</td>
<td>4.2%</td>
</tr>
<tr>
<td>Snowshoeing</td>
<td>856,315</td>
<td>4.0%</td>
<td>1,369,000</td>
<td>0.8%</td>
</tr>
<tr>
<td>Kayaking or canoeing - freshwater</td>
<td>783,552</td>
<td>4.0%</td>
<td>8,598,000</td>
<td>4.9%</td>
</tr>
<tr>
<td>In-line roller blading</td>
<td>597,062</td>
<td>3.0%</td>
<td>2,105,000</td>
<td>1.2%</td>
</tr>
<tr>
<td>Scuba diving – lakes/rivers</td>
<td>157,993</td>
<td>1.0%</td>
<td>918,000</td>
<td>0.5%</td>
</tr>
<tr>
<td>Windsurfing</td>
<td>230,457</td>
<td>1.0%</td>
<td>631,000</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

*Source – 2006 TAMS*
Sport Tourism
The Canadian Sports Tourism Alliance defines sports tourism as “any activity in which people are attracted to a particular location as a sport event participant, an event spectator, or to attend sport attractions or business meetings.” This is an existing market for Wasaga Beach in a small way with summer skating and hockey camps and this segment may offer some future growth potential.

Participants include three major categories:
- Active participants—individuals who engage in sport for the purposes of competition with others, under a set of rules, or to improve their personal sporting performance;
- Volunteers—individuals who volunteer their time and expertise in sport (for example, as a coach, a driver, an official or a fundraiser); and
- Attendees—individuals who attend sporting games or events to observe.

Sport is a major economic activity in Canada. In 2004, $15.8 billion of household spending was on sports, representing 1.2% of Canada’s gross domestic product. While the proportion of adults who actively participated in sports dropped from 45% in 1992 to 31% per cent in 2004, sports spending rose significantly during the same period, from 0.9% of GDP to 1.2%. Canadians participate in many sports, but the majority of time, effort and resources are concentrated on a handful of the most popular. Not surprisingly, ice hockey is in a class by itself as the most popular sport in all categories, leading all other sports in Active Participants, Volunteers and Attendees. Four other sports attract significant participation in all three categories – soccer, baseball, basketball and volleyball. While the majority of time, effort and expenditures on sports are local in nature, sports and travel have an important relationship.

The market for sports events may be segregated by:
- The nature of the event activity – single or multi sport;
- The geographic focus of the event – local, regional, provincial, national or international;
- Invitational events – events that are open to a (usually) limited number of participants that meet specific event criteria (performance standards, league standing, win-loss record);
- Created events – an increasingly common form of event, often created specifically to generate tourist activity during shoulder of off-peak seasons, or to enhance the impact and appeal of an anchor event;
- Professional sports teams – while most of the attendance for professional sports is from the local or day-trip market, they do generate economic activity from visiting teams and from post-season play; and
- Competitive versus non-competitive events (e.g. coaching clinics).
The following chart identifies the size of some key overnight team sport travellers in Canada in 2004/05.

<table>
<thead>
<tr>
<th>Team sport</th>
<th>Canadian Travellers</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ice hockey</td>
<td>1,067,214</td>
<td>5.0%</td>
</tr>
<tr>
<td>Beach volleyball</td>
<td>752,617</td>
<td>4.0%</td>
</tr>
<tr>
<td>Baseball or softball</td>
<td>622,801</td>
<td>3.0%</td>
</tr>
<tr>
<td>Tennis</td>
<td>536,128</td>
<td>3.0%</td>
</tr>
<tr>
<td>Soccer</td>
<td>521,388</td>
<td>2.0%</td>
</tr>
<tr>
<td>Paintball</td>
<td>173,834</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

Source – 2006 TAMS

The Quebec Market

The Quebec market deserves special mention as an opportunity for Wasaga Beach given the strong growth the community has experienced over the past few years. The Ministry of Tourism and the Ontario Tourism Marketing Partnership Corporation (OTMPC) have been struggling with the importance of this market as an opportunity for Ontario and at present have decided not to spend much of their limited resources to attract this market. Direction Ontario, a government funded group based out of northern Ontario are very active in marketing (website, guide books, consumer show attendance) into the Quebec market. Wasaga Beach is within one of the destination areas or tour circuits Direction Ontario are promoting.

There is strong evidence that the Quebec market is becoming an increasingly important market segment – from the ad hoc comments from operators during the consultation to the intercept survey proportions. Although not statistically representative samples of Wasaga Beach visitors the 1998 Georgian Triangle intercept survey determined the Quebec market represented 2% of those surveyed. This year with the beach intercept survey in July/August identified that the Quebec market represented close to 10% of those surveyed, almost as much as the proportion from SW Ontario. The intercept survey provided some useful insights into this market as follows:

- Higher propensity than average beach visitors to be at Beach 1 and 2;
- Prefer tent camping, followed by hotel/motel, RV camping and then rental cottages;
- Top 3 suggested improvements were food and beverage (better range of choices, higher quality, vendors on the beach and serving alcohol on the beach), beach facilities and amenities (rental umbrellas, outdoor showers, more and better washrooms, picnic tables and more garbage cans), accommodation (better quality, more choice, on the beach);
• Most (72%) were staying overnight in Wasaga beach, and a lower proportion had stayed in Wasaga Beach before when compared to the typical beach visitor; and
• They expressed a relatively high degree of satisfaction with their experience at the beach and most (79%) indicated they would come back.

La Clé d'la Baie conducted an intercept survey in Wasaga Beach targeting just Quebec travellers. With a total of 80 completed surveys this research also provides some very useful insights into this market as follows:
• 62% were from Montreal, with a further 9% from the Gatineau area and another 9% from Quebec and area;
• Close to 50% (45%) were travelling with children, and the majority of the others were travelling with friends;
• Most found the quality of French services in the area to be unsatisfactory, particularly at shops, restaurants and cultural attractions, and would like to see more effort in bilingualism;
• Most plan to come back;
• The most commonly used accommodation was campgrounds followed by hotel/motels and they typically stay for a week; and
• The regional attractions they liked included the Scenic Caves, the go-karting and Canada’s Wonderland.

Toronto Ethnic Markets
The City of Toronto with a population of close to 2.5 million (the GTA is 5 million) is touted as one of the most multicultural cities in the world. Over 100 languages are spoken in the City and over a third of residents speak languages other than English in their homes. Between 2001 and 2005 the Toronto CMA welcomed an average of 107,000 international immigrants each year. On the last census 43% of Toronto residents reported themselves to be part of a visible minority. The top four minority groups in Toronto are as follows:
2. South Asian – 10.3% - 253,920.
4. Filipino – 3.5% - 86,460.

Many businesses and products are recognizing the potential of the ethnic markets and have recognized the particular needs of these markets. Unfortunately there is little in the way of tourism research targeting the ethnic markets. Some of these markets offer significant potential for Wasaga Beach and in fact some of these markets are already discovering Wasaga Beach, like the Toronto Italian market did back in the 50’s and 60’s. The important lesson from the experience of others already pursuing these markets is they require careful
targeting – talking to them in their own language, as appropriate, and understanding their particular travel motivations, desires, and barriers.

**Accessible Destination Market**
According to the 2006 TAMS research there were 1.2 million Canadian travellers (close to 6% of all travellers), and 16.1 million US travellers (9% of total) indicated that an accessible travel destination was highly important to them when choosing a destination for an out-of-town pleasure or vacation trip. A further 3.2 million Canadians and 32.5 million Americans said it was somewhat important to them in choosing a destination. For Canadian travellers the top three trip motivators were:
1. Shopping for clothes/shoes/jewellery.
2. Sunbathing/sitting on a beach.
3. Fresh water fishing.

For American travellers the top three trip motivators were:
1. Visiting amusement parks.
2. Going to casinos.
3. Eating in local restaurants.

Sunbathing and sitting on beaches is a more important activity for this market than others in both countries. Lots of things to see and do in the destination are also very important to this market.
5. **Product Market Match**

This chapter sets the context for evaluating the match between the products that exist in Wasaga Beach and the market opportunities. The first section presents a summary of the stakeholder input – both ideas and issues. The second is a summary of the analysis of the strengths, opportunities and weaknesses and issues facing the tourism sector in Wasaga Beach. The issues are then narrowed to a list of nine key issues that this strategy needs to address, and then the fourth section presents a summary of the prioritization of market opportunities.

### 5.1 Stakeholder Consultation Summary

The consultation program comprised a range of techniques including:

- Public meeting;
- Online discussion forum;
- Solicitation of briefs by email, mail or fax;
- Individual stakeholder meetings and interviews;
- Group meetings and interviews;
- Industry workshop;
- Industry visioning session;
- Meeting with Mayor and Council; and
- Intercept survey for beach visitors.

A wealth of feedback was received over the 4-month study time frame. Many complaints, ideas and suggestions were received – too many to fully reproduce in this report. Some of the feedback the consulting team received is summarized below by thematic area:

#### Transportation

- There are major bottlenecks into and around Town;
- Not enough consideration has been given to alternative transportation forms;
- Suggest a pedestrian bridge;
- Community bike rentals;
- Parking away from beach – shuttle service in;
- Summer public transit; and
- Service between Collingwood and Wasaga.

#### Tourism vs. Locals

- Some feel there is a growing rift between local residents and the tourism sector.
The Environment
- Need for more natural beautification in key areas;
- Better signage needed;
- Need to capitalize on the beauty of the beach and the view to the west – the sunset view;
- Protect public access to the beach;
- Encourage silent sports on the river – canoeing, kayaking etc; and
- Ecotourism.

Seasonality
- Need for more activities and attractions for visitors;
- There is no real attractor for tourists in the off-seasons;
- Year round resort; and
- Indoor facilities for tourists and locals – theatre, bowling alley etc.

The Beach (many of these comments from visitors)
- Build a pier;
- More washrooms – cleaner washrooms;
- More garbage cans;
- Outdoor showers;
- Picnic tables;
- Changing stalls;
- Umbrellas or shaded areas;
- Beer and beverage service;
- Beach concessions;
- Cleaner beach;
- Lifeguards (note although Ontario Parks position on lifeguards is not open for discussion other ways to provide and pay for this service could be considered); and
- Restaurant on or adjacent to the beach.

The Town
- Hide commercial garbage bins;
- More beautification – incentive to property owners;
- Need more boat launching ramps; and
- Create a downtown – i.e. Stonebridge location.
The Product
- Opportunity for higher end accommodation;
- Need more and better quality restaurants;
- Encourage B&B’s;
- More stringent bylaw enforcement;
- Appropriate events for off-season;
- Accommodation rating system;
- Great Wolf Lodge type development;
- Casino;
- Year round entertainment or cultural attractions;
- Quality campgrounds; and
- Beach front resort.

5.2 SWOT Analysis
Through a combination of review of past reports, input received during the industry consultation, and professional evaluation the consultants have prepared a comprehensive matrix outlining the strengths, opportunities, weaknesses and issues facing Wasaga Beach tourism (see following matrix).

<table>
<thead>
<tr>
<th>Exhibit 5-1 SWOT Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengths &amp; Opportunities</strong></td>
</tr>
<tr>
<td>Natural Environment/Regional Location</td>
</tr>
<tr>
<td>Nottawasaga River</td>
</tr>
<tr>
<td>World-class beach.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Dune systems &amp; forests</td>
</tr>
<tr>
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<td></td>
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<tr>
<td>Situated on Nottawasaga/Georgian Bay for range of recreation opportunities</td>
</tr>
<tr>
<td>Beach &amp; significant natural areas protected</td>
</tr>
<tr>
<td><strong>Exhibit 5-1 SWOT Analysis</strong></td>
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</tr>
<tr>
<td><strong>Strengths &amp; Opportunities</strong></td>
</tr>
</tbody>
</table>
| with Provincial Park change. Framed in by Collingwood/Blue Mountains & Midland/Penetang Peninsula  
• 1.5 million winter visitors to Blue Mountain | More sophisticated product with longer season in both areas |
| Beautiful sunsets on the Bay | Limited venues to enjoy - the beach bars & private residences |
| Proximity GTA/Golden Horseshoe. 5.4 million people – 43% of Ontario population, 44% foreign born 1.6 million overseas visitors; 2.7 million US | Not strategically located for commercial/industrial growth.  
• Limited opportunity to capture off-season market from strategic transportation corridors. |
| **Built Environment** |  |
| Direct access to beach. Low-density periphery. Beach not urbanized. Plenty of space for Development. | Demonstrated lack of investment in tourist infrastructure. |
| Beachfront Development is prime resort/hotel real estate. | Historic land use planning poor – dealing with legacy as a result. |
| Several alternative routes into Town from the south | Congestion (but congestion is often a fact of life in coastal towns). |
| Town owns strategic parking lots - provides leverage on future development | Congested route east west through Town  
• Lack of effective signage off Hwy 26 |
| Connecting bike trail across Town & numerous hiking trail loops plus Ganaraska Trail –efforts to join trail to Collingwood | Lot of paved area  
• Very few sidewalks or roadside bike trails  
• Not true multi-use trails i.e. paved for rollerblading like the Orillia Trails for Life or the Tiny Shores Trail |
| **Markets/Marketing** |  |
| Significant historic, present and future market appeal in the beach  
• Attracting different ethnic markets from GTA  
• 2 million – 7.2 million to Simcoe County | Day tripping majority – low yield.  
• Historic role & image constrains breakout into new markets.  
• Party image  
• Is WB meeting or exceeding their needs & expectations |
<table>
<thead>
<tr>
<th>Strengths &amp; Opportunities</th>
<th>Issues &amp; Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Primarily beach goers</td>
<td></td>
</tr>
<tr>
<td>Local population base of 16,000</td>
<td>Many still look for their services &amp; shopping elsewhere</td>
</tr>
<tr>
<td>Seasonal population of 16,000</td>
<td>Highly seasonal</td>
</tr>
</tbody>
</table>
| Soft adventure & nature-based markets offer potential with appropriate product development – i.e. canoeing, kayaking, hiking, nature interpretation, wreck diving (by Christian Island), fishing on the Bay | Other neighbouring are ahead of Wasaga in pursuing some of these markets
• The current image constrains these opportunities |
| Beach as the central resource creates opportunities for surrounding retail, service, and accommodation market. | Seasonal & lower end tourism restricts depth of investment in tourism market (hotels/restaurants, etc.). |
| South Georgian Bay as multi-season destination. | Competition extends into Wasaga’s traditional summer market. |
| International tourism to Toronto as a significant market in Summer and Fall shoulder season. | Lack of active marketing and packaging. |
| Quebec Market Growth. | Highly seasonal. |
| Growing RV market being targeted by GB Initiative. | Limited market ready product in Wasaga. Very few roads around the Bay provide spectacular scenery or views of the Bay – not national or international scenic highway potential |
| Growing road biking in the area | Roads are great to biking but area not biker friendly like La Rue Verte in Quebec |
| Packaging Tour groups Tour operators from Toronto | Little awareness of packaging opportunity |
| Tourist Infrastructure |                     |
| Extensive roofed accommodation – seasonal demand, relatively stable. | Negative marketing impacts of some establishments.
• Lack of brand name hotels and modern resorts.
• Conference market captured by major resorts in the Region. |
<p>| Seasonal residential demand strong: time | Demand may exist for this product but needs to be |</p>
<table>
<thead>
<tr>
<th><strong>Exhibit 5-1 SWOT Analysis</strong></th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Strengths &amp; Opportunities</strong></td>
<td><strong>Issues &amp; Weaknesses</strong></td>
</tr>
<tr>
<td>share/fractional opportunity.</td>
<td>encouraged through effective improvements to Wasaga image, range of services.</td>
</tr>
<tr>
<td>Wasaga Beach Provincial Park – a year round resource. Hiking, cross country, snowshoeing trails</td>
<td>Focus on day use</td>
</tr>
<tr>
<td>Range of food services &amp; retail</td>
<td>No branded restaurants &amp; extensive low end retail</td>
</tr>
<tr>
<td>Proposed Development projects.</td>
<td>Market driven and hence timing is uncertain.</td>
</tr>
</tbody>
</table>
| New RecPlex and sports fields with some excess capacity.  
  • New investment as population grows.  
  • Sport tourism potential. | No sport tourism strategy. |
| Projected community growth will create services which can also meet needs of tourists. | A long-term change, with no immediate impact. |
| Some level of Regional marketing co-ordination – the Georgian Bay Coastal Route | |
| Opportunity to maximize potential of events planning/co-ordination. Several events have tourist appeal | No tourism events strategy. |
| Range of policy options and incentives available for Community Improvement. | Useful to facilitate private property enhancement but dependent on motivation of owner. |
| Larger scale capital funds for Community Improvement – Municipality should identify projects. | Competitive process/not a panacea for private sector-led investment. |
| Four golf courses | Lower quality than courses in surrounding areas |
| Two existing marinas | Very limited marina capacity |
| Some diversity of primarily summer oriented outdoor attractions | High seasonality constrains re-investment & expansion |
| Located on provincial snowmobile trail system | Unpredictable snow cover |
| Cross country & snowshoeing trails in the | Unpredictable snow cover without man-made snow |
### Exhibit 5-1 SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths &amp; Opportunities</th>
<th>Issues &amp; Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Park</td>
<td>Global warming</td>
</tr>
<tr>
<td>Opportunity to host events for exposure</td>
<td></td>
</tr>
<tr>
<td>Historical/cultural interpretation potential</td>
<td>Undeveloped in any significant way beyond Nancy Island</td>
</tr>
</tbody>
</table>

#### 5.3 Key Issues

The following key issues were prioritized with the assistance of industry representatives and key stakeholders in the workshop and visioning sessions. The 9 most important issues facing Wasaga Beach tourism are listed below.

**Seasonality**

The existing tourism sector is highly seasonal, focused around the summer beach season and school summer holidays. A highly seasonal industry is a major issue creating a very inefficient business climate in terms of asset utilization and return on investment (ROI) for the private sector, and posing crowding and capacity problems. According to the *Canadian Climate Normals* the southern Georgian Bay region experiences on average 22 days in June 29 days in July and 27 days in August with maximum temperatures over 20°C, and about 11 days each month with some rain.

**Lack of Alternative Attractions**

The beach is the main attractor and most supporting attractions are outdoors oriented. There is significant gap in the provision of indoor entertainment and attractions suitable for inclement weather and year round tourist draw.

**Transportation**

Transportation into and around the community is a major issue. Given the linear nature of the town and the beach there is no easy solution. Wasaga is off the main highway (26) and is not a primary commercial centre within the region, and yet it does receive pass through traffic around the Bay creating further congestion. There is a significant gap in provision of alternative transportation opportunities within the community.

**Quality of Infrastructure**

There are significant gaps in the provision of a quality range of accommodation and food service options for visitors.
Town’s Image
There are fears that the lingering ‘party town’ image is continuing to hinder Wasaga Beach.

Residents vs. Tourism
With a growing population there is evidence of growing conflict between the local community and tourists. Yet, population growth and its attendant development of services should provide additional capacity to meet the needs of tourists as well.

Good vs. Bad Development
There are many new developments in the planning stages. Several are large-scale tourism developments and others have significant tourism components. How can the town screen appropriate versus inappropriate development? There have been development failures in the past.

Political Collaboration
Tourists do not look at political boundaries – they are looking for an experience in a destination area. Current collaborative initiatives between communities around the Bay should be continued.

Sustainable Development
The provincial park is looked upon by some as a hindrance to tourism and development. But the reality is the Park provides credibility to tourists and ensures the conservation of the beach environment that is attracting tourists in the first place. Sustainable development is ‘meeting the needs of the present without compromising the ability of future generations to meet their needs’. How can the Park be a partner in growing Wasaga’s tourism industry in a quality, sustainable direction?

5.4 Short Listing the Market Opportunities
Although this strategy does not include a marketing strategy it is important to begin to think strategically about the best market opportunities for future growth of tourism in Wasaga Beach. The following considerations were used to prioritize geographic markets are outlined below:
<table>
<thead>
<tr>
<th>Potential yield</th>
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<tbody>
<tr>
<td></td>
<td>▪ Per trip expenditures</td>
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<tr>
<td></td>
<td>▪ Price sensitivity</td>
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<tr>
<td></td>
<td>▪ Use of commercial accommodation</td>
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<tr>
<td>Cost effectiveness to pursue</td>
<td>▪ Market development time requirement</td>
</tr>
<tr>
<td></td>
<td>▪ Degree of competitive noise</td>
</tr>
<tr>
<td></td>
<td>▪ Ability to narrowly target key segments</td>
</tr>
<tr>
<td></td>
<td>▪ Ability to work with intermediaries (travel trade)</td>
</tr>
<tr>
<td>Future growth potential</td>
<td>▪ Economic situation</td>
</tr>
<tr>
<td></td>
<td>▪ Forecast market growth</td>
</tr>
<tr>
<td>Product advantages</td>
<td>▪ Product that meets needs and expectations</td>
</tr>
<tr>
<td></td>
<td>▪ Market readiness</td>
</tr>
<tr>
<td></td>
<td>▪ Uniqueness of product</td>
</tr>
<tr>
<td></td>
<td>▪ Competitive advantages</td>
</tr>
<tr>
<td></td>
<td>▪ Perceptions of value</td>
</tr>
<tr>
<td>Market accessibility</td>
<td>▪ Alternative transport connections (air, train, rubber tire)</td>
</tr>
<tr>
<td></td>
<td>▪ Comparative cost to travel (by air, car etc)</td>
</tr>
<tr>
<td></td>
<td>▪ Existing awareness</td>
</tr>
<tr>
<td></td>
<td>▪ Barriers to access (i.e. border issues for US visitors)</td>
</tr>
<tr>
<td>Partnership opportunities</td>
<td>▪ Level of focus from OTMPC and CTC</td>
</tr>
<tr>
<td></td>
<td>▪ Contra and cash opportunities from partners</td>
</tr>
<tr>
<td></td>
<td>▪ Level of operator interest/involvement</td>
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Based on this analysis of the market opportunities as outlined in the previous chapter (section 4.5) the following are recommended priority markets for the short and long term. The product is not there to significantly grow the spring, fall and winter markets, but some beginning inroads can be made by packaging and incrementally expanding the season. Long-term markets will of course depend on the type of attractors that are developed in Wasaga Beach in future years. Overall a major short term need in Wasaga Beach is to develop more product (retail, restaurants and attractions to increase visitor spend) and upgrade the accommodation plant to increase yield.
Short Term Market Priorities

- Focus on converting current day visitors from the GTA and Golden Horseshoe areas to overnight visitors;
- Target and grow the Quebec beach market – particularly in the Montreal area;
- Target GTA ethnic family markets;
- Work collaboratively with adjacent areas and DMO’s to develop the product and market to niche markets including motorcycle touring, bicycling, golf tour and snowmobile touring in winter;
- Use events to develop shoulder season visitation targeting southern Ontario; and
- Use packaging with adjacent attractions and events to generate higher yields and grow some of the existing markets like cross country skiing and sport fishing.

Long Term Opportunities

- Accessible destination (i.e. wheel chair) beach markets from southern Ontario and elsewhere;
- International markets in Toronto – working in partnership with travel trade;
- US family market;
- RV touring;
- Motorcoach in the summer and fall; and
- Sport tourism.

5.5 Evaluation of Main Beach Development Concept

Blue Beach Avenue Corp. currently operates several bars and restaurants along Beach Drive, and are owners of a numbers of properties along the main beachfront including much of the existing shopping mall.

Blue Beach Avenue Corp. has recently promoted plans to redevelop a large section of the existing main beach commercial district, which includes land currently owned by the City. While site plans have not been detailed as yet, it is understood that the development is to include the following:

- Indoor theme park including a waterpark snowboarding venues;
- 400,000 square feet of retail (shopping plaza);
- A mix of hotel and residential condominium suites (between 600 and 1,000 units); and
- Parking for approximately 8,000 cars.

In addition, the plans call for the development of a monorail in the City to provide access to the main beach area for visitors utilizing outlying parking lots.
Based on these plans and the broader market context for development of tourism in the Town, the following key actions should be undertaken by the Town and its development partners in realising the development potential of the main beach area over the medium term:

1. The development concept for the Main Beach should be based on a detailed site and concept planning exercise to test the capacity of the main beach area to accommodate the proposed development.

2. As part of the capacity analysis, recognise that the intensification of the Main Beach area including that part of the Beach Area 2 which has been previously marketed as a resort development property (Beachfront Resort Development) will trigger a need for traffic impact mitigation, which should be assessed as soon as possible.

3. The development will likely trigger a need for rezoning to accommodate the height of the residential towers proposed. Therefore we would recommend that the developer and the Town undertake a detailed exercise to more precisely identify the gross floor area of the residential land hotel/resort components as well as the theme park, assess traffic and circulation needs as well as any road and other infrastructure enhancements that may be required.

4. We caution that significant alternations to the road network, including widening will likely trigger a requirement for a municipal class environmental assessment (EA).

5. Any intensification of development should maintain the public access along Beach Drive to 3rd Street.

6. It is important for the development of this ambitious plan to occur, for the partners to progressively detail the implementation specifics of the project, including the infrastructure impacts and capital cost impacts, if any to the Town.

7. The merits of contributing the existing Town-owned land to the project should be clearly demonstrated by reference to the proposed site plan for the development and its phasing – for example the development of the beachfront property (Beach Area 2) may be more appropriately phased only after the proponent’s own lands have be incrementally developed and critical mass of new commercial investment established. All specifics of potential phasing of the Blue Beach Avenue development should addressed by the developer at the earliest opportunity.

8. The Town’s involvement as a partner by way of contribution of land, or other incentives, should be subject to an assessment based on a preferred development and phasing plan submitted by the developer. The developer should be able to assure the town of the market and financial feasibility of
the project and the key phases. The Town could require the developer to cover the costs to hire an independent consultant to conduct this work on behalf of both parties.
6. Strategic Tourism Plan

6.1 A Tourism Vision for Wasaga Beach

The Current Situation
Wasaga Beach is a highly seasonal resort community with significant potential. It is very much an ‘economy destination’ in both perception and reality. Tourism has been for many years, and will continue to be a cornerstone of the economy in Wasaga Beach, and must be taken seriously by the business community, the community leaders and the local residents. As noted there are a number of significant hurdles and deficiencies to growing the tourism sector in any significant way, that will require bold thinking and action by the Town. Wasaga Beach is on the verge of an exciting transition into the future with a range of private sector development interests showing vision and commitment to invest in tourism. Ontario Parks, by virtue of their role as stewards of the beach and intact dune areas will need to play a major role. Some of the legacies in the community from weak urban design and planning in the past will take time to correct. The consultants recognize there are certain constraints that cannot be fully overcome in the short term – that require capital intensive long term planning – but this is a fact of life in most historic resort towns.

Vision for Wasaga Beach Tourism
The vision statement is intended to be the community’s vision for tourism looking out 10-20 years. The vision statement will help to guide the community tourism strategy. The following is a recommended vision statement to work with. The key elements of the vision are:

- A viable multi-season tourism industry;
- Attracting domestic and international visitors for a range of unique experiences in different seasons;
- Sustainable beach, dune, and bay ecosystem; and
- Working together with adjacent destinations including Collingwood and the Blue Mountains.

*Wasaga Beach is an international, multi-season resort destination stretching along the world’s longest freshwater beach and dune ecosystem, situated on the pristine shores of spectacular Georgian Bay with the beautiful Blue Mountains as a backdrop. The community and surrounding area offers a wide range of unique visitor experiences for all ages to enjoy including opportunities to explore the areas rich natural and cultural heritage.*
Key Success Factors in Establishing a Tourism Destination

Based on our collective past experience in destination area planning there are a number of critical success factors that need to be considered in developing the Tourism Strategy for Wasaga Beach. A truly competitive destination should be strong in all the following areas (not necessarily in order of priority). Wasaga Beach is weak in a number of these criteria.

**Quality of Attractions**

Attractions can be categorized into natural, cultural, historical, amusement and educational, or any combination of these. Typically most of the natural, and some of the historical attractions (sites and buildings for example) are free and help to form the setting for other types of attractions. Successful destinations have a mix of attractions with the following attributes:

- Unique and/or original attractions (curiosity is a strong tourism motivator);
- Critical mass of attractions (like the themed indoor and outdoor water parks in the Wisconsin Dells or the entertainment venues in Branson);
- Synergies and linkages between attractions;
- Attractions with the ability to encourage multi-day visits by high yield visitors;
- Sufficient critical mass of non-seasonal and inclement weather attractions;
- Ability to appeal to a broad range of markets with some compelling reasons for more distant markets;
- Quality consistent with market needs and expectations; and
- Product that fits the desired image of the destination or community.

Successful destinations are always a work in progress given that visitors are each year looking for new products and experiences in their chosen destinations. Attractions also go through a life cycle whereby they have to be periodically rejuvenated/renewed to maintain market interest.

**The Motivating Attraction(s) – ‘Go big or go home’**

The tourism industry is, for the most part, a collection of small businesses. However, market impact is more readily obtained through large, world-class events and attractions. In fact, it can be argued that one or two large “world class” products will outperform a series of smaller, more esoteric events or attractions.

**Quality of Infrastructure and Complementary Products**

Complementary products include accommodation, shopping, food, conference facilities, exhibition centres, information services, sports venues, event spaces etc. The primary products or attractions may provide the overriding reason to visit a destination, but the complementary products can be equally important in creating a
desirable image for the destination, and influencing level of satisfaction with a visit. Complementary products are part of the checklist of requirements for destination selection for both business and leisure travellers.

The Need to Differentiate
Uniformity is happening with tourism attractions and infrastructure in many North American cities, which seem to have the same wish list:

- Brand hotels and restaurants;
- Conference facilities;
- Hotels with water theme areas;
- Large box stores and shopping malls;
- Multi-plex movie theatres; and
- Festival retail/entertainment districts.

Interestingly enough, many cities have succeeded in developing most or all of these attractions. The net result is that many town or city destinations have become increasingly homogeneous. This is not to suggest that these tourism assets are not important. However, these assets alone will not enhance the competitive position of Wasaga Beach. Sustainable growth can best be achieved by focussing on attributes that cannot easily be duplicated in other destinations, while preserving the environmental/locational elements that already are the major draw.

Accessibility of the Destination
External accessibility refers to different access modes, ease of access, cost of access, quality of reception facilities, and intermodality – the ability to transfer from one travel mode to another, and the variety of travel modes.

Accessibility for international and domestic markets is critically important for any destination’s competitiveness. Entry facilities that serve travellers visiting a community like Wasaga Beach such as the bus terminals and gateway/information centres are critical in forming the visitor’s first and often lasting impressions of the community. There has been talk of a major Georgian Bay gateway centre on Highway 26 by the new bypass. This would be a positive addition to the tourism infrastructure.

Internal accessibility
Internal accessibility refers to the public transport systems, multi-use trail systems, taxi/limousine services, road quality and congestion, parking facilities and cost, connections with external access nodes, the degree of spatial concentration of attractions and complementary products and the overall safety, cleanliness an aesthetic appeal of a community.
Image
All products have attributes, sometimes real and sometimes imagined. Opinions of these attributes can have a significant impact on the marketability of the product. Travellers develop opinions about destinations that can play a significant role in their destination selection process. A positive tourism image can have a constructive impact on the image of the city in general, and can enhance the community’s reputation as a business destination and a desirable place to live.

Wasaga Beach suffers from image problems ranging from an image as party town to negative images in the minds of some seasonal and permanent residents in surrounding areas (Source – personal communication with Rob Wong the consultant who conducted the branding research for the Collingwood BIA in 2005).

The Importance of Local Market Support
As noted earlier, demand for tourism attractions comes overwhelmingly from the domestic market – for example up to 75% of visitation for Toronto’s major attractions comes from within 200 kilometres of the City. The demographic characteristics of the short haul market are quite similar to that of the domestic day trip market, illustrating the importance of developing tourism attractions and events that strongly appeal to local residents.

Enable Private Sector Investment
The public sector role in a successful destination should be to invest in setting the stage and establishing the initial market to stimulate the private sector to invest. Wasaga Beach needs to become more proactive and private sector friendly.

Strong Accountable Marketing Support
This is a much-repeated message, but an important one. To compete effectively against other competitive destinations of a comparable size Wasaga Beach needs a consistent marketing budget of comparable size. There is a direct relationship between marketing spend and visitation levels. Perhaps the most important impact of competitive destination marketing is the ability to target and attract specific, desirable higher yield market segments.

Definition of the Destination from the Visitor’s Perspective
This is perhaps the most important success factor and one that is often overpowered by politics. Tourists do not look at political boundaries when making their vacation or travel plans. They are typically looking for an overall experience that in all likelihood crosses over political boundaries.
6.2 Mission Statement
Wasaga Beach will focus on expanding the seasonality of the tourism sector to create a healthier business climate. New attractions and experiences with substantial shoulder season appeal will be encouraged and developed to support the upgrading and expansion of the accommodation and food service plant.

6.3 Objectives
Strategic Objectives represent a series of targets by which the Town of Wasaga Beach can move toward the achievement of the Tourism Vision. The principal objectives to direct the strategy are as follows:

A: **Make Wasaga’s Tourism Product Multi-Season/Multi-Market**
- Focus on increasing visitor yield rather than numbers – a greater proportion of overnight visitors staying longer;
- Diversify attractions to extend tourism season – entertainment, cultural, interpretive opportunities;
- Diversify markets, both in terms of tourism product (activity) and geographic sources of demand, both in Ontario, Quebec, US and beyond; and
- Diversification of the tourism product will require capacity building and an identification of a range of incremental tourism additions which collectively can improve the range of experiences and extend the tourism season beyond the summer months. These additions can include the development of sport tourism, as well as a greater emphasis on historic, arts and culture tourism opportunities in the broader region.

B: **Mobilize the full potential of Wasaga Beach Provincial Park**
- The Provincial Park itself is the single most significant resource underpinning the tourism potential of the Town. There is a pressing need to better utilize the natural resources for tourism benefit – beach, river, dunes, Park, while at the same time protecting the integrity of the natural resources.

C: **Municipal Management/Partnerships**
- More effective partnership with Ontario Parks to identify joint resources for implementing improvements to the beach experience for visitors;
- Beautification of the Town (plan, funding and incentives);
- Become more business friendly and proactive to entice investment;
- Improve access to and within the town for visitors – focus on alternative transport approaches; and
- Greater enforcement of standards.

D: **Growth Management and Provision of Tourism Infrastructure**
- Balancing the needs of residents and tourists;
• Promoting residential growth and the provision of community services/building critical mass of year-round services and commerce; and
• Leveraging investment interest to include improvements to tourism infrastructure.

6.4 Strategic Directions

6.4.1 Image Enhancement – Re-Branding – And Quality Upgrade

Wasaga Beach has an image problem and there is a desire on the part of the Town to re-position the Town as a family destination. In Destination BrandScience published by the International Association of Convention and Visitors Bureaus an effective destination brand can: clearly differentiate a destination from competitors; will create a promise that frames the destination experience; present an improved image to revitalize a destination; lead to new partnerships and alliances; more fully engage the stakeholders; and lead to enhanced competitive positioning. As quoted from this report “The key for marketing organizations to become a successful Genuine Brand is to focus on distinctive and relevant experiences that enrich the visitor and provide lasting and memorable impressions.” A destination brand is based on a promise to the potential visitor.

For Wasaga Beach to re-position, the experience that the family market is looking for must be in place. This means all aspects of the visitor experience need to be present and aligned – the attractions, the urban environment, the supporting infrastructure and the people. The brand must be developed from the visitor’s perspective – the stakeholders and visitor’s perception of the brand can often be at odds. There are a number of major improvements that will need to be made over time.

• Encouraging the development of appropriate attractions – family, cultural, historical, four season;
• Attracting more quality diverse restaurant options;
• Town beautification; and
• Upgrading the accommodation plant – more stringent enforcement of bylaws and quality standards and consideration for B&B’s.

The first two points are dealt with in subsequent sections.

Town Beautification

The 1991 Leisure Plan assessment of the Town's Culture, Recreation and Tourism development options provided an ambitious plan for improvements to the Town's tourism infrastructure, development and integration of the beach resource and the urban fabric of the Town - perhaps too ambitious as it was never implemented.
In recent years the Town has made efforts to improve the aesthetic appearance of the Town's key nodes. However, a more comprehensive approach to planning for, and implementing aesthetic, functional and amenity improvements to the Towns principal public streets, as well as the interface with the beach is required.

As a first step, a beautification plan should be developed to identify the form of improvement, candidate locations for investment, overall costings and priority actions. Urban design guidelines have been developed for parts of the Town in the past but have not been implemented. The beautification plan should provide an umbrella document for a range of soft and hard infrastructure improvements to the public realm.

**Upgrading the Accommodation Plant**

There is a need for strict enforcement of bylaws by the Town, and development and enforcement of quality standards by the accommodation sector. The Town needs to get more aggressive with non-compliant commercial properties. There is far too much unlicensed commercial accommodation dragging down the image of the Town and the good operators. There is an increasing core group of professional, quality accommodation operators in the community and the Town needs to support their efforts in upgrading the accommodation plant.

One consideration for the accommodation sector may be the implementation of a local rating system for accommodation to allow for informed accommodation choice by visitors, and to assist in ensuring the product meets their needs and expectations. This type of initiative would have to be developed through a local accommodation association. Alternatively operators could be encouraged to join the Canada Select rating program.

**Consider B&B’s**

There is an issue with illegal B&B’s opening in Wasaga Beach. This is a desirable accommodation category for Wasaga but they must be developed in a compliant manner. The market for Bed and Breakfast (B&B) Accommodation is well developed in parts of Ontario and provides scope for attracting a broader range of niche markets, some of which provide higher tourism expenditure yield than the traditional markets served by Wasaga Beach at present.

In order to attract and develop this type of accommodation, the potential of Wasaga Beach to appeal to a higher end market, older couples, those on driving holidays, weekend getaways, and a range of cultural and VFR trips, is critical. Assuming that these markets are expanded based on the tourism assets of Wasaga Beach and its neighbouring communities, the following should be undertaken:

1 - The Town’s Zoning By-Law should anticipate the development of B&Bs in a range of settings. Currently, there are two zones which permit B&B establishments: Zone R1-1 which is a pre-existing zoning for
properties identified within the Zone along the Nottawasaga Riverfront, and; Zone R1-6 which is not pre-existing zoning but which is provided on a site-specific basis in response to application for B&B.

The use of a pre-existing zoning such as R1-1 is of considerable benefit to the creation of B&B establishments as it provides for this use “as of right” in these locations. It is recommended that the Town consider the expansion of the R1-1 zone to include all of the Wasaga Riverfront and Waterfront.

Bed and Breakfast establishments are currently defined under the Zoning By-Law as uses "clearly accessory to the main residential use and shall not change the residential character of the lot". This definition distinguishes these uses from other forms of roofed commercial accommodation and based on this, the widening of Zone R1-1 would be potentially appropriate. Best practice locational criteria for B&Bs should be addressed to promote B&Bs in accessible locations from the main highways through Town, and the findings of this review should inform changes to the Town Zoning By-Law.

The following specific limitation to the existing zoning may restrict the viability of bed and breakfast establishments:

a) "The bed and breakfast shall not have more than three rooms for overnight guest purposes" - this is unnecessarily restrictive.

It is recommended that the restriction to three rooms be revisited by the Town, with a view to enabling larger establishments which still meet the required Building Code and other regulatory approvals and which do not demonstrably change the residential character of the immediate area.

2. Promote adoption of Association Status (similar to Grey Bruce and Muskoka Bed and Breakfast Associations to linked to these) to create a brand for this type of accommodation over time.

3. Importantly, groups such as the Federation of Ontario Bed and Breakfast Accommodation (FOBBA) offer significant potential for marketing to broader segments of the tourism market within Ontario and elsewhere. The Annual FOBBA Guide has a distribution of some 25,000 copies and currently includes 265 individual and association members which have met the requirements of the FOBBA rating system.

4. Individual establishments should be encouraged to join FOBBA in order to maintain high quality of accommodations. The rating system is a mechanism by-which inspected B&Bs may wish to demonstrate services, which go beyond the basic level accepted by this and other associations. For Wasaga Beach, the development of a higher end B&B market would be an appropriate addition to other plans for improving the main-stream hotel/motel accommodations supply in the area.
6.4.2 Thematic Development of Beaches

The lack of a central focus or town centre in Wasaga Beach is a function of the linear nature of the beach and in turn the way the town has developed over the years. This has a negative consequence for visitors. With a 14 km beach and a numbering system for beach areas from 1-6 visitors, particularly first time visitors will typically end up arriving in Town from the west end off Highway 26 and then driving the length of the town to the Main Beach area the only location where one gets a full appreciation for the beach and the bay from a vehicle. As evidenced by the results from the beach intercept survey and the aerial photos of the beach the typical distribution of visitors and residents along the beach on a sunny summer weekend day is very erratic and disproportionate resulting in underutilized beach areas when the Main Beach is at capacity.

The 1991 Culture, Recreation and Tourism Master Plan (by LeisurePlan et al) recommended the focus be placed on nodal development along the beach targeting specific market segments, and developing the supporting programming and infrastructure to meet each markets needs. We concur with this approach and feel it would be beneficial to future tourism growth, and control of that growth, to move from a numbered beach approach to a themed beach or nodal approach. It makes sense for the Main Beach area extending to the river to expand its role as the intensive commercial entertainment core for Wasaga. The area extending east to the spit could be themed for lower intensity beach recreation and interpretation. Beach 2, also extending back to the river could be the beach resort area. Beaches 3 and 4 are already catering to the family beach group looking for a quieter section of beach. There may also be a logical role for beaches 5 and 6 and the New Wasaga/Allenwood beaches. By enabling visitors to knowingly select their desired beach experience and providing some of the programming and infrastructure in those beach areas makes marketing sense (i.e. playgrounds for young children at the family beach node, or providing outdoor showers for windsurfers and kiteboarders at Allenwood beach. Effective themeing of the beach areas would then allow for more effective directional signage as dealt with in the following section.

6.4.3 Directional Wayfinding

The longitudinal nature of the beach community of Wasaga creates challenges in terms of accessibility with congestion occurring along both River Road and Mosley Street. The separation of part of the built –up area from the beach by the Nottawasaga River creates specific accessibility concerns and channels traffic along Mosley Street from its intersection with River Road at Schooner Town.

Notwithstanding these structural realities of accessibility within the community, the concentration of visitors entering the Town from the western end could be mitigated in part by the provision of information regarding the various other entry routes to the Town and to the Main Beach area in particular. This information could be provided in map form and included as part of any printed promotional material for the Town, special events, or as part of the annual visitors guide, as well as being advertised on the Town’s web site.
In addition to advertisement of alternative routes to Wasaga Beach to take advantage of access via Sunnidale Corners and from the north along route 92, directional wayfinding within the Town could advise motorists of potential areas of congestion and provide motivation for travellers to either seek an alternative route. A variable message signage system could advise of parking or traffic congestion and provide route information to the various beaches.

6.4.4 Strategic Analysis of Existing Tourist Commercial Land Use Designation

The Town of Wasaga Beach should, as part of its review and update of its Official Plan, conduct an assessment of the strategic value of its existing lands designated Tourist Commercial, Tourist Accommodation, Recreational Commercial and District Commercial. This analysis should address the following:

1. Identification of lands (whether built or un-built) which offer the greatest opportunity for new tourism development;

2. Identification of lands designated Tourist Commercial and Tourist Accommodation which are currently underutilized, or which offer the potential for more significant development based on additional land assembly;

3. Identification of lands which are not currently designated for tourism development but which offer additional strategic opportunities for tourism and related development, including, but not limited to, lands designated District Commercial and Recreational Commercial.

Tourism, as a key sector, necessitates that existing designated land be provided additional protection within the Official Plan to limit instances of redesignation of tourism commercial lands to other uses, thereby limiting the supply of "as of right" tourism commercial development land.

While protecting tourism land is important, providing flexibility for a range of related uses which contribute to renewed investment in the existing urban area is also important. The potential for tourist commercial uses under the District Commercial and Recreational Commercial are important additional designations for tourism-related development. Given the range in quality and investment potential associated with sites designated as either Tourist Commercial or Tourist Accommodation, the Town may wish to consider a flexible approach to planning for these sites. The Town may wish to consider the creation of secondary planning exercises for certain areas of the Town which have demonstrated a decline in investment potential and quality of development.
Larger land holdings which offer potential for accommodating new, land-extensive uses (such as theme park type uses) should be identified and assessed for their merits. Additional protections for these lands may be warranted. However, it should be recognized that such sites will be limited in number and the maintenance of an adequate range of Tourist Commercial lands should not be at the expense of limiting other commercial and residential development which may represent the most appropriate long-term use of the some of the lands.

The development of mixed-use schemes that include an element of tourist uses should also be promoted.

Given the importance of maintaining higher quality design and site planning for new development, particularly commercial uses, the Town should review the provisions of the Town's Zoning By-Law as a means to improve development standards as it relates to setbacks, heights (higher density more appropriate in the main beach area), parking and allowable uses.

Site Plan and architectural control should be utilized effectively to create developments (particularly commercial and roofed accommodation) which improve the built form, pedestrian scale of development and connectivity to the Beach and other public areas.

6.4.5 Incentives and Tourism Investment Strategy

The results of stakeholder consultation suggested that the Town should demonstrate greater investment readiness. This is reinforced by the need to encourage new retail, restaurant and year round attraction development, and upgraded accommodation. More specifically, there are opportunities to enable development to proceed with effective planning controls and a range of financial and other incentives for development.

As a growth community, residential development in the Town does not require further incentives to simulate this sector. Recently, the residential market has shown signs of diversification and potential exists for a range of built forms and tenures. However, commercial development including roofed accommodation (hotels, resorts and motels) has been comparatively muted, indicative of the challenges to market viability of new commercial development which is oriented to the seasonal tourism trade.

Forms of municipal assistance can include the following:

- Designation of a community improvement project area, under provisions of Section 28 of the Ontario Planning Act: the designation of a part or all of the municipality is undertaken on the basis of the need for improved public or private investment in the commercial or residential building stock. Designation enables the municipality to consider a range of targeted financial incentives to help
stimulate new investment (development) as well as improvements to existing built resources. Examples of these programs are provided below.

- A range of property improvement grants and loans; these programs can range in scale from small grants to property owners provided on a matching basis, to large grant-loan combinations to large, low interest secured loans as appropriate. Examples include not only facade improvement grants, but also internal and exterior building improvements.

- Tax Increment Equivalent Grants (TIEGs) utilize for a specified period of time the benefits associated with the assessment and property tax generated through redevelopment initiatives. The TIEG is provided as a grant equivalent to a specified increase in the municipal portion of the increase in property tax which is generated through redevelopment.

Currently, the capacity to utilize foregone revenue as a grant payable to the property owner is limited to the municipal portion of the property tax and specifically excludes the Provincial (education) portion of the property tax. Section 28 Grants can be comprised in any appropriate form. Some Municipalities have provided grants which are not tied to taxes generated by a property. While these are generally modest in scale, they represent financial assistance which is often accessible by the property owner earlier in the process. An example of a major non-tax based funding program is the City of Brantford Performance Grant which has comprised approximately $5 million in grants payable at building completion. Total private sector investment leveraged is in the order of $20 million. Such direct and “upfront” forms of grant assistance by the municipal sector are rare. More commonly an annual property tax based grant approach is adopted which in theory reduces the financial burden on the municipality while at the same time generating funding which reflects the scale of development undertaken.

It is important that a tax increment grant reflects the risks associated with redevelopment of complicated urban sites – programs therefore need to be applicable to those instances where the developer of the site sells the interest in the site, following remediation and development, and is no longer the property owner. Referred to as an assignable Tax Increment Grant, this enables the original developer to obtain the grant even when they no longer own the property. This is particularly important in the case of the development of ownership residential properties where ownership is transferred either in fee simple or to a condominium corporation upon completion of the project.

- Municipal Fee Reductions and Waivers: for new development projects of significant scale, the development charge and building permit charges can represent a sizeable upfront development cost which can be reduced, delayed, or exempted for specific types of projects at the discretion of the
municipality. The development charge for a leisure lifestyle residential unit in Wasaga Beach is currently $5,086 (Town charge) with an additional $2,700 for the County-wide charge (and $812 as an additional education development charge). The partial or full exemption of the municipal charge (and potentially the County-wide charge) would require specific amendment to the Development Charges By-Law for a category of development or specified geographic area.

- Similarly, the building permit charge can be removed in part or in whole for a defined type of project and/or geographic area according to the provisions of any community improvement plan. Both DC and building permit exemptions would require funding of the equivalent grant amounts by the Town through its general revenues (or other designated account).

In addition to these forms of financial assistance, the municipality can signal its pro-active approach to development through the waiving of a variety of other fees at its discretion. This may include the following:

- Payment in lieu of parkland dedication (equivalent to the value of 5% of gross land area for residential and 2% for commercial).
- Planning application fees (OPA, Zoning, Site Plan Control, Plan of Subdivision, Plan of Condominium, etc.).

Beyond financial incentives, municipalities across Ontario have complimented their downtown regeneration efforts with active marketing of site redevelopment opportunities. The RFQ for the beachfront development in Wasaga Beach should be reviewed in detail to ensure greater incentive to viable private sector-led development of the lands. In other municipalities, marketing has involved the development of site redevelopment information guides for a range of identified strategic development sites.

6.4.6 Transportation Improvements

Transportation is a big issue for the future of tourism in Wasaga Beach. Proper consideration and evaluation of the alternatives (park and ride, shuttle service, monorail, alternative transport etc) is beyond the scope of this strategy and would require extensive feasibility assessment and evaluation of impacts. Increased effort in providing alternative transportation options for visitors such as biking and walking paths and trails should be an integral part of future transportation improvements.

6.4.7 Sustainable Tourism Focus

The Wasaga Beach tourism industry will always rely on the unique natural resources including the beach and dune ecosystem, the river and the Bay. This was recognized many years ago by the Province when the

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“Bicing” in Barcelona

Renting bikes is one of the most successful PSSs (Product Service Systems- access over ownership) in Europe. Lyon, Paris and London have added the bike to their public transport systems. Barcelona has developed a system they call “Bicing”. With 1500 bicycles and 100 stations, connecting other public transport stations such as metro, train, buses and major car parks, the red and white bikes can be seen all over town. 30,000 people have reportedly subscribed online.
Provincial Park was designated in order to control use of, and protect these same resources. In today’s climate of increased environmental awareness and concern and considering the growing interest of a significant proportion of the domestic and international travel markets in more responsible and sustainable destinations it makes sense for Wasaga to adopt a strong sustainable tourism focus. This sustainable tourism focus should be central to all future tourism planning and development. In Wasaga Beach this would mean:

- Keeping tourism in balance with conservation goals;
- Setting limits for acceptable change associated with tourism;
- Establishing a framework to ensure that these limits are applied fairly and effectively; and
- Defining and implementing ways and means to generate revenues to help pay for conservation activities (i.e. % of gross or net revenues from beach concessions, visitor philanthropy initiatives, % contribution from events into a conservation fund etc).

Priority should be placed on further development of interconnected and multi-use trail systems into and throughout the Town. Biking and inline skating and walking are natural transport alternatives in a resort community, and in fact are often considered part of the vacation experience. Perhaps there is a way to introduce water transport on the river as another alternative transport approach. There has been an effort made to develop trails but much more needs to be done to make the community fully pedestrian and bicycle friendly. The beach boardwalk should be extended. There needs to be more effective separation of pedestrian and vehicular traffic and trails need to be surfaced to enable multi-use (i.e. inline skaters, bikers, pedestrians etc). Proper signage of trails and creation of functional trailheads are an important component. Trailheads should provide parking, bike racks, comfort facilities, benches, and garbage receptacles.

6.4.8 Evaluation Framework for Tourism Developments

The Town is faced with an increasing number of tourism developments proposals, and residential development proposals with a tourism component. In order to assist the Town in protecting the Town’s interests in discussions and negotiations regarding these developments we have prepared an evaluation framework.

The Key to Future Tourism Growth – Major Attractors

The tourism sector in Wasaga Beach is highly seasonal, and this is the primary factor constraining the growth of a healthy tourism sector. In evaluating future tourism development proposals in the community the Council and planning staff must recognize the critical need for new or expanded multi-seasonal attractions and experiences to enable the upgrading and expansion of the accommodation and food service plant. The community needs to focus on the needs as a destination, and one of the key needs is the development, or addition of major attractors in the non-summer seasons. Once there is a more viable tourism season the existing accommodation plant needs to be upgraded.
In order to attract ongoing tourism investment into the community the tourism sector must provide attractive returns to businesses on their invested capital. Under current circumstances it is questionable whether many of the business operators are generating returns consistently high enough to reinvest in their businesses let alone attract new investment. New tourism development proposals that come before the Town must be able to demonstrate an ability to address this issue. One way would be to incorporate a new ‘must see’ attraction in their plans. A report prepared for the Ministry of Tourism in 1999 provides some useful insights in this regard.

Definition of a ‘Must See’ attraction:
(Source: Ministry of Economic Development, Trade and Tourism Attraction & Event Development Strategy, by Price Waterhouse Coopers, 1999)

- Unique and compelling to a large market – spectacular enough to entice visitors to travel long distances;
- Large visitor volumes – at least 500,000 annually (note – more likely in the range of 200,000-250,000 in Wasaga Beach);
- High expenditure potential – developed to encourage high average visitor expenditures both on and off site;
- High potential for international exposure – capable of being marketed successfully in the US and overseas;
- Not seasonally dependent – year round appeal;
- Ability to encourage multi-day visits;
- Superior accessibility – strategically located; and
- Ability to link to other Ontario attractions.

Criteria for Evaluating Development Proposals
The following are recommended considerations to assist the Town in evaluating future tourism development proposals including those currently on the books.

- There needs to be a realistic phasing plan tied to performance benchmarks before moving to the next phase;
- Must incorporate a ‘must see’ attraction, or sufficient critical mass of attractions to be capable of attracting significant numbers of visitors in the 3 other seasons with a significant proportion that stay overnight – should also be able to demonstrate the ability to expand/upgrade or rejuvenate the attraction to not only grow but maintain visitation and market appeal;
- New attractions need to be added with careful consideration to the supporting tourist infrastructure needs such as public transportation, alternative transport, circulation patterns, access to the beach,

Wisconsin Dells – Waterpark Case Study
The Wisconsin Dells got it’s name from the early French explorers who referred to the Dalles of the Wisconsin River – referring to a fast moving rocky stretch of river. The area became a popular summer vacation spot beginning back in the 1800’s focused largely around the spectacular scenery and the caves – an area best explored by steamboat or guided rowboats. Amphibious tour boats were introduced in the 1940’s. Over the years the area evolved with resorts, golf courses and different attractions and one of the first comprehensive resort communities in the US on a man-made lake (Lake Delton). In 1995 the first indoor waterpark resort was built with several others to follow over the next couple of years. Today the Dells are referred to as the ‘waterpark capital of the world’, and it is the premier resort destination in the US Midwest. More recently the area has seen the addition of a native run casino, a large movie theatre complex, golf courses, live theatres, and specialty retailers. There are now approximately 80,000 hotel rooms in the area.

In the 2001 the 18 hotels with indoor waterparks captured 75% of the total hotel market room revenue, 77% in 2003 and 81% in 2003. The 44 hotels without indoor waterparks split the leftovers.
maintaining critical viewscapes and view lines to the beach; accommodation and food services to maximize the tourists’ overall experience;

- Complementarity, or interaction with other attractions in the community and region is important;
- The concept should be able to clearly demonstrate that it meets market demand, based on sound market and financial feasibility research;
- Design should reflect the community and be sympathetic to the surrounding environment and provide a point of differentiation – in scale with the character and function of the area of the community;
- The proponents must be able to demonstrate community support for the development;
- Mixed use development combining land, residential, attraction and retail facilities typically have the potential to increase a project’s viability by catering to a broader range of markets;
- New beachfront development should continue to enable public visibility of the beach and easy public access – maintain and enhance view corridors and views of the beach and Bay;
- One of the key weaknesses in the tourism infrastructure is lack of diverse, quality restaurant services – future developments should include branded restaurants or opportunities to attract branded and independent restaurants in a range of categories – family dining (i.e. Swiss Chalet), casual dining (i.e. Keg), and fine dining;
- Staff housing must be dealt with;
- Should incorporate programmable special event space open to the public.

The following list shows the impact on average on pleasure visitors of adding one more attractor in a major urban destination like Toronto. The level of impact would not be the same for a smaller destination like Wasaga Beach but it does provide an indication of scale of opportunity with different types of development. These impacts would vary across cities depending on the number of “attractors” already present in the various cities. For example, adding one more “attractor” in a city that already has four of that type constitutes a 25% increase, while in a city that has only one it constitutes a 100% increase.

(Source - Factors Influencing Visitor's Choices of Urban Destinations in North America Ministry of Tourism, 2005)

“Attractor”/Factor Average Impact on Pleasure Visitors – using Michelin quality ratings

- 3-star Popular Entertainment + 520,000 to 600,000
- 3-star Shopping Area + 610,000 to 1,150,000
- 3-star Specific Structure + 1,020,000 to 2,870,000
- 3-star Amusement Park + 4,520,000 to 7,090,000
- Casino + 390,000 to 430,000
- Hotel Room + 79 to 104
• Hotel Property + 5,000
• 1% Improvement in Public Transport System + 70,000
• $1 Million Increase in Marketing Budget + 100,000

Michelin’s quality ratings for attractions are as follows:

3-star *** Highly recommended / Worth a journey
2-star ** Recommended / Worth a detour
1-star * Interesting / Interesting

6.4.9 Partnering with the Park
Ontario Parks will need to be contributing partners to the future development of tourism in Wasaga Beach. Ideally the long term vision would be to create a model partnership between Town, commercial sector and Park interests with a shared vision to develop a sustainable four-season tourism sector while protecting the natural resources that are the foundation. With the Park initiating a Management Planning process later this year timing is right to consider some new ways to utilize the Park lands (or adjacent areas) without compromising the integrity of the beach and dune ecosystem. The following are recommended considerations for the Park:

• There is a need and an opportunity for an enhanced interpretive/visitor centre in a more visible, accessible location with a broader interpretive mandate – covering the natural and cultural heritage of Wasaga Beach and southern Georgian Bay. The visitor centre in Pukaskwa National Park is a good example of a location and situation that provides the desired ‘wow factor’ – the centre in Algonquin Park has the same type of impact. Right now the experience is squeezed into Nancy Island with relatively small visitation numbers (2.5% of total visitors) and interpreting a limited storyline. Ideally this facility would provide a visual experience with exposure to the beach and the western skies. This should be an attraction central to the Wasaga Beach experience, providing an opportunity to educate visitors to the sensitive beach and dune ecosystem, and telling a full range of the natural and cultural heritage stories. Creative approaches to develop and fund this facility should be explored (i.e. through partnerships).

• There is need (market demand) for a quality campground (to provincial park quality standards) that provides capacity to accommodate transient visitors in Wasaga Beach. An ideal location would be in a natural area with direct access to the beach somewhere in the western end of the community.
opportunity to develop on Ontario Parks property should be investigated, perhaps as a joint venture with private sector interests, in a location that will not cause adverse environmental impacts.

- Recognising the need to protect the spit and control access according to breeding seasons, but also recognising the strategic location of the spit just east of the Main Beach area it is suggested the Park consider developing controlled access and interpretation with raised boardwalk, interpretive panels and a small gateway interpretive facility.

- The Park should consider providing or enabling the provision of services in the different beach nodes catering to the needs of the target markets – i.e. beach concessions (umbrella and beach chair rentals etc). It is our understanding that Ontario Parks will be developing a Business Review Manual to guide staff in supporting this process.

- Further investment must be made in upgrading the beach infrastructure (washrooms and outdoor showers and garbage disposal/recycling). Two comfort stations are being reconstructed this year. The other beach facilities need upgrading and or expansion as soon as possible to better meet market needs and expectations.

- Ontario Parks is not willing to consider adding lifeguards back on the beach. It is recommended that the Town consider and discuss other ways to offer this service on the beach, with Park approval, to see if there is some means of providing lifeguard services. Based on responses to the intercept survey the market would certainly seem to prefer lifeguard protected beaches, an increasingly important consideration when working to shift to a more family market.

6.4.10 Strategic Approach to Event Tourism

Tourism events are defined as events that are large, compelling to a major market and with high expenditure potential. Such events should also have a high potential for international exposure and the ability to encourage multi-day visits. To be considered a true tourism event, a material share of total participation must come from overnight tourists/visitors.

Separate and distinct from Tourism Events are two other categories of events - Growing and Emerging Festivals and Community-based Events. Growing and Emerging Festivals are those that have the potential to evolve to Tourism Events. Community-based events have a community focus and impact as opposed to a tourism focus and impact. It is recommended that Wasaga beach develop a program to focus on, support and
stimulate the creation of tourism events. This would mean setting up a financial support fund to help secure and fund start-up of appropriate events.

Accordingly, the following guiding principles are recommended. Tourism events supported by the Town:

- Should be delivered through collaborative approaches, including but not limited to joint ventures, sponsorships and strategic alliances;
- Must meet a clear tourism sector need, either across the broad sector or to a specific priority sub-sector or area;
- Must be consistent with the Strategic Tourism Plan;
- Must be sustainable, with consideration given to the requirements for long-term dependence on Town resources; and
- Must clearly deliver, within an agreed upon timeframe, the expected benefits to the tourism sector.

The following criteria are recommended for consideration in identifying/designating tourism events:

- The estimated economic impact of an event considering number of participants, spectators, support teams and others, their length of stay and their estimated daily expenditure – tourism events must generate a material level of overnight visitation with the primary purpose being travel to the event (e.g. major tourism events in Montreal must achieve at least 25,000 ticketed spectators or 250,000 spectators if the event is free with at least 15% defined as tourists).
- The role of media and the potential to create awareness of or interest in Wasaga Beach as a tourism destination to the priority and/or developing markets.
- Event frequency – giving preference to recurring events.
- Ability to secure significant private sector investment to ensure leverage of public funds.
- Fit within gaps in the Wasaga Beach event tourism calendar.

This would also entail preparation of an event strategy including all types of events with tourism impact. Wasaga Beach is an ideal venue for many sporting events like wakeboarding, kite sailing, windsurfing, beach volleyball and soccer, cross country skiing, paintball, hockey and sport fishing in the river. There is also significant potential to develop events along historical themes like the 1812 bicentennial. And there are of course events that exist or could be developed along the beach community theme (i.e. Beach Fest). Event tourism should be used as a strategic tool to expand and grow the tourism sector into all four seasons.

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**Best Practice Case Study – Greater Lansing**

The Greater Lansing CVB is recognized as a best practice model for educating local residents. The Bureau is a membership organization of approximately 450 businesses that generates revenues through a 5% bed tax. Their main initiative is an annual event – ‘Be a Tourist in Your Own Hometown’. The event was first held in 1995 targeting residents of the Greater Lansing area plus media, policy makers and travel industry stakeholders. It is designed to enable residents to learn about the community from a visitor’s perspective.

Held in late May the event relies on attractions, hotels, restaurants and transportation providers all offering special deals, ranging from complimentary admission to discounted rates. Passports are sold or given out and at each participating attraction the resident tourists have the passports stamped.

Another unique program sponsored by the Bureau is ‘Be A Guest’ Breakfast where 40 front-line employees from the tourism sector are invited to a customer-service oriented educational seminar over breakfast.
6.4.11 **Community Tourism Marketing Strategy**

Research in North America and Europe clearly illustrates that the quality of life in a city influences its ability to attract new business investment. Tourism is a significant employer, generator of government revenue and contributor to quality of life in Wasaga Beach. Yet the awareness of the value of tourism is low—even within the industry itself. The development of an effective communication plan to raise the profile of the tourism sector within government, the business community and the community at large is necessary.

The Community Tourism Marketing Strategy would be aimed at three key target audiences:

- Business and political leaders;
- The community at large; and
- All locals having contact with visitors (e.g. police, town staff).

The initial goal would be to generate a broad level of awareness of the role tourism plays in supporting recreation and culture, quality of life and economic growth. The second and perhaps more important role is to motivate involvement and activity at a variety of levels (business, political and community) aimed at supporting tourism development initiatives in Wasaga Beach. The ultimate goal should be to integrate tourism-friendly attitudes into the fabric of Wasaga’s urban life, and turn local residents into ambassadors to attract VFR tourism to the community.

6.5 **Implementation Chart**

Many of the recommended Strategic Directions involve collaboration between the Town and Ontario Parks, the tourism industry and the Town, and internally within the Municipality. Thus one of the key initial steps will be to develop small (manageable) and dedicated working groups to work out the implementation of recommendations. Three different working groups are recommended as follows:

1. A working group between the Town and Ontario Parks to follow through on the need to upgrade and expand beach services and infrastructure.
2. Tourism Leadership Council – a high level, high profile group led by the Mayor to oversee the implementation of the Tourism Strategy – the visionaries.
3. An inter-departmental working group with participation by Ontario Parks to ensure the Town becomes more proactive and efficient in seeking and processing appropriate tourism investment – the hands-on implementation team.
6.5.1 Immediate Actions (Year 1)

The other critical short term needs are to encourage new multi-season attractors/attractions to locate in Wasaga Beach and to initiate the process of upgrading and expanding the accommodation and food service infrastructure. The Town is faced with a broad range of proposed development projects with a tourism focus or a tourism component. It will be critical to properly evaluate these proposals in light of the strategy and facilitate the development planning process for those with the best fit. The evaluation framework discussed in section 6.4.8 is intended to assist in this evaluation process, helping to ensure the Town asks the right questions. The fourth key priority is to begin working on changing the Town’s image. Changing the image is not a simple marketing task – the product and experience in Wasaga Beach must match the brand image being projected. The Town needs to work hard at cleaning up non-conforming businesses, from unlicensed accommodation to illegal commercial parking lots as a first step.
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Details</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopt the tourism strategy</td>
<td>To guide future tourism development &amp; growth</td>
<td>To develop implementation plan for beach improvements &amp; consider other recommendations To be charged with implementation of strategy To streamline tourism development review &amp; approvals process &amp; review land use planning actions</td>
<td>Mayor &amp; Council</td>
</tr>
<tr>
<td>Initiate 3 working groups &amp; set up first year meeting schedule &amp; reporting schedule</td>
<td>Tourism &amp; Ontario Parks Working Group</td>
<td>Review of Tourism Policies as part of Official Plan review, to be commenced in 2008</td>
<td>Economic Development &amp; Ontario Parks</td>
</tr>
<tr>
<td></td>
<td>Tourism Leadership Council</td>
<td>Strategy to help focus both incentives for appropriate private sector development and Town-Led public realm/infrastructure improvements</td>
<td>Economic Development &amp; Mayor Planning, Economic Development, Bylaws &amp; Ontario Parks</td>
</tr>
<tr>
<td></td>
<td>Inter-Departmental Tourism Working Group</td>
<td>Review and strengthen opportunities for tourism development within land use designations framework</td>
<td>Planning</td>
</tr>
<tr>
<td>Create appropriate tourism focus in Official Plan</td>
<td>Review of Tourism Policies as part of Official Plan review, to be commenced in 2008</td>
<td>Strategy to help focus both incentives for appropriate private sector development and Town-Led public realm/infrastructure improvements</td>
<td>Planning, Economic Development (joint primary responsibility)</td>
</tr>
<tr>
<td>Create Community Improvement Project Area &amp; Community Improvement Plan</td>
<td>Develop a Community Improvement Strategy addressing development opportunities &amp; public sector infrastructure, amenity improvements</td>
<td>Public and private partner development/beautification projects approved (in-principle) &amp; costed, &amp; commence process of applying for a range of public sector funding.</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Identify funding opportunities</td>
<td>(e.g. Provincial Rural Economic Development Program).</td>
<td>Public and private partner development/beautification projects approved (in-principle) &amp; costed, &amp; commence process of applying for a range of public sector funding.</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Business Retention &amp; Expansion (BR&amp;E) Study</td>
<td>Assessment of commercial opportunities &amp; appropriate business mix</td>
<td>1. Obtain funding under the RED-BR+E program-specific application process; 2. Undertake study and consultation</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Develop a Local Tourism Marketing Plan</td>
<td>Add local residents &amp; businesses as a target market in the marketing plan</td>
<td>Prepare promo piece on value of tourism &amp; distribute Organize local FAM tour for spring 2008</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Strengthen Bylaw Enforcement</td>
<td>Allocate additional resources</td>
<td>Set examples by shutting down non-conforming businesses</td>
<td>Bylaw Department</td>
</tr>
<tr>
<td>Special events strategy</td>
<td>Create working group with Parks &amp; Facilities, sports organizations &amp; events planners</td>
<td>Include sports tourism strategy &amp; strategy for encouraging events with tourism impact</td>
<td>Events Department</td>
</tr>
<tr>
<td>Success measures</td>
<td>Establish measures to assess degree of success in implementation</td>
<td>Establish key result measurements such as number of new rooms, new shoulder season events etc</td>
<td>Tourism Leadership Council</td>
</tr>
</tbody>
</table>
6.5.2 Recommended Actions in Years 2-5

Many of the first year implementation tasks are intended to set the stage or act as catalysts for recommendations to follow in years 2-5. The implementation tasks in these subsequent years will be contingent on what can be accomplished in year 1. For example, the current Main Beach development proposals from Blue Beach would have a major impact on many subsequent recommendations. As a result it is not possible to categorize and prioritize the Strategy implementation recommendations by year. The following charts present a list of implementation recommendations for Years 2-3 and 4-5, not in any order of priority, with primary responsibility identified.
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Details</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prospectus for the Beachfront Resort lands</td>
<td>Revised prospectus if the Main beach development does not move ahead</td>
<td>Develop a professional piece that can be aggressively marketed to the Canadian tourism sector with appropriate incentives</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Town input to Park Management Planning process</td>
<td>Establish the role &amp; timing for involvement of the Town in the management planning process</td>
<td>Also include exploring projects in which the Town can assist with municipal (or grant) funding</td>
<td>Inter-departmental working group</td>
</tr>
<tr>
<td>Implementation of targeted financial incentives</td>
<td>Year 1 would see creation of policy framework and details for tourism development incentives</td>
<td>Initiation year for implementation &amp; may require specific management strategies for marketing, administering applications, disbursing funds etc</td>
<td>Inter-departmental working group</td>
</tr>
<tr>
<td>Beach infrastructure development plan</td>
<td>Prepare a long term plan &amp; an implementation/funding plan for upgrading beach infrastructure</td>
<td>Pilot testing new concessions, plan for the Point, lifeguards, new visitor interpretive centre</td>
<td>Tourism/Parks working group</td>
</tr>
<tr>
<td>Regional marketing</td>
<td>Continue to hold exploratory &amp; planning meetings with regional DMO’s to pursue joint product development &amp; marketing</td>
<td></td>
<td>Economic Development</td>
</tr>
<tr>
<td>Thematic development of beaches</td>
<td>Host a creative session to begin exploring the options for better target marketing of beaches</td>
<td>Enlist volunteer involvement of creative professionals in the community</td>
<td>Town/Parks working group</td>
</tr>
<tr>
<td>Implementation of events tourism strategy</td>
<td>Begin to implement recommendations from event strategy in Year 1</td>
<td>Monitor results annually against targets</td>
<td>Events Department</td>
</tr>
<tr>
<td>Review Town zoning by-laws</td>
<td>Facilitate start-up of B&amp;B’s</td>
<td>Expand R-1 zone to include all river &amp; waterfront &amp; change 3 room maximum provision</td>
<td>Planning</td>
</tr>
<tr>
<td>Town beautification</td>
<td>Set up incentive program for property owners &amp; more stringent policies for public spaces</td>
<td>Create a phasing plan for approved projects with annual monitoring approach</td>
<td>Inter-departmental working group</td>
</tr>
<tr>
<td>Tourism transportation assessment</td>
<td>Initiate a review &amp; assessment with transportation planners</td>
<td>Consider signage improvements, alternative forms of transportation, integrating regional multi-use trail systems &amp; solutions to congestion problems</td>
<td>Inter-departmental working group</td>
</tr>
<tr>
<td>Review development charges</td>
<td>Review charges to be applied in 2009 (under new by-law) as it applies to partial exemptions for tourist-</td>
<td></td>
<td>Planning</td>
</tr>
</tbody>
</table>
**Exhibit 6-3: Year 4-5 Actions**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Details</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Ambassadors program</td>
<td>Develop a local tourism Ambassadors to encourage local residents to proudly invite their friends and relatives to vacation in Wasaga Beach</td>
<td>Create tools &amp; programs to assist</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Beach intercept survey</td>
<td>Conduct a comprehensive beach intercept survey to measure changes in beach visitors &amp; their needs</td>
<td>Compare the results with the 2007 survey</td>
<td>Economic development</td>
</tr>
<tr>
<td>Accommodation improvements analysis</td>
<td>Undertake a critical assessment of the tourist accommodations sector</td>
<td>Review enforcement of standards, attraction of new accommodation businesses</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Re-branding</td>
<td>Initiate a strategic branding assessment</td>
<td>Create a new brand for Wasaga Beach tourism</td>
<td>Tourism Leadership Council</td>
</tr>
</tbody>
</table>

All of the recommendations and strategic directions contained in this report will require significant commitment from the various partners (Town, Ontario Parks, the tourism sector, community) and time. To give the strategy credibility and to signal the Town’s leadership commitment it is recommended that the Council adopt the strategy as the guiding document for growing a healthy tourism sector in Wasaga Beach.

To compete in an increasingly competitive tourism market Wasaga Beach must become pro-active in pursuing tourism investment, diversify and upgrade the tourism product/experience, and become recognized leaders in strategic tourism marketing.

6.6 The Economic Impacts

Tourism spin-off expenditures and jobs are the dollars spent and number of jobs created as a result of visitors’ spending. The following analysis is performed using IBI Group’s in-house economic model as well as the Ontario Ministry of Tourism’s TREIM model. Assumptions on average spending and number of overnight visitors are based on information collected from a Visitor Intercept Survey conducted by IBI Group in the summer of 2007.

IBI Group’s in-house economic model shows that based on two million visitors to Wasaga Beach and focusing on overnight visitors only, our assumptions on spending suggest an approx. $90 million in direct spending generated for the local and regional economy. Using an indirect and induced multiplier of 0.18, this translates...
into just under $16 million in indirect and induced spending. The total direct, indirect and induced spending is approx. $106 million. This estimate excludes accommodation costs based on the question contained in the beach survey which asked respondents to state total trip expenditure per person net of accommodation costs. Expenditure is not limited to the Town, but can occur elsewhere in the region depending on the visitor and activities undertaken.

**Exhibit 6-4**

**Estimated Local Spin-Off Spending in Wasaga Beach**

<table>
<thead>
<tr>
<th>Estimated total number of visitors to Wasaga Beach</th>
<th>2,000,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Local Visitors</td>
<td></td>
</tr>
<tr>
<td>- Overnight Trips $^1$</td>
<td></td>
</tr>
<tr>
<td>Average Spending Per Person $^1, ^2$</td>
<td>46%</td>
</tr>
<tr>
<td>- Non-Local (Overnight)</td>
<td></td>
</tr>
<tr>
<td><strong>Total Potential Direct Spending</strong></td>
<td></td>
</tr>
<tr>
<td>Expenditure in Wasaga Beach</td>
<td>$89,867,340</td>
</tr>
<tr>
<td>Indirect and Induced Impact $^3$</td>
<td>Multiplier</td>
</tr>
<tr>
<td>Potential Multiplier Impact (Indirect and Induced)</td>
<td>0.1774</td>
</tr>
<tr>
<td>Expenditure Arising from Indirect and Induced Expenditure</td>
<td>$15,942,466</td>
</tr>
<tr>
<td><strong>Total Direct, Indirect and Induced</strong></td>
<td>$105,809,806</td>
</tr>
</tbody>
</table>

**Notes:**

1 Based on Intercept Survey conducted by IBI Group in summer of 2007  
2 Average spending excludes accommodations  
3 Based on Statistics Canada, Industry Accounts Division,  
   2003 Provincial Input-Output Multipliers Ontario

As a sensitivity analysis, the same in-house model was applied using spending data from the Ministry of Tourism’s 2005 Regional Tourism Profile for Simcoe County. The average overnight expenditure is $79 per person per night. The potential direct, indirect and induced expenditure is just under $8.6 million.
Exhibit 6-5

Estimated Local Spin-Off Spending in Wasaga Beach

<table>
<thead>
<tr>
<th>Estimated total number of visitors to Simcoe County</th>
<th>2,000,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Local Visitors</td>
<td></td>
</tr>
<tr>
<td>- Overnight Trips(^1)</td>
<td>46%</td>
</tr>
<tr>
<td>Average Spending Per Person(^1)</td>
<td></td>
</tr>
<tr>
<td>- Non-Local (Overnight)</td>
<td>$79</td>
</tr>
<tr>
<td>Total Potential Direct Spending</td>
<td></td>
</tr>
<tr>
<td>Expenditure in Wasaga Beach</td>
<td>$72,838,000</td>
</tr>
<tr>
<td>Indirect and Induced Impact(^2)</td>
<td>Multiplier</td>
</tr>
<tr>
<td>Potential Multiplier Impact (Indirect and Induced)</td>
<td>0.1774</td>
</tr>
<tr>
<td>Expenditure Arising from Indirect and Induced Expenditure</td>
<td>$12,921,461</td>
</tr>
<tr>
<td>Total Direct, Indirect and Induced</td>
<td>$85,759,461</td>
</tr>
</tbody>
</table>

Notes:

1 Based on Ministry of Tourism, Regional Tourism Profiles, 2005 for Simcoe County
2 Based on Statistics Canada, Industry Accounts Division, 2003 Provincial Input-Output Multipliers Ontario

TREIM Model

The Ministry of Tourism has a Tourism Regional Economic Impact Model (TREIM) that provides a wide array of economic impacts based on tourist spending. TREIM is a dynamic input-output model that projects direct, indirect and induced economic impacts of tourism activities. Direct impacts are the initial impacts for the spending of overnight visitors in Wasaga Beach, which is the input to the model. The direct impacts will create iterative rounds of income and impacts called indirect or induced impacts. The ripple effect through the economy can be measured in a number of ways, e.g. jobs, taxes, spending, etc. The following output from the TREIM model is based on impacts at the regional level, (Simcoe County) from overnight spending in Wasaga Beach based on the results of our intercept survey.
Based on a total visitor spending of approximately $90,000,000 per year, about $60,000,000 of Gross Domestic Product (GDP) would be generated in Simcoe County. The labour income generated is approximately $29,000,000, creating over 700 direct jobs, and about 180 indirect and induced jobs in the region. Estimated direct municipal taxes (assuming to be property taxes) generated in Simcoe County is about $600,000, in addition to approximately $24,600,000 generated for both the provincial and federal taxes.
### Exhibit 6-6: TREIM Model

<table>
<thead>
<tr>
<th>TREIM MODEL*</th>
<th>Simcoe County</th>
<th>Rest of Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Visitor's Spending</strong>&lt;sup&gt;1&lt;/sup&gt;</td>
<td>$90,000,000</td>
<td></td>
</tr>
<tr>
<td>Gross Domestic Product (GDP)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct</td>
<td>$43,000,000</td>
<td>$5,000,000</td>
</tr>
<tr>
<td>Indirect</td>
<td>$6,000,000</td>
<td>$7,000,000</td>
</tr>
<tr>
<td>Induced</td>
<td>$11,000,000</td>
<td>$9,000,000</td>
</tr>
<tr>
<td>Total</td>
<td>$60,000,000</td>
<td>$21,000,000</td>
</tr>
<tr>
<td><strong>Labour Income</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct</td>
<td>$20,000,000</td>
<td>$3,000,000</td>
</tr>
<tr>
<td>Indirect</td>
<td>$3,000,000</td>
<td>$4,000,000</td>
</tr>
<tr>
<td>Induced</td>
<td>$6,000,000</td>
<td>$5,000,000</td>
</tr>
<tr>
<td>Total</td>
<td>$29,000,000</td>
<td>$12,000,000</td>
</tr>
<tr>
<td><strong>Employment (Jobs)</strong>&lt;sup&gt;2&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct</td>
<td>710</td>
<td>70</td>
</tr>
<tr>
<td>Indirect</td>
<td>70</td>
<td>85</td>
</tr>
<tr>
<td>Induced</td>
<td>110</td>
<td>105</td>
</tr>
<tr>
<td>Total</td>
<td>890</td>
<td>260</td>
</tr>
<tr>
<td><strong>Direct Taxes</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal</td>
<td>$13,000,000</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Provincial</td>
<td>$11,000,000</td>
<td>$400,000</td>
</tr>
<tr>
<td>Municipal</td>
<td>$600,000</td>
<td>$85,000</td>
</tr>
<tr>
<td>Total</td>
<td>$24,600,000</td>
<td>$1,485,000</td>
</tr>
</tbody>
</table>

* Number are rounded

<sup>1</sup> Based on Intercept Survey conducted by the IBI Group in the summer of 2007; Total Overnight Visitors' Spending in Wasaga Beach

<sup>2</sup> Includes Full-time, Part-time, seasonal, employed & self-employed