



TOURISM DESTINATION MANAGEMENT PLAN

August 2018

BRAIN TRUST
MARKETING & COMMUNICATIONS

Acknowledgments

The Town of Wasaga Beach (WB) has invested in a Tourism Destination Management Plan (TDMP) with a three to five-year outlook. We acknowledge, with thanks, the participation of numerous stakeholders who participated in the interview and consultations process and provided valuable input that helped shape this plan (a list of these individuals are found in Appendix A).

We also benefited from the dedication and leadership demonstrated by the Town of Wasaga Beach, Tourism Simcoe County and Regional Tourism Organization 7 (BruceGreySimcoe) including:

- Andrew McNeill, Director of Economic Development and Tourism, WB
- Johanna Griggs, Economic Development Officer, WB
- Ellen Timms, Economic Development Officer, WB
- Kathryn Stephenson, Manager, Tourism Simcoe County
- Bill Sullivan, Chief Executive Officer, RTO7
- Alex Hogan, Project & Administration Manager, RTO7

We would also like to acknowledge the work of the TDMP Steering Committee and Working Group (a list of these individuals are found in Appendix A).

The Town of Wasaga Beach would like to acknowledge the financial assistance provided by the Ontario Ministry of Tourism, Culture and Sport, RTO7, and Tourism Simcoe County to undertake this project.



BRAIN TRUST would like to express our appreciation to all whose knowledge and expertise contributed to the process which led to the findings and recommendations contained in this report. August 2018.



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Abbreviations

B&B	Bed and Breakfast
BIA	Business Improvement Area
DMO	Destination Marketing or Management Organization
F&B	Food and Beverage
JMA	Joint Marketing Agreement
MOU	Memo of Understanding
OMTCS	Ontario Ministry of Tourism, Culture and Sport
RTO	Regional Tourism Organization
RV	Recreational Vehicle
SUP	Stand Up Paddleboard
TDMP	Tourism Destination Management Plan
VFR	Visiting Friends and Relatives

1. Executive Summary

The Wasaga Beach Tourism Destination Management Plan (TDMP) comes at a time when the Town is poised to embark on an exciting and anticipated period of growth and development. In that context, the TDMP is designed to provide a strategy for positive and responsible economic prosperity through tourism development. The TDMP is Wasaga Beach’s roadmap for success.



Through a consultative process with tourism stakeholders, the Town of Wasaga Beach, the TDMP consultant facilitated a series of Discovery Sessions, one-on-one interviews and group meetings to understand the needs of tourism stakeholders and to validate the observations and findings identified through the planning process. (Chapter 3)

To capitalize on the growth of tourism worldwide, the TDMP is built on a tourism destination management model that suggests tourism destination management is *“a continuous process of understanding, coordinating, investing, developing and marketing the tourism potential of a destination in ways that provides value to visitors, communities and businesses.”*

Make Shift Happen. In the context of effective destination management (Chapter4), tourism stakeholders within WB will move from “supply-side” thinking (listing the tourism assets as places to go and things to do) to “demand side” thinking (creating an invitation to come, discover, and engage). To make a shift to a visitor-centric approach, it is important to shift from focusing on what there is for visitors to do in Wasaga Beach, to answer these questions – What experiences are our ideal guests seeking, how can we deliver unforgettable experiences, what can we offer the ideal guest that is uniquely ours and how do we layer on engagement and emotion?

A thorough review of the tourism landscape on a global, national, provincial, regional, and Wasaga Beach specific basis was completed. (Appendix D)

A tourism asset assessment was also completed (Chapter 5). This assessment captured the majority of WB tourism assets and was conducted through a visitor’s lens, in that it utilized tools used by visitors to explore things to see and do and to locate a tourism business. The review included online searches, viewing visitor guides and community business directories. The assessment helped determine, among other things, tourism market readiness.

Ensuring a clear understanding of the ideal guests, i.e., those who are willing to take a trip to experience what is offered is the second part of the equation and completes the process. For this reason, the WB ideal guests were identified (Chapter 6) using the Destination Ontario market segmentation study.

They include:

- Family Memory Builders
- Nature Lovers
- Up and Coming Explorers

Eighteen overarching findings led to the identification of 18 recommendations (Chapter 7). These recommendations are supported by a series of actions and who has the role and responsibility for undertaking each action. Recommendations also include performance metrics to track and measure successful implementation.

The planning assumption includes an approach that manages expectations and accepts the realities regarding capacity/capabilities of the Town and its tourism partners and stakeholders.

Recommendations have adopted a phased approach and are developed for the;

- Immediate-term – 2019
- Medium-term – 2020/2021
- Long-term – 2022/2023

Recommendations Immediate-Term 2019

1. Tourism operators must come together to understand, embrace and be engaged participants in collectively supporting the implementation of the TDMP.
2. Create an industry-led Tourism Advisory Committee (TAC) – a standing committee of Council whose mandate is to ensure tourism activities are aligned with the TDMP.
3. Create the Wasaga Beach Tourism Alliance whose participants accept and adhere to a list of quality/service imperatives and agree to develop and deliver exceptional experiences.
4. Based on skills required for tourism management and oversight* realign the Town's organizational structure and expand the staff complement to expedite the tourism initiatives identified in the TDMP.
*(Industry relations, product/experience development, events/programming, beach property management, marketing)
5. Continue to deliver tourism industry training – grow participation by encouraging operators to leverage programs offered at the regional, county, local level and recognize operators who take steps to enhance their tourism market readiness.
6. Tourism operators must enhance their online presence – websites, online listings, social media and TripAdvisor, to ensure potential customers see appealing content and mechanisms to purchase/reserve.
7. Encourage operators to develop and deliver experiences that connect visitors to the Outdoor Adventure/Recreation narrative.
8. Transition visitor information services by evaluating current/future visitor behaviour and advancements in digital technology and online information services.
9. Create a transitional marketing plan that increases annually to support new branding, enhanced tourism activities, events, experiences, and Main Street/Beachfront development.
10. Continue to engage senior staff at Wasaga Beach Provincial Park/Ontario Parks as they complete the WB Park Management Plan, providing input to ensure plan includes steps to address opportunities identified in the TDMP.

Recommendations Medium-Term 2020/2021

11. Introduce a Municipal Accommodation Tax (MAT) for ALL transient accommodations in Wasaga Beach.
12. Take proactive steps to increase day-trip visitor spending.
13. Develop a tourism Events Strategy that supports attracting the right people at the right time – maximize return on investment by using the events classification criteria to guide the decision process/action.
14. Use existing TOWB façade improvement program and new public funding for tourism business upgrades and enhancements.
15. Introduce quality/service imperatives for the accommodation sector that go beyond fire and safety/licensing standards – create a mechanism for the sector to self-regulate compliance with these imperatives.
16. Using the NEW Outdoor Adventure/ Recreation narrative take steps to grow visitation in May/June, September/October, January/February by developing, marketing and delivering new outdoor experiences, events and programming (see Recommendation #7).

Recommendations Long-Term 2022/2023

17. Create mechanisms to track tourism performance at the community/local level, including accommodation occupancy, visitation, spending
18. Address basic infrastructure gaps that are negatively impacting the visitor's journey.

Successful implementation of the recommendations will require dedication, focus, and commitment over the long-term. It will require all involved to understand the up-side opportunities of effective destination management. Operators must understand and engage in development and promotional activities in their own business.



Wasaga Beach

2. Introduction

Through the RFP process, Brain Trust Marketing and Communications were contracted in April 2018 to work with TOWB staff, WB tourism stakeholders, Tourism Simcoe County, RTO7 and other partners to develop the plan.

Through initial dialogue with staff and a clearer understanding of the current situation within WB, Brain Trust concluded that what WB needed was a Tourism Destination Management Plan (TDMP). It was agreed, by developing a WB TDMP, the TOWB and its tourism stakeholders and partners would have a 5-year roadmap detailing the strategies and actions to be collectively undertaken to enhance the awareness, competitiveness and appeal of WB and grow tourism visitation and revenues.

Tourism Destination Management is a continuous process of understanding, coordinating, investing, developing and marketing the tourism potential of a destination in ways that provides value to visitors, communities and businesses.¹

Destination management happens when tourism organizations, industry stakeholders and governments, be they municipal, regional, provincial or national, plan and work together to enhance the quality of the visitor's experience by ensuring tourism products, services, and amenities exceed visitor expectations.

The WB TDMP has been developed to enhance the competitiveness and appeal of Wasaga Beach over the next five years. By undertaking this process and implementing the recommendations identified in the plan, the TOWB and its tourism stakeholders will strengthen their ability to increase the benefits from tourism.

Successful destination management supports two primary revenue drivers – supply and demand. Destination development focuses on the supply side by creating compelling visitor experiences to attract new visitors and entice repeat visitation. Destination marketing strives to generate short-term demand and create immediate urgency for people to want to visit. Proactive destination management brings together strategies and tactics designed to:

- Ensure that a destination is well positioned to make future strategic decisions;
- Address impediments to growth while capitalizing on opportunities;
- Outline key assets, including the main product themes/experiences available, and;
- Outline priorities for the product, infrastructure, amenity and experience development.

¹ Brain Trust Marketing & Communications, 2015

3. Wasaga Beach TDMP Planning Process

To achieve the goals of the plan an extensive planning and development process was followed. The steps included:

1. Project Kick-off Session with the TDMP Steering Committee – April 3
 - a. Affirm project outcomes and validate the development process, including:
 - i. Review the project methodology
 - ii. Tourism Development vs. Destination Management – discuss, validate
 - iii. Destination Overview, recent successes, challenges
 - iv. Current Roles/Responsibilities
2. Review reports, plans and studies about the destination/region
3. Complete tourism asset assessment – review/validate with project leads
 - a. A desk-based online review of all tourism businesses/organizations within the destination
4. Stakeholder face-to-face and telephone interviews (see Discussion Guide in Appendix B) – 22 interviews held April 30th – July 26th
 - a. Forty-five to sixty-minute face-to-face and telephone interviews with an identified list of tourism owner/operators, senior/general managers, municipal staff, elected officials that provided an opportunity for the consultant to get first-hand impressions from stakeholders on a variety of topics about the destination
5. Working Group (see Mandate in Appendix C) Project Launch Session – April 30th
 - a. Affirm project outcomes and validate the development process, including:
 - i. Review the project methodology
 - ii. Tourism Development vs. Destination Management – discuss, validate
6. Town of Wasaga Beach Department Heads Project Launch Session – May 25th
 - a. Affirm project outcomes and validate the development process, including:
 - i. Review the project methodology
 - ii. Tourism Development vs. Destination Management – discuss, validate
7. Industry/Public Launch Session – May 28th
 - a. Affirm project outcomes and validate the development process, including:
 - i. Review the project methodology
 - ii. Tourism Development vs. Destination Management – discuss, validate
 - iii. Receive input from stakeholders – expectations WB will strive for in the future
8. Present Findings/Observations to Steering Committee – June 4th
 - a. This session provided an opportunity to discuss findings and observations learned through the above steps and to provide understanding, input and validation of initial findings
9. Present Findings/Observations to the Working Group – June 11th
 - a. This session provided an opportunity to discuss findings and observations learned through the above steps and to provide understanding, input and validation of initial findings
10. Industry/Public Findings/Observations Session – June 14th
 - a. This session provided an opportunity to discuss findings and observations learned through the above steps and to provide understanding, input and validation of initial findings
11. Present DRAFT Recommendations to Steering Committee for input/validation – July 6th
12. Present DRAFT Recommendations to Working Group for input/validation – July 16th
13. Present DRAFT Recommendations to Industry/Public for input/ validation – July 23rd

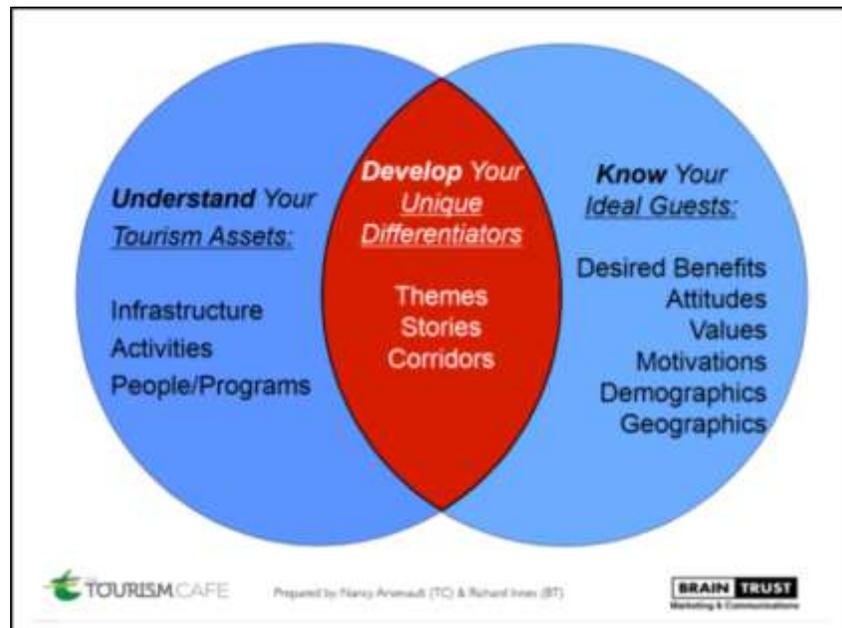
4. Visitor-Centric Tourism Destination Management Defined

Traditional tourism management, development and promotion call for identifying any number of tourism assets, organizing them in a purchasable manner and then “putting them on the shelf” to hopefully be consumed by potential customers. This is “supply side” tourism management/marketing.

The customer-centric process examines the tourism assets through the visitor’s lens; a “demand side” approach. It asks tourism stakeholders to think about the tourism assets in consideration of their ideal guests. By understanding the benefits travellers are seeking, combined with their attitudes, values, the motivation for travel and their demographic profile, businesses and destinations are in a stronger position to evaluate the alignment of their identified assets against the backdrop of what the customer wants. By applying this understanding, the Wasaga Beach unique differentiators or demand generators emerge and articulate the destination’s “narrative” or story. The Unique Tourism Differentiator Model articulates the components of visitor-centric tourism development and marketing.

Figure 1: Unique Differentiator Model²

Tourism development and marketing involves many players, from individual tourism operators to national, provincial, regional organizations. It’s common for the customer to get lost between organizations, mandates, and priorities. Further, while excellent research is available, the application of this knowledge into the daily operations of individual businesses is less common. Visitor centric tourism development is a process that streamlines information and synchronizes efforts around more tangible objectives, thus making it easier for organizations to collaborate and leverage resources and assets present in the destination to grow tourism visitation and revenues.



² Nancy Arsenault, The Tourism Café, Richard Innes, Brain Trust Marketing & Communications.

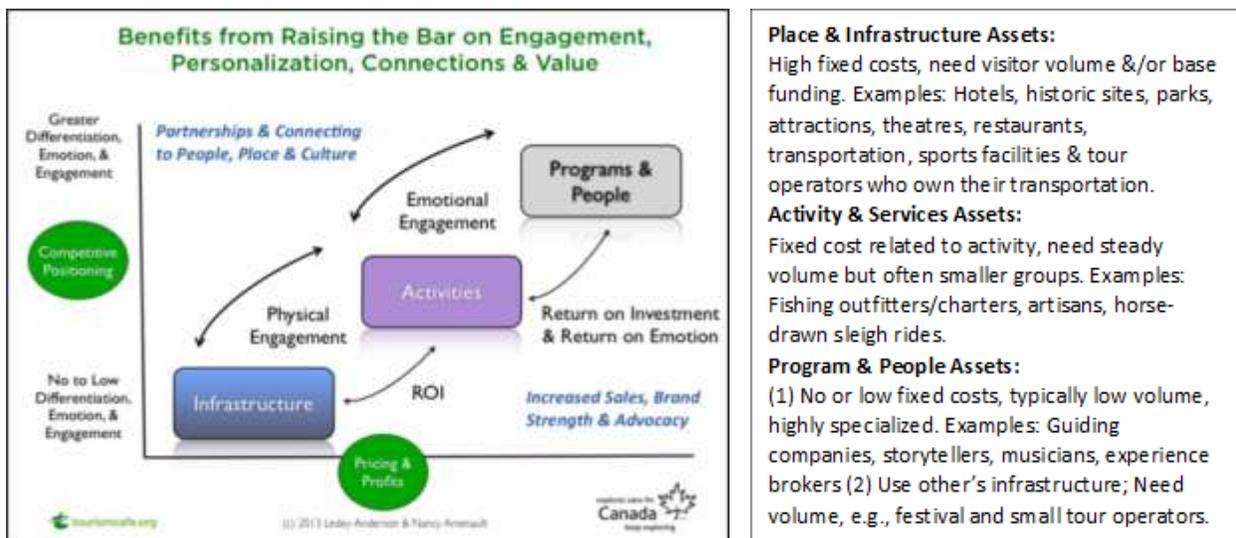


Figure 2: Raising the Bar Model³

Creating memorable travel experiences, engaging activities, and effectively managing built and natural infrastructure is essential to raising the bar on competitive appeal, pricing, profits and value. This thinking is based on a destination having a range of travel assets from undifferentiated, low emotion and engagement (e.g. a beach, trail, and museum), to those that connect emotionally with visitors to differentiate themselves and influence price point (e.g. storyteller, musician, festival/event or interpretive guide). All these elements must be in the mix. See Raising the Bar model (Fig. 2)

To make the shift to a visitor-centric approach, it is important to shift from merely focusing on what there is for visitors to do, to who is, and what are the characteristics of the “ideal guest.” The shift requires consideration and answers to relevant questions such as:

- What benefits are our ideal guests seeking?
- How do we deliver unforgettable experiences?
- What can we offer the ideal guest that is uniquely ours?
- How do we layer on engagement and emotion?

Understanding the competitive set becomes less important once you understand the current and potential unique differentiators in the context of your ideal guest. By focusing development and marketing around these key differentiators WB and its tourism operators have an opportunity to target their ideal guests with compelling reasons to visit and visit again.

³ Nancy Arsenault, Lesley Anderson, The Tourism Café Canada.

5. Wasaga Beach Tourism Asset Assessment Summary

An assessment of the tourism assets that are present in Wasaga Beach was conducted. This step helps define what WB offers relative to the infrastructure, activities and programs and people-based businesses that visitors can experience. (see Figure 2, Raising the Bar Model, page 10).

Using an Asset Assessment Template, tourism businesses were identified and listed under a variety of asset sectors. The compilation of this assessment provides clarity to determine the greatest opportunities for immediate growth and where there is potential for tourism development that leads to future growth.

The Asset Assessment Template was completed using on-line, desk-based research methodology because that is how prospective visitors would explore and search the destination for things to see and do and places to sleep and dine.

The chart on page 12 is a summary of the asset assessment. It is a roll-up of the tourism assets found in the destination. The detailed charts that follow provide further specifics for each sector of the tourism industry within Wasaga Beach.

THE ASSET ASSESSMENT IS NOT AN INVENTORY OF ALL ASSETS, BUT A LIST OF THOSE EASILY FOUND THROUGH ONLINE CONSUMER-BASED SEARCH TACTICS.

	INFRASTRUCTURE / PLACE BASED ASSETS	ACTIVITY / SERVICE BASED ASSETS	PEOPLE / PROGRAM BASED ASSETS
TYPICAL BUSINESSES	Hotels, historic sites, parks, trails, human-made attractions, theatres, restaurants, retail, transportation options, sports venues/facilities.	Outdoor adventure outfitters, canoe/kayak/SUP/PWC/cross country ski rentals, artisans (instruction), dog-sled/horse-drawn sleigh rides.	Guiding companies, storytellers, musicians, festivals/events, interpretive guides, receptive tour operators.
CHARACTERISTICS	High fixed costs/capital and need visitor volume or base funding (subsidies) to be sustainable.	Fixed/low cost related to activity, need steady volume but often lower numbers to be sustainable.	No or low fixed costs, typically low volume, highly specialized, use other's infrastructure/assets, Charge higher per-person prices and less volume.
WASAGA BEACH ASSETS	<p>There are 375* infrastructure/place-based assets including:</p> <ul style="list-style-type: none"> • 94 roofed accommodations • 7 camping/RV park • 148 private rental accommodations • 61 restaurants • 32 unique retailers • 1 agri-culinary assets • 14 nature/outdoor based assets • 9 culture/heritage assets • 4 spas 	<p>There are 21* activity-based assets including:</p> <ul style="list-style-type: none"> • 3 golf courses • 3 miniature golf courses • 7 summer waterfront activities (kayaking/canoeing, SUP, personal watercraft, fly-boarding, boat rentals) • 2 tennis courts • 3 cross country ski/snowshoe trails • 1 of each of the following: batting cages, caving/climbing, driving range, go-carting, hand-racing, skateboard park, outdoor skating, skydiving, paintball, snowmobiling, yoga 	<p>There are 24* program/people-based assets.</p> <p>This includes 22 festivals/events and two program-based assets (outfitters who deliver programming).</p>

* Some assets fit more than one category. Not all asset categories are shown in the chart above. More details are provided in the sections that follow.

INFRASTRUCTURE/PLACE-BASED ASSETS

The infrastructure-place based category includes many of the typical assets that one would associate with tourism. While these are positioned low regarding the level of engagement, personalization, connections and value, they are essential foundations of a visitor destination. The tables that follow provide a snapshot of the assets that fall into the infrastructure/place-based category.

TRADITIONAL ACCOMMODATIONS

Accommodations are an essential part of tourism infrastructure as they provide the home away from home for the visitor and allow visitors to stay longer in the area and spend more money.

Category	Total # Of Properties	# Of Rooms /Sites	Seasonal	Permanent
Hotel / Motel	23	579	13	10
B&B	9	21	0	9
Inn	1	4	1	0
Cottages/Cabins	61	443	32	29
RV Parks and Campgrounds	7	1194	6	1
Total Number of properties etc.	101	2241	51	50

ACCOMMODATION RATE COMPARISON

To understand rates roofed accommodations charge within the region we conducted a review of comparable properties in Wasaga Beach, Collingwood/Blue Mountains, Barrie and Simcoe County. We looked at similar types/styles of properties in each destination on select dates in July and August. The review was conducted from June 12 – 15 using Booking.com, TripAdvisor and Airbnb websites.

	Mid-week \$ July 25,26 1 night	WKND \$ July 27, 29 2 nights	Mid-week \$ Aug 14, 15 1 night	WKND \$ Aug 24, 26 2 nights	AVG \$ RATE MID-WEEK	AVG \$ Rate WKND	TripAdvisor Rating + # of Reviews
WB Hotel	\$302	\$495	\$212	\$495	\$257	\$495	4.5 - 155
WB Hotel	\$145	\$420	\$145	\$420	\$145	\$420	2.5 - 55
WB Motel	\$150	\$340	\$160	\$340	\$155	\$340	3.0 - 26
WB Motel	\$109	\$278	\$109	\$278	\$109	\$278	2.5 - 13
WB Cottage Court	\$209	\$430	\$209	\$418	\$209	\$424	4.5 - 46
WB Cottage Court	\$935	\$645	\$935	\$645	\$935	\$645	0 - 0
WB AIRBNB	\$392	\$558	\$412	\$539	\$402*	\$548*	
Collingwood/Blue Hotel	\$229	\$452	\$229	\$388	\$229	\$420	4.0 - 1335
Collingwood/Blue Hotel	\$152	\$261	\$152	\$266	\$152	\$263	3.5 - 417
Collingwood/Blue Motel	\$78	NA	\$78	NA	\$78		3.0 - 27
Collingwood/Blue Motel	\$80	NA	\$80	NA	\$80		2.5 - 3
Collingwood/Blue Condo	\$169	\$275	\$169	\$280	\$169	\$277	4.5 - 26
Collingwood/Blue Condo	\$230	\$305	\$230	\$305	\$230	\$305	4.0 - 225
Collingwood/Blue AIRBNB	\$432	\$616	\$457	\$587	\$445*	\$601*	
Barrie Hotel	\$80	\$318	\$80	\$278	\$80	\$298	3.0 - 848
Barrie Hotel	\$80	\$166	\$80	\$166	\$80	\$166	2.5 - 252
Barrie AIRBNB	\$347	\$365	\$349	\$379	\$348*	\$372*	
Simcoe County Resort	\$159	\$408	\$159	\$398	\$159	\$403	3.5 - 1663
Simcoe County Resort	\$272	\$440	\$179	\$650	\$175	\$545	4.0 - 199
Simcoe County AIRBNB	\$368	\$492	\$390	\$492	\$372*	\$496*	

The comparison revealed that in most cases WB accommodators charge more for all property types on the dates researched.

PRIVATE RENTAL ACCOMMODATIONS

Like many destinations worldwide, non-traditional/private home/cottage/room rentals are popular options for those looking for less expensive or unique accommodations options. The following is a snapshot of the types of accommodations currently available in Wasaga Beach through Airbnb, VRBO, and Cottages in Canada, which are 3 of the most popular non-traditional booking websites.

There is a total of 148 private rental listings. Some owners will utilize more than one booking site to list their property.



Airbnb – 80 Listings

Cottages/Houses (listings are by number of beds not number of bedrooms)

Size of Cottage/Home	Total # Of Properties	Price Range Per Night
1 Bed	3	\$103 - \$170
2 Beds	18	\$119 - \$299
3 Beds	14	\$111 - \$219
4 Beds	13	\$164 - \$391
5 Beds	9	\$269-\$529
6+ Beds	23	\$96-\$723
Total	80	

VRBO– 48 Listings

Cottages/Houses (listings are by the number of properties)

Size of Cottage/Home	Total # Of Properties	Price Range Per Night
2 Bedroom	22	\$82- \$278
3 Bedroom	11	\$87 - \$279
4 Bedroom	11	\$128 -\$430
5 Bedroom	2	\$209 - \$411
6+ Bedrooms	2	\$272 - \$290
Total	48	



Cottages in Canada – 20 Cottage Listings

Total # Of Properties	Price Range Per Week
20	\$700 - \$3,450

KEY FINDINGS

- There is a wide variety of accommodation options within Wasaga Beach (249). Accommodations range from traditional hotels, motels, cottage courts and B&Bs. There is a high concentration of non-traditional accommodation (148) options available through three primary websites.
- Wasaga Beach has a variety of accommodation options that are available throughout the year at a range of price points. There is only one branded property (Travel Lodge).
- There are “other” vacation properties listed for rent by real estate agents/companies <http://www.ronpuccini.com/index.php?action=display&cat=13&v=>
- We learned some accommodation properties are made available for short-term or temporary housing, and therefore taken out of inventory at certain times of the year (off-season) or annually depending on demand.

- There is an equal split of traditional accommodation properties that operate year-round vs. seasonally.
- While accommodation stats are not kept we understand occupancy to be very strong in the summer months (80+%), perhaps not as strong as it once was, but still creating a situation where most properties are filled on summer weekends. Room occupancy is reported to drop outside the months July and August with occupancy reported to be below 50% November – March.
- Average daily rate (ADR), while not recorded, appears to be above market rates, especially in the summer months and on holiday weekends (see Rate Comparison Chart).

FOOD & BEVERAGE – DINING ASSETS

Category	Total # Of Properties
Catering	1
Chinese	3
Thai	1
Family/Casual	23
Fine Dining	2
Fast food	14
Ice Cream Shop	7
Coffee Shops	2
Pubs/Lounges/Bars	8
Total	61

Seasonality	
Seasonal	46%
Permanent	52%

Dining Options Promoted	Total # Of Properties
Accredited Chef	1
Vegetarian	2
Vegan	3
Gluten Free	2
Heart Healthy	1
Local foods/beverages (from region)	0
Child Menu	3
Seniors Portions	0

Key Findings

- The majority of Wasaga Beach’s dining options are casual/family dining and fast food.
- Most of the branded fast food chains can be found here.
- Only two restaurants are promoting fine dining with an accredited chef.
- 46% of the dining establishments are seasonal.
- Most establishments are located within walking distance, a short drive, or on the beach.

RETAIL ASSETS

Like any destination, retail establishments are important to the tourism industry.

Category	Total # Of Properties
Beach area retail – clothing	14
Candy/snack store/specialty	6
Gift shop/novelties	12
Total number of properties	32

Seasonality	
Seasonal	44%
Permanent	56%

Key Findings

- There are unique retailers in Wasaga Beach that cater predominantly to the existing visitor market.
- Many retailers are located on or in close walking distance to Beach Area 1.
- There are limitations to the retail offering with many shops carrying beachwear and beach accessories, novelties and gifts/souvenirs.
- There are big box stores located in Wasaga Beach.

CULTURE AND HERITAGE BASED ASSETS

Cultural based infrastructure includes venues that are often unique to a destination and showcase the character of a place – its people, their history and the landscape that shapes them.

Category	Total # Of
Art Murals	1
Studios	4
Performing Arts	3
Museum or Historical Attraction	1
Total Number of properties	9

Seasonality	
Seasonal	56%
Permanent	44%

Key Findings

- There is a limited number of culture and heritage-based assets and attractions.
- Music performances are featured in the Beach One market area and at the RecPlex on Tuesday evenings throughout the summer months.
- Nancy Island Historic Site is in the heart of Wasaga Beach and is the primary heritage attraction.
- Anecdotally we learned some artisans live and practice their craft in Wasaga Beach.

NATURAL ASSETS AND TRAILS

Nature-based assets and trails provide visitors with a backdrop to enjoy a variety of activities.

Category	Total # Of Assets
Beaches	8
Provincial park	1
Total Number of Assets *	9

Key Findings

- There are eight identified beach sections along 14km of shoreline in Wasaga Beach. Each section offers different features and amenities for visitors including such things as:
 - Swimming, picnic areas, bike paths, boardwalks, parking, washrooms, boat launches, fishing platforms, mobi-mats and wheel chairs (for those with mobility challenges), playgrounds, dog beach, and a kiteboard launch area.
- There are six defined trails in Wasaga Beach and most of these inter-connect and some link to the bike paths/boardwalks listed at the beach sections.
- Trails provide hiking opportunities on the six trails as well as at 2 of the beaches on the boardwalks
- Mountain biking is available on 2 of the trails as well as at 5 of the beaches on the bike paths.
- Cross-county skiing is available in one of the Provincial Parks; the trail is groomed/track-set.
- Oakview Woods Sports Complex – Outdoor rink, four tennis courts, BMX/skateboard Park, Gazebo, Dog Park, pathways, accessible play structure, bay swing seat, spring toy, benches

SPAS

Category	Total # Of Assets
Day Spas	4

Key Findings

- Although there are nine listings associated with spas, only four appear to be day spas that would cater to the visitor market offering massage therapy and aesthetics rather than only hair services.

AGRI-CULINARY ASSETS

Agri-culinary tourism includes any tourism experience in which one learns about, appreciates, and consumes food and drink that reflects the local, regional, or national cuisine, heritage, culture, tradition or culinary techniques.⁴

Category	Total # Of Properties
Farmers Market	1

⁴ Ontario's Four-Year Culinary Tourism Strategy and Action Plan 2011-2015

Key Findings

- The seasonal farmers market is the only agri-culinary asset in Wasaga Beach. It operates from May 29 to September 25, 2018, from 4 pm-8 pm.

VISITOR INFORMATION SERVICES

	Wasaga Beach Chamber of Commerce	Chamber Kiosk Beach One	Nancy Island Welcome Centre	Visit South Georgian Bay (GTTA)
Open Year Round	1	-	-	1
Open High Season Only (Jun-Sep)	-	1	1	-
# Full time year-round staff	1	-	-	3
# Part time and seasonal staff	1.5	1.5	1	3
Number of visitors annually	5,600	2,400	TBD	12,500
Washroom	1	1	1	1
Wi-Fi	1	0	0	1
Distribute Print Info	1	1	1	1
Video viewing area	0	0	0	1
Gift Shop/Retail	0	1	1	1
Picnic Area	1	1	1	1
Able to purchase food	0	1	0	0
Display/artefacts available	0	0	1	1
Computer available for guests	0	0	0	0
A place to plug in and charge	1	1	1	1
Communicate via Twitter	1	1	0	1
Communicate via Facebook	1	1	1	1
Make bookings/reservations	0	0	0	0

Key Findings

- With one year-round VIC (operated by the Chamber) visitors have access to information during regular business hours.
- This service is supplemented with seasonal VICs located in primary visitor areas.
- All VIC have public washrooms.
- The year-round VIC offers free WI-FI.
- Given the large volume of people who visit Wasaga Beach, especially in the summer months, a small number use the services of the VICs.
- None of the VICs make accommodation reservations or attraction bookings.

ACTIVITY-BASED COMPANIES

Activity-based assets are often trip motivators for visitors. 21 activity assets were assessed in Wasaga Beach.

Category	Total # Of Assets
Batting Cages	1
Boat Rentals	1
Canoeing and Kayaking	2
Caving and Climbing	1
Cross Country Skiing	1
Driving range	1
Fly-boarding	1
Go-carts	1
Golfing	3
Hand Racing	1
Hiking and Walking	1
Ice Fishing	1
Indoor Playground	1
Mini-golf	3
Paintball	1
Outdoor Playground	2
Personal Water Device	1
Skateboard Park	1
Skydiving	1
Snowmobile	1
Snowshoeing	2
Stand-Up Paddle Board	2
Tennis Venues	2
Winter Outdoor Skating	1
Yoga on the Beach	1
Total Number of Assets *	21

- * Some businesses have assets that fit into more than one category.

Key Findings

- There are three golf courses in Wasaga Beach as well as three miniature golf courses and one driving range.
- The waterfront at Wasaga Beach offers opportunities for outdoor water-based activities (kayaking/canoeing, SUP, personal watercraft, fly-boarding, and boat rentals).
- There are several other unique activity options including skydiving, go-carting, and paintball.
- Several companies facilitate activity-based opportunities – they rent equipment or offer expertise to participate in the activity

- Two outdoor adventure outfitters offer some services from an experienced guide or instructor, and they use the natural assets found in Wasaga Beach to support these visitor experiences (guided hikes/paddling experiences, paddle board/kayak lessons etc.)

PROGRAMS AND PEOPLE-BASED COMPANIES

Program and People-Based assets are positioned highest in the level of engagement, personalization, connections and value – they are what make Wasaga Beach come alive. Festivals emphasize the uniqueness of the area and often celebrate the history and culture that is unique to the host community. Programs and people assets, such as artists, storytellers, musicians and guides are what make a visitor’s experience memorable and personal.

FESTIVALS AND EVENTS

In Wasaga Beach, 23 festivals/events were identified. Some events fall in more than one category.

Category	Total # Of Assets
Cultural Experience	1
Historical Cultural	2
Music	5
Performing Arts	1
Sports Recreation	7
Winter Festivals Events	4
Other	6

Event Classification	Total # Of Assets
Tourism Demand Generator	5
Regional Appeal	9
Up and Comer	6
Community Celebration	6

Five events have been identified as a tourism demand generator AND an Up and Comer

Length of Event	Number of Events	Time of Year	Number of Events
1-day or less	10	Spring	1
2 - 3 days	10	Summer	18
4 - 7 days	3	Fall	2
1 week+	0	Winter	2

Key Findings

- Of the 23 events that are held in Wasaga Beach, 18 (78%) are held in the summer months.
- Most of the events are either less than one day (10 events) or 2-3 days in length (10 events).
- An Event Classification was done for all events. The following summarizes characteristics used to classify events:

Tourism Demand Generator – Definitely attracts visitors from beyond the region

- Motivates Travel – Unique, Authentic, Variety
- Appeal – Intl, National, Provincial, Regional
- Critical Acclaim (Best in Class)
- # of Visitors – Day Trips, Overnight Trips
- Avg. Distance Travelled – 80, 150, 300, 500+ km
- Event Length/Seasonality
- Tourism Infrastructure Available – Accommodations, F&B, Retail
- Supports Destination Positioning
- Unpaid Media Coverage “OUTSIDE” Destination
- Attendance #, Gate Receipts
- Economic Impact – Direct, Indirect
- Track Record – Years in Operation
- # of Suppliers
- # of Staff - Full Time, Volunteer
- Budget, Financial Stability
- Enhancement Development Plans

Regional Appeal – Not a tourism-centric event, but generates day trips

- Regional market attendance
- Subject matter or it’s “something to do” attracts regional interest
- A “travelling” event – moves from community to community, like a Rib Fest

Up and Comer – Represents the potential to become a tourism demand generator

- Identified and qualified market demand
- Identified and qualified emerging trend
- Significant incremental growth first year to the second year
- Opportunity to grow the number of event days
- Takes place at a time of year when tourism business is needed
- Reinforces destination positioning

Community Celebration – Not a tourism event

- Local market attendance
- Volunteer-run
- Local support – cash/in-kind
- Celebrates and recognizes local heritage, sports, culture, etc.

- 5 events are tourism demand generators.
- 14 events have regional appeal attracting an audience from local communities in the region.

- The 6 Up and Comer events have the opportunity to become more significant with further experience enhancements. These events are well positioned to impact tourism over the long-term.

CULTURE – PEOPLE-BASED PROGRAMMING

Key Findings

- Currently, there are no people-based experiences offered in Wasaga Beach. However, a historical walking tour is in the development stage.

ONLINE PRESENCE / VOICE OF THE CUSTOMER ASSESSMENT

A tourism operator’s online presence is critical to its success. It is the primary avenue potential visitors take to search out, understand, plan and book a visitor experience. As such, the number of places where tourism destinations and businesses can provide information to travellers and create online engagement is endless. To examine if there are basic levels of online presence and customer engagement with travellers, the assessment looked at operator websites and TripAdvisor pages/reviews to examine if there is a basic level of online presence and customer engagement.



WEBSITE USAGE BY TOURISM BUSINESSES

Business Sector	Number of Assets	Have a website	Photos of Infrastructure	Photos of visitors engaged	Call to action	How to get there	On-line reservations	Link to TripAdvisor	Link to Facebook
Roofed Accommodations	94	68	66	9	23	46	8	6	10
RV & Campgrounds	7	3	2	1	1	1	0		
Culture Based Assets	9	5	0	0	0	0	0	0	1
Natural Assets/Trails	14	14	13	0	0	13	8		
Food and Beverage	61	17	17	8	3	17	3	0	2
Activity Based	21	15	13	7	6	14	5	2	6
Festivals and Events	23	20	9	6	8	8	7		
Total	229	125	103	23	38	82	28	8	17

Key Findings

- 55% of operators have a website **45% don't**, meaning new potential visitors can't find them online
- Some sectors have strong representation – natural and activity-based assets for example, but the majority are poorly represented online
- Most websites lack appeal and don't provide visitors with essential information/assistance; they don't have attractive photos, a call to action, clear directional info, and an ability to book/reserve online (only eight accommodators take online reservations)
- Most do not provide a link to TripAdvisor or Facebook on their website
- Online presence is weak in Wasaga Beach



TRIP ADVISOR USAGE BY TOURISM BUSINESSES

Business Sector	Number of Assets	Have a TripAdvisor Account	Average Bubble Rating	Number of Visitor Photos	Number of Owner Photos
Roofed Accommodations	94	31	3.9	92	10
Culture and Heritage Based Assets	9	0	-	-	-
Food and Beverage	61	43	3.86	Not evaluated	
Activity Based Businesses	21	7	4.43	134	0
Total	229	81	4.06	226	10

Key Findings

- Participation in TripAdvisor, the number one travel resource in the world⁵, is weak (only 35% are using it).
- Surprisingly, given the anecdotal input received during stakeholder consultations/interviews, (negative feedback related to quality) customer ratings are acceptable at an average 3.9 bubbles (out of five) – this may be due to lower expectations of Wasaga Beach current customer base (it should be noted many properties had less than five reviews)
- It should be noted, guest's comments for some properties are among the worst we have ever encountered.
- Most accommodators do not respond to guest reviews, be they positive or negative.

⁵ TripAdvisor, 2016. 315 million unique monthly visitors, 70+ million TA members, 200+ million reviews and opinions, 115 million user contributions every minute.

TripAdvisor is no/ low-cost tool that represents an efficient way to engage visitors, yet operators in Wasaga Beach are not utilizing these valuable tools.

6. Ideal Guest Profiles

In 2012 the Ontario Tourism Marketing Partnership, now Destination Ontario, undertook a major market segmentation study. The study, released in 2013, researched the travel motivations of individuals in Ontario, Quebec, US Border and US Long-haul States and their experience with Ontario travel destinations, including Region 7 – BruceGreySimcoe⁶. The study provided insight into real and perceived traveller knowledge related to destinations within the province. It identified 12 traveller segments and their characteristics to help tourism operators/organizations identify likely segments to target for product/experience development and marketing.

While the study was done at a provincial and regional level, it provided insight to the TOWB and its tourism industry as it identified the primary and secondary market segments that align with Wasaga Beach’s tourism assets and experiences.

Regionally, the study identified six market segments. Tourism staff at the Town, along with representatives from TSC and RTO7 reviewed these six segments through a Wasaga Beach lens and based on the list of tourism assets found within Wasaga Beach determined that three of the six segments aligned with its current and yet to be developed tourism offering:

- Family Memory Builders
- Up and Coming Explorers
- Nature Lovers

The chart below illustrates what travel experiences and activities the identified segments participate in. Many of those highlighted can be found in BruceGreySimcoe and Wasaga Beach. Those experiences and activities that can’t be found in Wasaga Beach (culinary, touring, shopping) present opportunities for future product and experience development.

Family Memory Builders		Up and Coming Explorers		Nature Lovers	
On Ontario Trips	On Any Trips	On Ontario Trips	On Any Trips	On Ontario Trips	On Any Trips
<ul style="list-style-type: none"> • Sightseeing (Net) • Shopping • Nature sightseeing (Net) • Culinary • Fun/ theme park (Net) 	<ul style="list-style-type: none"> • Shopping • Sightseeing (Net) • Fun/Theme Park (Net) • Beach • Nature Sightseeing (Net) • Culinary • Touring (Net) 	<ul style="list-style-type: none"> • Amusement/the me park (Net) • Playing sports (Net) • Outdoor activities (Net) • Sightseeing (Net) • Nature sightseeing (Net) • Shopping • Culinary • Beach • Touring (Net) 	<ul style="list-style-type: none"> • Amusement/the me park (Net) • Sightseeing (Net) • Nature sightseeing (Net) • Outdoor activities (Net) • Shopping • Culinary • Beach 	<ul style="list-style-type: none"> • Camping • Outdoor activities (Net) • Nature sightseeing (Net) • Beach • Sightseeing (Net) • Touring (Net) • Shopping 	<ul style="list-style-type: none"> • Camping • Outdoor activities (Net) • Sightseeing (Net) • Nature sightseeing (Net) • Beach

Aligns with RTO7/Wasaga Beach Offer

⁶ Ontario Ministry of Tourism Culture and Sport. TNS Research Traveller Segments. February 2013. <https://www.tourismpartners.com/en/research/traveller-segment-profiles>

Regarding geography, the study suggested that TOWB development and marketing activities will be most effective if they consider/target individuals from the identified segments who live in “Nearby Ontario” (RTO 4, 5, 6, 7, 8 and 12 and includes the Greater Toronto Area). For the identified travel segments Wasaga Beach awareness levels/travel is low among individuals living in Quebec and the US⁷.

In the context of the WB TDMP, which is designed to identify strategic actions that once implemented will enhance the competitiveness and appeal of Wasaga Beach and grow tourism visitation and revenue, these segments represent the Ideal Guests for Wasaga Beach. The study identified that Up and Coming Explorers, Nature Lovers and Family Memory Builders can fuel future growth.

This growth can be stimulated in a variety of ways:

1. Giving current visitors reasons for continuing existing behaviour;
2. Articulating a broader, integrated offer that draws on the destinations strength and provides compelling reasons for current non-visitors with aligned interests to consider a trip;
3. Innovating, renovating and packaging product while improving quality to optimize growth potential among both current and prospective visitors, and;
4. Identifying traveller segments and geographic markets most likely to yield volume.

As the TOWB and its tourism stakeholders undertake to implement the recommendations presented in the TDMP, it is suggested they do so by focusing on generating new visitation primarily from non-visitors by focusing on strategies 2, 3, 4 above.

What Wasaga Beach Must Offer in the Future – To grow future tourism visitation and revenue from the identified market segments tourism operators must consider delivering a series of “programmed” activities that facilitate family and active couples’ gatherings and can be purchased at a group rate. Creating an interesting list of activity options within existing infrastructure, venues and facilities (mini golf, paintball, hand flying) will be key to meeting visitor expectations and delivering increased revenue.

For example:

- Family Tournaments/Activities – Mini-Golf, Paintball, Escape Rooms, Axe Throwing, Laser Combat, Nerf Wars, Hand Flying (Motorized Mini Cars/Trucks) and Sky Diving– offered at off-peak hours, sell a comprehensive family experience with special competitions, prizes, F&B.



⁷ The Segmentation Study was completed in 2013. Since that time operators perceived there has been an increase in visitors from Quebec, which could be a result of increased marketing directed at this market.

- Interpretive Outdoor Hiking/Biking/Paddling Experiences – offered by outfitters and local experience providers and sold through accommodators, retailers, F&B outlets, sell an all-inclusive experience with hands-on elements that involve every member of the family/group or active adults.



- Wasaga Under Siege Special Event – offer a comprehensive War of 1812 interpretive experience using the event as an anchor and layering on activities like “reenactor for a day,” an interpretive cruise that features a historic narrative of the water-based battle scenes etc.



As Products/Experiences Change, Ideal Guests Will Change – As Wasaga Beach evolves through Master Plan development those who will be attracted by this evolution will change. With the addition of new Main Street and beachfront accommodation choices, additional retail and restaurant options and enhanced town square, streetscapes, patios and parks the TOWB and its tourism operators can begin to target a different ideal guest (from the OTMPC Traveler Segment Study). This may include:

- **Connected Explorers** - rank well above average compared to other segments for almost all activities (museums, galleries, shopping, parks, landmarks, culinary, spa, beach).
- **Pampered Relaxers** - 88% travel to relax and pick destinations where they can do just that: 67% visited the beach, 37% visited a resort, and 23% visited a spa.

Family Memory Builders



Family Memory Builders are couples with young children, aged 35-54 years old. These Gen X-ers are parents who have built their lives around their kids. Leisure for them is all about spending quality time as a family – at home and on vacation. 77% want to connect with family on vacation. 71% want to create lasting memories as a family.

What They Do When They Travel – Travel is an opportunity to come together and bond through playful activities. When their kids are having fun, they are having fun too – and ultimately building memories together as a family. 54% of those interviewed went shopping, 42% visited a beach, and 45% visited amusement parks, theme parks, zoos, aquariums.

Media Habits – Above average online usage including search engines, weather, shopping, parenting sites and Facebook. This group are also magazine readers, notably parenting titles.

Up and Coming Explorers



Up and Coming Explorers consist of young families, aged 18-34 with kids. Many have a diverse background - 45% are visible minorities, and 40% are immigrants. This group is recently affluent and emerging into a new life phase that includes fresh experiences such as travel. As they define a new life for themselves, travel is an opportunity to learn and explore as a nuclear family. Visiting friends and family is not a primary travel driver. While this group often wants to be adventurous and energetic, their travel experiences often start with what is nearby and typically considered a core tourist attraction.

Media Habits – Active across social media platforms like Facebook and Twitter. Also, avid readers of the travel section of the newspaper.

Nature Lovers



Nature Lovers – Typically families with kids, have a passion for experiencing the great outdoors together. Travel for them is all about exploring new, undiscovered places off the beaten path. BruceGreySimcoe is the perfect place for this segment who are looking to be dazzled by awe-inspiring nature. With a lower than average Travel budget, these Travellers are happy with the basics – camping in a tent, spending time as a family, and taking in all the beauty around them. Because spending time outdoors means an opportunity to enrich family bonds.

Consideration – There is an emerging element of the Nature Lover segment that goes beyond families with kids. It includes **active adults/seniors**. These individuals enjoy experiencing the out of doors and outdoor recreation pursuits. They enjoy hiking, cycling, cross-country skiing, and snowshoeing. They also are artists, photographers, birders, and use outdoor settings as a backdrop for their interests. This group should be included as ideal guests.

Media Habits – Moderate traditional and online media users. Online habits include search, weather and Facebook. Offline media habits include magazines, TV but less so newspaper.

Aces

Wasaga Beach is being considered by Gateway Casinos & Entertainment as a location for a casino. Should Gateway decide to locate a casino in Wasaga Beach, Aces should be considered as a target market.



Aces skew towards older couples, but also includes younger people. They travel for love of gaming and gambling. They want to spend most of their time at casino resorts because of their exciting energy and ambiance. Casino resorts offer a well-rounded experience of entertainment, fun, escape and even indulgence that satisfy all their needs at once.

Aces	
On Ontario Trips	On Any Trips
• Casinos/ gambling	• Casinos/ gambling
• Shopping	• Shopping
• Fine dining	• Fine dining
• Sightseeing (Net)	• Sightseeing (Net)
• Theatre/ Concerts/ dance shows	• Beach

Aligns with RTO7/Wasaga Beach Offer

Media Habits – In everyday life, Aces consume TV/print/radio more heavily than digital.

7. Findings, Recommendations, Responsibility, Action Plan

A considerable amount of data has contributed to the development of the recommendations. This data, articulated through Key Findings, was validated throughout the consultation process. Findings resonated with tourism owner/operators, who believed when addressed could positively impact their business. The recommendations, therefore, represent a logical, coordinated and holistic approach to tourism destination management within a Wasaga Beach context. The overarching findings included:

- Collaboration will be fundamental to enhancing the competitiveness of Wasaga Beach;
- The Town will be required to assume an enhanced and more coordinated role in tourism management;
- Industry must come together and agree on the goals and recommendations of the TDMP, and;
- Residents will benefit from an enhanced quality of life because of new tourism infrastructure, services, activities/entertainment and a healthier local economy.

ROLES AND RESPONSIBILITIES

The TDMP recommendations are the result of an industry-led tourism development process. By listening to these stakeholders at each step of the process, the consultants were able to apply their expertise in tourism destination management to the realities that operators face and create a Wasaga Beach plan on behalf of tourism stakeholders and the municipality.

Role of the Tourism Industry (Operators): To be a successful tourism destination, those in the tourism industry – owners and operators of for and not-for-profit businesses, are responsible for developing and delivering compelling and appealing tourism experiences. It will be essential for industry stakeholders to understand and engage in the TDMP implementation steps if Wasaga Beach is to get to the next level of competitiveness and appeal.

Role of the Town of Wasaga Beach: With a TDMP plan complete and a course charted, implementation and action will be a shared responsibility of the tourism industry and the Town. However, it will be essential for Town staff responsible for tourism related matters, in collaboration with identified industry committees, to take a proactive role in facilitating the implementation of the TDMP. Within the town context, other organizations are involved in tourism activities. These include the Chamber of Commerce, Beach Management Board, Tourism Events Advisory Committee, Business Association, Friends of Nancy Island and others. If these organizations have a role to play in the future, it is identified under a specific recommendation.

Role of Supporting Organizations: Within a Canadian context tourism destination management includes many organizations at the national, provincial, regional and local level. The Town is not alone in their desire to grow tourism visitation and revenue and rely on support from:

- **Ontario Parks/Wasaga Beach Provincial Park (WBPP)** – As part of the new Ontario Ministry of Environment, Conservation and Parks, Ontario Parks manages 650 protected areas including 335 Provincial Parks. Their mandate is to “protect significant natural and cultural resources in a system of parks and protected areas that are sustainable and provides

opportunities for inspiration, enjoyment and education: now and for future generations. WBPP is a recreational day-use park.” The Wasaga Beach visitor center (part of the park) officially opened in 2012 to commemorate the bicentennial of the War of 1812. The visitor center is the gateway to the Nancy Island Historic Site. The Wasaga Nordic Centre and Trail feature over 50 km of hiking trails, including the Pine Trail and sections of the Ganaraska Trail. In winter the trail is open for cross-country skiing, ski skating and snowshoeing. The TOWB has an agreement to operate Beach Area One and Two. With these assets, WBPP plays a significant role in contributing to the visitor experience.

- **Georgian Triangle Tourism Association (GTTA)** – Sub-regional member-based tourism destination marketing organization covering the South Georgian Bay area. They lead and develop partnerships aimed at promoting the regional tourism destination. They deliver visitor services at information centres and marketing through a Visitor Guide and other activities. They brand themselves as Visit South Georgian Bay.
- **Tourism Simcoe County (TSC)** – County tourism organization that delivers a variety of services and programs to destinations and operators within Simcoe County. Their Mission is to promote Simcoe County as a first-class tourist destination by further developing the tourism industry and community partnerships and to provide tourism leadership throughout Simcoe County. They deliver numerous training programs to the industry as well as operate a website that features tourism businesses within the County free of charge. They fund cooperative projects through their Tourism Development Fund (used to support the creation of the WB TDMP).
- **Regional Tourism Organization (RTO7/BruceGreySimcoe)** – Regional tourism organization that works with destinations and operators within Bruce, Grey, and Simcoe Counties delivering a variety of programs and services to grow tourism visitation and revenues to the region. RTO7’s mandate is experience development, marketing, and investment attraction. They provide support and funding programs to assist municipalities and operators with tourism product and experience development, workforce development, and marketing.
- **Ontario Ministry of Tourism, Culture and Sport (MTCS)** – Provincial government ministry that takes on a variety of functions to support the tourism industry in Ontario. They deliver services regionally through field-officers located throughout the province. These tourism professionals work with communities within their territory providing guidance and counsel on tourism-related matters.
- **Destination Ontario** – Provincial industry-led marketing organization that works with Destination Canada to market Ontario outside of Canada and that markets Ontario to Ontarians. They have a variety of partner marketing programs that are made available to RTOs, DMOs, and individual operators. These programs can be accessed through the RTO, DMO or directly.
- **Destination Canada** – National industry-led tourism marketing organization that markets Canada outside our borders in key markets around the world. They partner with provinces and larger regions in a variety of marketing programs.



A FOCUSED, PRIORITIZED APPROACH

Recognizing that Wasaga Beach has a history in tourism, we identified early in the process that a new way of thinking was required. This approach values the past but recognizes dynamic changes in the visitor market; more specifically traveller motivations and behaviours. Continuing to offer the same Wasaga Beach experience year after year has resulted in a stagnant tourism offering and declines in visitation and tourism economic impact. However, with the downtown and beachfront development plans conditionally approved there is an opportunity to change the face of Wasaga Beach to the benefit of current and future residents and business owners. For this reason, the ensuing recommendations have been developed with an eye on the future and against the backdrop of major investments being made in the destination over the next 10+ years. However, should these development investments be delayed or altered the recommendations are still valid in that they address the fundamental gaps and opportunities present for Wasaga Beach and its tourism industry to flourish.

The assumption is that a tiered approach is required. An approach that manages expectations and accepts the capacity limitations in the near-term for the Town and industry stakeholders. Recommendations have adopted a phased approach and are developed for the;

- Immediate-term – 2019
- Medium-term – 2020 / 2021
- Long-term – 2022 / 2023

Written as a statement Key Findings are designed to capture the essence of an important discovery. Based on the analysis of quantitative information each key finding statement is followed by a specific recommendation that addresses or responds to the finding.

Key Finding #1

The tourism industry in Wasaga Beach, represented by private and public-sector operators, have not taken proactive steps to collectively enhance their overall competitiveness and appeal, to leverage business growth opportunities.

Recommendation #1

Tourism operators must come together to understand, embrace and be engaged participants in collectively supporting the implementation of the TDMP.

Role/Responsibility:

TOWB: With the approval of the TDMP, proactively engage tourism operators through a series of ongoing group discovery sessions designed to communicate the details of the TDMP to seek understanding and engagement. Reinforce the findings and recommendations that have direct applicability to operators, so they know the things they must do to enhance their competitiveness and appeal.

- Use a combination of larger, widely publicized Discovery Sessions and smaller, informal sessions organized by industry sector or geography
- Present, then discuss each recommendation – ensure understanding then ask participants to identify actions they could take to respond to the recommendation
- Develop a TDMP OPERATOR PLAYBOOK comprised of the lists of actions for each recommendation and distribute to operators after completion of the engagement process

Operators: Engage with TOWB, attend Discovery Sessions, provide input and implement initiatives identified in the TDMP OPERATOR PLAYBOOK to enhance competitiveness and appeal of your business and Wasaga Beach.

Action:

- TOWB staff facilitate a series of TDMP Discovery Sessions throughout the community – these informal sessions are designed to communicate the steps tourism stakeholders can take in their own business to support the collective actions recommended in the TDMP.

Performance Metrics:

- Hold three widely publicized TDMP Discovery Sessions through March 2019
- Hold a series of smaller, more informal sessions through March 2019

Key Finding #2

Unlike most destinations where tourism is an important part of the local economy, Wasaga Beach does not have an industry-led tourism leadership group that serves in an advisory capacity to decision makers on matters about tourism development and marketing.

Recommendation #2

Create an industry-led Tourism Advisory Committee (TAC) – a standing committee of Council whose mandate is to ensure tourism activities are aligned with the TDMP.

Role/Responsibility:

TOWB, TDMP Working Group: In partnership with the TDMP Working Group develop a process to select/invite 5-9 tourism industry leaders (tourism owner/operators) and one member at large (resident) to serve as the inaugural Tourism Advisory Committee (TAC). This committee replaces the current Tourism Events Advisory Committee as it is comprised of tourism owner/operators where the TEAC is not. Consider including a representative from Tourism Simcoe County and RTO7 as non-voting members on the committee.

- Understand Town policy and procedures about forming a standing committee of Town Council – with this understanding set out to form the TAC. If a public nomination process is mandatory, representatives from the TDMP Working Group will need to proactively recruit qualified individuals to come forward to be considered for the committee
- Develop DRAFT Committee Mandate and Terms of Reference (Source content from other destinations like Grey Highlands, City of Kingston, that have a TAC and customize for WB purpose. The mandate of the TAC is to oversee and be accountable for the implementation of the TDMP. Also to provide, on behalf of industry stakeholders, advice to the TOWB as it relates to tourism development and marketing matters.
- Identify tourism champions – individuals who have demonstrated leadership in their own business and to a lesser extent in the community and are or could be, leaders who embrace and support collaborative destination management for WB, and based on Town policy invite these individuals to form the TAC
- Once TAC is formed, communicate TAC's Mandate and Terms of Reference and committee members widely – consider holding a tourism industry event to formally introduce the committee, their roles and responsibility and how they will support the implementation of the TDMP

Action:

- TOWB staff to facilitate the creation of the TAC in Fall/Winter 2018/19.
- TAC to oversee and be accountable for the implementation of the TDMP recommendations.

Performance Metrics:

- When new Council is formed, seek acceptance and approval of the TAC – before March 2019.
- Implement, or at least put in motion activities that begin implementation of all 2019 recommendations.

Key Finding #3

The inconsistent quality and service standards of the tourism offering in Wasaga Beach is creating damaging impressions among existing and potential visitors and impacting current and future tourism visitation and revenues.

Recommendation #3

Create the Wasaga Beach Tourism Alliance whose participants accept and adhere to a list of quality/service imperatives and agree to develop and deliver exceptional experiences.

Role/Responsibility:

TOWB, TAC, RTO7, Tourism Simcoe County, Operators: Develop tourism alliance parameters; attainable quality/service imperatives and ideal experience elements based on acceptable tourism industry practices. Identify a framework in which participants can achieve QUALITY/SERVICE accreditation. Utilize the City of Toronto’s “We’ve Been Expecting You” program as a model. Example of quality/service imperatives⁸:



- Be Prepared
 - Learn about Wasaga Beach, its attractions and all it has to offer
 - Familiarize yourself with resources and tools used to assist visitors, including languages spoken by colleagues, volunteers, and others to be helpful
 - Ensure your space/environment is appealing and ready to receive visitors
- Be Proactive
 - Seek out visitor contact, as appropriate, assist others even if it’s not your responsibility
 - Look for opportunities to share your knowledge and experiences of Wasaga Beach
- Be Proud
 - Talk about unique features of Wasaga Beach, suggest (restaurants, attractions, etc.)
- Be Positive
 - Project an optimistic attitude, even when faced with a challenging situation
 - Be receptive to new ideas and ways to do things
 - Recognize the good in others and situations
- Deliver A Warm Welcome
 - Acknowledge visitor (acknowledge at 10 ft. and greet at 5 ft. (10/5 rule)
 - Smile, provide a welcome “Hi! My name is _____. Welcome to Wasaga Beach!”
 - Build rapport and use a friendly tone (e.g., “Is this your first visit to Wasaga Beach?”)
- Uncover Visitor Needs
 - Ask open-ended questions (e.g., “How may I help you?”)
 - Ask closed-ended questions (e.g., “What time is convenient for you?”)
 - Take note of what the visitor says (likes, dislikes, questions, comments)
 - Observe and assess what the visitor does not say (body language, mood, pace)
 - Demonstrate active listening skills (stop talking, repeat, paraphrase, restate, clarify)

⁸ City of Toronto. We’ve Been Expecting You. <https://www.wbeytoronto.ca/>

TOWB, TAC: Create a process to secure enrollment in the tourism alliance in conjunction with the TDMP Discovery Sessions (see recommendation #1) with follow-up afterward to achieve maximum participation by March 2019. Consider the following tactics:

- Everyone who is a licensed business must participate
- Businesses opt-in – fill out an online form to register
- Town staff solicit enrollment – telephone/email/newspaper/Facebook messaging
- If businesses are not registered and accredited by the specified date, they are not included/listed in TOWB tourism promotion activities

TOWB, TAC, WBTA: Using the quality/service imperatives and ideal experience elements (see above) communicate these to alliance participants. Identify best practice examples and suggested improvement strategies along with a system where participants self-regulate. Once they feel they meet the criteria, their compliance with the standards is validated by a peer in the alliance. With validation, participants receive QUALITY/SERVICE accreditation.

Operators: Embrace the alliance by agreeing to strive to meet quality/service and experience elements and seek to enhance their offering to receive peer-validated QUALITY/SERVICE accreditation.

Action:

- TOWB encourage participation and facilitate a process to ensure graduating levels of Tourism Alliance compliance with the Quality/Service imperatives are achieved by the end of 2019.

Performance Metrics:

- By the end of 2019 have 60 % of tourism businesses enrolled and accredited in the Tourism Alliance (Summer,30%, Fall 45%, Winter 60%)
- Grow enrollment and accreditation to 60% by summer 2020.

Key Finding #4

Elected officials and staff at the Town of Wasaga Beach recognize the importance of tourism to their economy. They have demonstrated a commitment to grow sustainable tourism to ensure ongoing success on behalf of their residents and business owners. However, current management and oversight of tourism-related activity within the Town’s organizational structure has evolved to the point where tourism-related activity is not aligned creating perceived and real inefficiencies. Tourism development and marketing activity fall with the economic development department, while festivals and events and beachfront management fall within the Recreation, Events and Facilities as well as the Administration departments. These activities are connected, and impact one another, therefore, should be better aligned at a strategic and operational level.

Recommendation #4

Based on skills required for tourism management and oversight* realign the Town's organizational structure and expand the staff complement to expedite the tourism initiatives identified in the TDMP.

*(Industry relations, product/experience development, events/programming, beach property management, marketing)

Role/Responsibility

TOWB: Conduct a review of tourism services/activities required based on the TDMP recommendations and determine where alignment/gaps exist in current staffing complement. Take steps to address these gaps through reorganization of existing staff resources or a progressive hiring process into a tourism division under Economic Development. Consider the following as a guide for potential department positions and roles:

- Leadership – Rally industry/staff, oversee implementation of the TDMP, liaise with other departments (Planning and Development, Public Works, Parks and Facilities)
- Support – Industry relations, implement TDMP recommendations/tactics
- Support – Develop/implement/manage tourism event strategy, public space programming (not operations/logistics which would remain under the current structure)
- Support – Beachfront management/strategy (not property leasing/logistics)
- Support – Marketing/communications, visitor services evaluation/delivery

Action:

- Undertake organizational review
- Present findings and recommendations to new council and seek approval to implement recommended changes

Performance Metrics:

- Complete organization review and present to Council by April 2019
- With approval begin reorganization May – October 2019

Key Finding #5

Tourism operators could benefit from existing or yet to be developed industry equipping/training opportunities to enhance their competitiveness and appeal. There is tourism market readiness gaps present as evidenced by TripAdvisor reviews.

Recommendation #5

Continue to deliver tourism industry training – grow participation by encouraging operators to leverage programs offered at the regional, county local level and recognize operators who take steps to enhance their tourism market readiness.

Role/Responsibility:

TOWB: Town staff must facilitate the enhancement of the knowledge base of its tourism operators by promoting the learning opportunities provided through partners such as RTO7, Tourism Simcoe County, Centre for Business and Economic Development (T3 Accelerator Training Program), Wasaga Beach Chamber of Commerce and others or by developing and delivering operator-specific training based on existing market readiness gaps. More specifically the TOWB must facilitate industry equipping/training and workforce development that considers the following:

- Identify needs and initiate a series of workforce development and industry equipping training/education activities that target tourism owner/ operators.
- Workforce development includes training activities that are hard skill specific. Training related to customer service, technology/computer skills, marketing/public relations and finance are examples.
- Industry equipping relates to tourism specific training. This includes Tourism 101 – Fundamentals of Tourism Market Readiness, Tourism Business Plan Development, Product/Experience Development and Enhancing Online Presence.
- Leverage the services of the Chambers of Commerce, Workforce Development Boards, Tourism Simcoe County and others who offer and deliver workforce development and industry equipping training and ensure tourism operators are aware of and invited to these training initiatives.
- Connect/recognize operator participation/completion of training programs to compliance in the Wasaga Beach Tourism Alliance quality/service imperatives.

Operators: Increase interest and willingness to improve business acumen by making the time to participate in the training initiatives offered. If you have staff, ensure you provide an opportunity for them to enhance their skills and abilities by encouraging them to participate, paying them to take training and rewarding their accomplishments.

Action:

- Implement a tourism industry survey that is designed to assess and benchmark the tourism market readiness of Wasaga Beach tourism stakeholders. Repeat survey every two years to gauge success and monitor uptake of industry equipping/workforce development initiatives.
- Identify and prioritize training topics to be implemented based on survey findings.
- Continue to inventory existing training opportunities that are delivered by other organizations and align these training activities with the Wasaga Beach tourism industry needs, communicate available training initiatives that are delivered by partners to Wasaga Beach stakeholders.
- Utilize a training model that maximizes the participation of industry stakeholders recognizing that individuals learn in different ways; consider delivering:
 - Workshops that include many participants
 - Small group sessions (10-15 people) that comprise like-minded/sector-specific business clusters such as retailers, restaurateurs, and accommodators
 - Small group sessions (10-15 people) that are geographically based
 - One-on-one training that targets owner/operators who have a genuine desire to get to the next level of competitiveness and demonstrate a willingness and ability to improve, leverage the T3 programmed offered through RTO7



- Webinars and other forms of online training. Utilize the expertise of 3rd party industry experts to explore online training solutions that meet the needs of owner/operators
- Make facilitating industry equipping/training and workforce development a core activity of TOWB for the next three years.

Performance Metrics:

- Implement an industry survey by March 2019
- Identify a minimum of four Town initiated training initiatives/topics by May 2019
- Deliver a minimum of two training sessions by December 2019

Key Finding #6

There is a need to improve the online presence of tourism operators.

A review of tourism operators websites revealed that 45% of operators do not have a site. Regarding the quality of websites, most are basic in function and design. Few show images of guests in a business setting, fewer use video and many don't have a call to action. For example, only 8.5% of roofed accommodators and 0% of RV/campgrounds accept online bookings.

Regarding a presence on TripAdvisor (the #1 travel information resource worldwide⁹), tourism operators are not leveraging the power of this resource. 71% of restaurants, 33% of activity-based/attractions, 31% of accommodators, and 0% of cultural attractions are on TripAdvisor.



Additionally, most operators do not respond to guest comments/reviews; a necessity if a business is to be viewed positively by those looking at reviews, according to TripAdvisor.

Recommendation #6

Tourism operators must enhance their online presence – websites, online listings, social media and TripAdvisor, to ensure potential customers see appealing content and mechanisms to purchase/reserve.

Role/Responsibility:

Operators: Review website to determine where improvements may be needed. Add photos and videos of visitors engaged in activities that bring the business to life. Ensure there is a call to action for direct sales, investigate adding an online reservation system, electronic payment tools like secure credit card transactions, PayPal or Square. Add “how to get here information.”

Operators: Operators without a website should move to invest in one by spring of 2019. Seek counsel from TOWB to understand the components needed for a tourism business website.

TOWB, Operators: Increase the number of tourism operators with active TripAdvisor accounts by reinforcing its importance and encouraging participation in training programs that help operators know how to interact, respond and resolve conversations with visitors.

⁹ TripAdvisor – 455 million unique users, 600 million reviews, 7.5 million accommodations, attraction, restaurant listings, 136,000 destinations, 775,000 vacation rental listings, 115 million traveler photos, as of March 25, 2018. <https://expandedramblings.com/index.php/tripadvisor-statistics/>

Operators: Leverage available, or secure new, high-resolution images that portray the emotional and physical connection of your business – illustrate the people, places, and ways the guest can engage in your business or service. Tap into RTO7’s Image/Video Development Partnership Program to leverage matching (at minimum) funding.

Action:

- Operators must embrace the power of the internet in the context of the travel sector by availing themselves of training opportunities available online and through workshops offered locally through TOWB, Chamber of Commerce, RTO7, and other business organizations.
- TOWB to facilitate training in areas such as website creation, online listings, social media and TripAdvisor.
- TOWB to use the asset assessment data to establish online social media operator participation targets for TripAdvisor and Facebook and monitor progress over the next 2 to 3 years.

Performance Metrics:

- Using the metrics captured in the asset assessment online presence audit (see pages 24, 25) enhance the online presence of operators (website and TripAdvisor) substantially, achieving as close to 60% active participation by all sectors by December 2019.

Key Finding #7

World-class experiences authentically connect visitors with the culture, heritage, and landscapes of a destination. Wasaga Beach operators have the potential to offer visitors exciting new ways to experience the community and surrounding area by showcasing opportunities for outdoor adventure, water-based exploration, and immersion in cultural and heritage offerings.

Recommendation #7

Encourage operators to develop and deliver experiences that connect visitors to the Outdoor Adventure/Recreation narrative.

By capitalizing on the experiential tourism imperative *“Learn something, by doing something, with someone who lives here”* these experiences leverage the talent of locals, who have a demonstrated willingness to be a part of yet to be developed but unique tourism experiences. By delivering hands-on learning opportunities, in partnership with accommodators, restaurants and others, these initiatives offer significant economic benefits to the entire community.

*A tourism product is what you buy.
A tourism experience is what you remember!*

Tourism experience development requires an “instigator.” An instigator is an organization, or individual, who initiates or instigates the experience. Their role is to bring together partners – an experience-provider, who has the ability, skill, expertise to deliver memorable experiences. The instigator then

couples the experience with an accommodator, a restaurateur, or other attraction. These partners only gain to benefit when “their experiences” connect to a greater offering, be it overnight accommodation, a meal, retail purchase or admission to an attraction. These experience extensions contribute to increased tourism economic impact.

Role/Responsibility:

TOWB/TAC, Operators: Identify and prioritize potential operators and experiences that align with the narratives. Once this is complete, staff to encourage operators to participate in RTO7 experience development training. (Some operators have already taken part in this training).

Operators: Participating in formal training may not be essential to offer great experiences at your business. Leveraging experiential tourism opportunities in a business setting, while requiring time to implement, is not difficult to undertake. Destination Canada offers an excellent online Tool Kit¹⁰ to help operators create compelling experiences. Operators are encouraged to consider the six experiential tourism imperatives¹¹ when developing new experiences:

1. Meet a Local: Learn something by doing something with someone who lives here.
2. Authentic: The experience is memorable because it’s real and makes a personal connection.
3. Touching the Senses: An experience engages the senses of sight, smell, hearing, feel and taste.
4. Unique: Look at what you offer and ensure it stands out and is different.
5. Exclusive Access: Experiential travel is all about getting access to places most people hardly ever get to see - going behind the scenes.
6. Take-Away: Ensure that at the end of the experience the visitor takes something away with them. It’s either something they made or something you give them.

Local Individuals, Operators, TOWB: Leverage online *experience booking engines* like Airbnb Experiences, Viator, Peek, GetYourGuide, WithLocals, and Klook by encouraging local experience providers, or hosts, to develop unique experiences and use these booking tools to communicate them to potential customers. Hosts are chefs, hikers, artists, musicians and passionate locals who have specific expertise and love sharing their community with guests by planning and leading experiences.



“Share your passion with the world. Create unique experiences around your city and earn extra money by bringing others along.”¹²

Action:

- TOWB, TAC to identify operators who are potential RTO7 Experiential Tourism training candidates and encourage them to take part in this program. These operators have:

¹⁰ Destination Canada Experience Tool Kit. https://www.destinationcanada.com/sites/default/files/2016-11/Programs_SignatureExperiences_Toolkit_Experiences_2011_EN.pdf

¹¹ Experiential Imperatives. Brain Trust Marketing & Communications, 2014.

¹² Airbnb’s Experience hosting site. https://www.airbnb.ca/host/experiences?from_nav=1

- Expressed interest in expanding their market in the off-season
- Indicated interest in facilitating the delivery of activities that extend the length of stay
- Relationships and connections to experience providers
- Identify operators, who may not want to be part of a formal training program but, with some direction, could be instigators or experience providers, then take steps to facilitate the creation of new tourism experiences.
- TOWB and operators should explore the promotional opportunities associated with online experience booking platforms and ensure Wasaga Beach residents and tourism operators know how to leverage these resources.

Performance Metrics:

- Increase the number of participants in the next RTO7 experience training session.
- Create at minimum three new experiential tourism learning opportunities/sessions for operators and individuals who have the desire and potential to create new tourism experiences (see recommendation #13).

Key Finding #8

The act of servicing visitors while in the destination has evolved based on how people access information and make travel decisions. Availability of digital and mobile technology has also had a significant impact on information access. Visitor behaviour has changed, therefore a move away from traditional tools like visitor information centres and printed publications are worth consideration. Technology, if embraced, will create new opportunities for visitor services providers to engage with more visitors.

The Town will take over the provision of visitor services from the Chamber of Commerce in 2019 and are therefore able to design and develop relevant and appropriate visitor information service strategies to meet the needs of future visitors to Wasaga Beach. Visitor services must inform, inspire and influence visitors to maximize their travel experiences while in the destination, and that should be the goal for Wasaga Beach.

Recommendation #8

Transition visitor information services by evaluating current/future visitor behaviour and advancements in digital technology and online information services.

Role/Responsibility:

TOWB, TAC: Using best practices a review of the future visitor information services delivered by the Town is warranted. To merely assume what is currently being done over the long-term is not recommended. Visitor services must move beyond the bricks and mortar VIC approach of delivery and proactively reach out to visitors using the method of delivery by which the visitor prefers to be engaged. Therefore, over the next 12 months, a move away from a year-round visitor information centre should be considered. Having a portable “pop-up” VICs located where visitors congregate is worth consideration. To ensure this new VICs meet the changing needs of visitors, VICs must transition from being information centres to experience centres where the visitor can book a hotel, make a dinner reservation or schedule a tour. Therefore, they will need to be connected to Wi-Fi.

TOWB: Provide free Wi-Fi to Main Street and beachfront areas. Wi-Fi service continues to improve and expand. More and more telecommunication providers are starting to offer cheaper local and international roaming options. Wi-Fi will, if it has not already, become the main source of connectivity. As a result, visitors will have less need for VICs as an information source. The proliferation of smart devices found in car computers, wearable technology, virtual reality headsets and even smarter smartphones is an indication that the primary method of trip planning for visitors *when in the destination* will be mobile platforms and apps.

TOWB, TAC, Chamber of Commerce: Revisit investments made to printed visitor publications, prioritizing activity based on visitor preferences. Recognizing the Chamber produces the Visitor Guide, and has a desire to continue to do this, ensure the positioning of this guide aligns with the TOWB new positioning and branding (to be introduced in spring 2019). Best practice observations support the value of hard-copy maps; it is therefore recommended that the Attraction, Trails, Street Map produced by the Chamber continue to be produced with a re-evaluation of its value to visitors be completed late in 2020 before print deadlines for 2021.

Action:

- Conduct a review of current visitor services against the backdrop of changing visitor behaviour.
- Explore possibilities of providing free WIFI in popular public areas.
- Develop a strategy that meets the needs of visitors and provides them with the services they require that enhances their visitor journey.
- Collaborate with the Chamber as it continues to deliver a Visitor Guide and Map ensuring these publications are visitor-centric while supporting the objectives of the Chamber.

Performance Metrics:

- TOWB to complete the Visitor Service review by February 2019 with the participation of TAC
- Once approved implement recommendations for the 2019 tourism season – May 2019
- Pilot a FREE WIFI program on beach one by July 2019

Key Finding #9

With limited financial resources to annually market WB (\$60,000 - \$100,000), the Town has done an excellent job communicating the positive attributes associated with a WB vacation experience. They have effectively grown their marketing budget through creative partnerships with Tourism Simcoe

County, RTO7 and others. These efforts have gone a long way to promote the long list of things to see and do in WB to its identified target markets. It is safe to say that over time, these efforts have helped to establish awareness for Wasaga Beach and all it has to offer as an attractive summer tourism destination.

However, against the backdrop of the TDMP, the soon-to-be initiated tourism brand development process, and the Main Street/Beachfront development plan, in the near-term there are reasons to refine the Town's approach to marketing; reasons include:

- Visitation levels in the summer months (July/August) are reported to be strong (visitation/occupancy data not available) and support businesses that rely on day-trip and overnight beach/water enthusiasts and event visitors, therefore, spending resources to stimulate business in this manner may not be necessary
- There are a limited number of businesses open in the off-season (October – May), this includes accommodators, restaurants, and attractions, therefore, stimulating business when visitors can't be adequately serviced is unnecessary
- Presently there are limited "New Reasons to Visit" therefore attracting visitors, who are looking for more than a beach experience, will be a challenge
- The current tourism product on offer, especially commercial accommodations, meet the needs of current visitors but potentially don't meet expectations of the Ideal Guest market segments

Therefore, taking a more tactical approach to marketing in the near-term, pending the TOWB and the tourism industry to respond to recommendations contained in the TDMP and for new positioning and branding, is a reasonable and responsible approach to take.

Recommendation #9

Create a transitional marketing plan that increases annually to support new branding, enhanced tourism activities, events, experiences, and Main Street/Beachfront development.

Role/Responsibility:

TOWB, TAC, Partners, Operators: Refine current marketing approach by developing a transitional marketing plan that sees tactical investments in 2019 then increased activity and annual budgets 2020-2023. Focus on maintaining awareness and stimulating visitation in 2019 then undertake more aggressive tactics to stimulate awareness and visitation 2020 – 2023, consider:

- Introducing new brand and positioning in Spring 2019 to primary markets and Ideal Guests – a generic message that presents fresh positioning for Wasaga Beach – consider tactical sponsorships that align with Ideal Guest targets (GTA cultural and family-friendly festivals and events)
- Refreshing TOWB Tourism website with new positioning/branding in 2019
- Limiting 2019 tactics/budget to activities that leverage partnering opportunities with TSC, GTTA, RTO7
- Focusing messaging in 2019 at stimulating mid-week overnight visitation featuring on/off beach family-focused activities (see examples on page 27)

- Promoting festivals and events in 2019 that have the capacity, encourage an overnight stay, occur in the off-season, and attract new visitors; Blues Festival is an example (see Ideal Guest profiles, page 26)
- Promoting Fall outdoor recreation opportunities at the WBPP Blueberry Trail site in 2019 - work with outfitters to develop overnight, mid-week interpretive hiking experiences, then market to active adults in primary markets
- Increasing marketing tactics in Spring/Summer 2020 to stimulate increased awareness/visitation for overnight visits focusing on family event activities beyond the beach – work with attractions to develop activity-based family group experiences, and market to primary markets and Ideal Guest segments
- Based on the success of 2019 Fall outdoor recreation campaign, increase spending/frequency of messaging in primary markets in 2020
- Introducing a winter campaign that promotes the Nordic Centre cross-country skiing/snow shoeing opportunities to active adults in the primary markets in Fall 2020
- Based on enhancements to the product/experience offering by 2021 increasing marketing budget to support promoting new reasons to visit, especially in the off-season

This chart provides a recommended approach to preparing a transitional marketing plan.

	2019	2020	2021 & Beyond
Budget	\$100,000	\$150,000 (MAT in place) Casino and Developer could grow this budget	\$250,000 - \$350,000
TOWB Only	NO (except website refresh)	YES	YES
Partners	GTТА, TSC, RTO7	GTТА, TSC, RTO7, Destination Ontario Outfitters Accommodators Gateway Casinos** Developer	GTТА, TSC, RTO7, Destination Ontario, Destination Canada Gateway Casinos**
Market	GTA, RTO1	Near Ontario*	Near Ontario, Quebec, US Border States, Intl Markets (with DO and DC)
Ideal Guests	Nature Lovers Family Memory Builders Up and Coming Explorers	Nature Lovers Family Memory Builders Up and Coming Explorers	Nature Lovers Family Memory Builders Up and Coming Explorers Connected Explorers Pampered Relaxers
Message	New Brand Refreshed TOWB tourism website Mid-week overnight family attraction-based experiences Fall outdoor experiences Specific F&E	Mid-week overnight family attraction-based experiences Fall outdoor experiences Winter Nordic Centre experiences Specific F&E Extended day trip offers	TBD based on available <i>New Reasons to Visit</i> Off-season overnight experiences Casino (TBD)

Media	GTA Cultural Festival sponsorship See partner media plans	Enhanced 2018 TOWB media plan Partner media plan New digital vehicles	TBD based on budget, targets, and messaging
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* RTO 4, 5, 6, 7, 8 and 12 and includes the Greater Toronto Area

** If successful securing location

Performance Metrics:

- Create a transitional marketing plan by February 2019 (focus on 2019/2020 activities)
- Implement tactical marketing initiatives with partners by spring 2019
- Launch new brand supported by refreshed TOWB tourism website by Summer 2019
- Secure relevant sponsorships to reinforce new brand/positioning in Summer 2019

Key Finding #10

The Nordic Centre property at Wasaga Beach Provincial Park (WBPP) is an underperforming tourism asset. This site offers 30 km of trails in spring, summer, fall and some of the most exciting groomed Nordic ski terrain and snowshoe trails in winter. The varied topography, geological significance found in the dunes area, and unique flora and fauna offer untapped potential for responsible tourism experience development. Current infrastructure – Nordic Centre, washrooms, signage, etc. require upgrades to meet visitor expectations.

With a clear understanding of the WBPP expressed through the Park Master Plan currently in development, park and Town staff will have a context for responsible beachfront management and development once the plan is complete. In the near-term, however, enhancing communication among Park and Town staff is necessary to meet the objectives of both organizations.

Recommendation #10

Continue to engage senior staff at Wasaga Beach Provincial Park/Ontario Parks as they complete the WB Park Management Plan, providing input to ensure their plan includes steps to address opportunities identified in the TDMP.

Role/Responsibility:

TOWB, WBPP, Ontario Parks, TAC: Take proactive steps to:

- Ensure opportunities focused on beachfront management/maintenance, conservation/protection, event planning/management, commercial tourism activity is done by balancing Ontario Parks and Town mandates.
- Leverage willingness of Park staff to entertain business proposals from private sector operators to utilize park assets responsibly, create, in partnership with the park superintendent, an Opportunities Proposal Guideline document to better inform and equip operators to develop successful ideas and initiatives.

- Identify strategies that result in enhanced infrastructure and programming at the Blueberry Trail/Nordic Centre property with a focus on priority seasons – Fall first, Winter second, Spring third.
- Explore the possibility of the TOWB and Ontario Parks forming a similar beach one/two partnership operating model for all or parts of the Nordic Centre/Blueberry Trail property.
- Maximize revenues for the park and private sector by creating a tender process to attract a suitable outfitter to deliver high-end, off-season, interpretive outdoor experiences and educational programming from a renovated Nordic Centre.

Actions:

- TOWB to organize a working session with WPPP and Ontario Parks senior staff to review/discuss the WB TDMP to ensure mutual understanding of its goals and directions as articulated through the recommendations. Consider identifying a prioritized list of activities based on a seasonal focus – test Fall program/infrastructure enhancements to stimulate hiking and cycling activity for example.
- TOWB and WBPP staff to continue to regularly meet to ensure maximum cooperation related to the implementation of one another’s mandates, programming and operations – the goal would be to strengthen the working relationship considering the development plans being undertaken by the Town.
- TOWB to collaborate with Ontario Parks to evaluate the opportunities associated with a shared approach to leverage the outdoor recreation assets found in the Nordic Centre property and to make investments to required infrastructure and programming enhancements into the WBPP Master Plan.
- TOWB to work collaboratively with Ontario Parks as they complete their Master Plan for the park to ensure WB tourism related plans and activities are incorporated in the plan.

Performance Metrics:

- Hold a working session to review/discuss the TDMP by January 2019
- Set against the backdrop of the TDMP identify a list of mutually beneficial opportunities that can be leveraged over the next 18 months
- Work together to create an Opportunities Proposal Guideline template by September 2019

Recommendations Medium-Term 2020 / 2021

Key Finding #11

In the Fall of 2017, the Province of Ontario, through its 2017 budget, made provision for municipalities to implement a tax on transient accommodations (Ontario Regulation 436/17 Transient Accommodation Tax). The tax, referred to as a Municipal Accommodation Tax or MAT, came into force on December 1, 2017. Town staff recently reviewed this legislation in detail and delivered a report¹³ to Council on June 14, 2018. The report concluded that:

The decision whether or not to implement a MAT is a complex one that requires careful consideration. Given the strategic and operational considerations and complexities of implementing a MAT, and the additional research and analysis that should be undertaken before a decision being made to move forward, significant staff time and resources would be required.

Additionally, based on consultations undertaken to date and the considerations contained in this report, staff do not feel that now is an appropriate time to implement a MAT. However, staff recognize that it is a useful tool and that at some point in the future the town will want to implement a MAT, especially as more destinations begin implementing MATs and the tourism environment becomes increasingly competitive. As such, staff recommend that they are directed to continue to monitor the topic across the tourism industry, at a regional and provincial level as well as continue to have discussions at the regional level with counterparts, with updates being brought forward as appropriate.

History – “Before the existence of Ontario Regulation 436/17, many jurisdictions had previously implemented a Destination Management Fee (DMF). DMFs are voluntary industry-led revenue generating tools that have been “recognized by many accommodations and tourism operators as an effective means of supporting regional tourism marketing development. Typically, participating hotels have collected these fees of their own accord and remitted them to their accommodation industry association. In turn, the association then transfers funds to a local or regional non-profit destination marketing organization for marketing activities promoting their city or region as a whole” (Ontario Ministry of Tourism, Culture and Sport, 2017).

There are some municipalities that are moving ahead with a MAT. The chart below shows a sampling of Ontario municipalities that have or are in the process of implementing a MAT. It should be noted that staff have scanned additional municipalities and found that the vast majority are urban centres and that the standard rate being applied in Ontario is 4%.

Municipality	Tax Rate	Number of Rooms	Number of Operators	Prior DMF (Yes/No)	Administration
Ottawa	4%	NA	NA	Yes	Ottawa Gatineau Hotel Association
Brockville	4%	343	10	Yes	Chamber of Commerce
Mississauga	4%	7,500	NA	No	Ontario Resort, Hotel and Motel Association
Sudbury	4%	2,000	45	No	TBD
Toronto	4%	25,281	NA	Yes	Greater Toronto Hotel Association
Kenora	4%	500	16	Yes	City of Kenora
Kingston	4%	1,800	24	Yes	City of Kingston
Thunder Bay	4%	2,300	38	No	TBD

The Blue Mountain Village Association (BMVA) has a Village Amenity Fee “that is applicable for all members who rent their properties to guests and collects income from these rentals. BMVA members who work with rental managers, e.g., Blue Mountain Resort or Lodges at Blue Mountain, each pay 1% of

¹³ Town of Wasaga Beach, Staff Report – Municipal Accommodation Tax. June 14, 2018.

the gross rental revenues earned from the property to BMVA. This fee is charged to the paying guests, collected and remitted by the rental manager on behalf of the member to the BMVA.

BMVA members who are managing their rentals privately, through online rental portals such as Airbnb, VRBO, etc., or independent managers, are responsible for collecting a 2% village amenity fee directly from guests and remitting the fees to the BMVA. (Blue Mountain Village Association, 2018)

In Wasaga Beach, there are approximately 114 motel and cottage court properties, seven campgrounds and two marinas that are licenced and supply a combined 2,346 beds/slips/sites (CBRE Tourism and Leisure Group, 2016).

Initial estimated financial calculations have been undertaken to provide a sense of the potential order of magnitude a MAT in Wasaga Beach might yield. Estimates are only preliminary, and the actual amounts may vary significantly. Some assumptions have been made in undertaking these calculations and are as follows:

- Transient Accommodation is limited to motels, cottage courts and campgrounds in Wasaga Beach. This scenario does not include sharing economy accommodations like Airbnb, VRBO etc. However, it would include these accommodations if a MAT was implemented.
- Occupancy rates are estimated based on the data contained within the Market Study - Beach 2 Proposed Resort Development, are adjusted for seasonal operations and are as follows:
 - 90% occupancy 28 days per year
 - 65% occupancy 67 days per year
 - 25% occupancy 76 days per year
 - 15% occupancy 56 days per year
- Estimated average daily rate is \$60 for campgrounds and \$100 for motels and cottage courts.
- A 4% MAT is implemented.
- There is an administrative cost of 20%.

Based on the above assumptions, it is estimated that Net Revenue could be approximately \$494,546.

Recommendation #11

Introduce a Municipal Accommodation Tax (MAT) for ALL transient accommodations in Wasaga Beach.

Role/Responsibility:

TOWB, TAC, Accommodation Operators, Non-Traditional Accommodation Owners (Airbnb etc.): As per the staff report, monitor MAT activity regionally and, based on actions of other jurisdictions, create a process to take steps to implement a MAT in Wasaga Beach collectively. Also, Airbnb, VRBO, Canada Stays, and Kijiji has approximately 148 active accommodations in Wasaga Beach which should be included in the program.

TOWB: Deliver an update of the June 14, 2018 report to Council and industry in June 2019 including action steps to ensure the implementation of a Wasaga Beach MAT initiative by Spring 2020. Include recommendations about the mechanism to collect funds as well as a proposed list of activities that will be funded as a result of the MAT.

Action:

- TOWB to monitor MAT progress/activity in a regional context.
- In consultation with accommodation operators Town staff to deliver a MAT implementation plan.

Performance Metrics:

- High-level MAT implementation plan by August 2019
- Communicate plan directly with accommodator sectors in September 2019
- Develop MAT guidelines/process/details by March 2020
- Introduce a Wasaga Beach MAT in May 2020

Key Finding #12

Wasaga Beach is ideally located within a 90-minute drive of the Greater Toronto Area (GTA), Canada's largest urban centre. With a population of 6.4 million+ people on its doorstep, tourism operators within Wasaga Beach have a significant market to draw business from. However, the proximity of this significant market to Wasaga Beach makes it reasonable for GTA residents to visit just for a day, arriving mid-morning and leaving in the late afternoon or early evening. Therefore, the opportunity to maximize tourism revenues is limited. While specific spending data is not available (see recommendation #4), anecdotal evidence suggests day trip spending is below the provincial average (RTO7 per household expenditures – Day Trip-\$97, Overnight-\$248¹⁴).

Recommendation #12

Take proactive steps to increase day-trip visitor spending.

Role/Responsibility:

TOWB, TAC: Intentionally create a forum to collectively explore and discuss opportunities to fully leverage those who choose to experience Wasaga Beach for one day. Understand who these visitors are and what their travel motivations and behaviours are, and through this understanding identify and deliver simple tactics designed to encourage them to stay longer and spend more. Consider:

- Utilize the FREE WIFI (see Recommendation #8, page 45) to connect and communicate with visitors once they arrive in town
- Distribute Value-added attraction, retail, F&B offers online or in hard-copy while they are in town
- Offer "Experience Itineraries" that take visitors beyond the beach to explore other attractions and features
- Program public spaces earlier/later in the day so when visitors are planning a day trip they arrive earlier and stay later based on the programming offered
- Introduce graduated/free parking rates – before 10:00 AM free/less \$, after 10:00 AM more \$, after 5:00 PM free/less \$

¹⁴ Ontario Ministry of Tourism Culture and Sport. RTO7 Tourism Performance Profile. Statistics Canada, Travel Survey of Residents of Canada and the International Travel Survey. 2016.

Action:

- Facilitate a planning session with TAC and other interested parties to explore the opportunity and to identify realistic and relevant tactics that can be easily implemented.
- Determine a mechanism (intercept survey) to benchmark current day trip length of stay and spending and repeat this survey annually to track movement.

Performance Metrics:

- Hold planning meeting in January 2020
- Implement benchmark intercept survey in late June 2020
- Identify ideas and implement by July 2020

Key Finding #13

Wasaga Beach’s tourism notoriety has been built on the successful delivery of festivals and events. Images of strongman competitions, classic car rally’s, musical performances, battle re-enactments, beauty contests and military exhibitions fill the memories of past visitors to the beach.



exhibitions fill the memories of past visitors to the beach.

That history continues today as the Town invests heavily in the delivery of events and festivals designed to attract and entertain locals and visitors alike.

The Town delivers programming throughout the summer months at the Main Street Market and behind the RecPlex. This includes mid-week musical performances/concerts in the intimate setting of the market



area and RecPlex.

However, in reviewing recent event activity, the Town implemented it was noted that resources were being directed at festivals and events that didn’t fully leverage opportunities to grow tourism visitation. This included supporting events that occurred when accommodations were already at capacity, for example, Canada Day weekend, or events that attracted audiences that did not necessarily support tourism businesses like F&B establishments, accommodators and other attractions/sites.

A more detailed analysis of the current roster of events using a Tourism Event Classification Model, suggests that an evaluation of Town investment and activity in festivals and events would be beneficial. The classification model was developed by the consultants for an assignment for Festivals and Events Ontario (FEO). The objective of FEO was to classify events to understand better and identify events that delivered economic returns from the visitor market. Events were organized in one of four categories:

- Tourism Demand Generator – the primary reason for a trip with tourism impact
- Regional Appeal – creates day-trip activity, modest tourism impact
- Up and Comer – potential to become a tourism demand generator
- Community Celebration – little or no tourism effect

Using this model 5 of 22 events were identified as tourism demand generators, eight offer regional appeal, three as Up and Comers and six as community celebrations:

Tourism Demand Generator Events:

- Hero's Festival
- Foam Fest
- Stonebridge Blues Festival
- Motorcycle Rally
- Wasaga Under Siege

Recommendation #13

Develop a tourism Events Strategy that supports attracting the right people at the right time – maximize return on investment by using the events classification criteria to guide the decision process/action

Role/Responsibility:

TOWB, TAC: Using the results from the event classification study (see asset matrix) develop a Tourism Events Strategy to inform future Town event investment and activity. The strategy should be grounded in focusing attention and resources that support existing or attract new events that:

- Reinforces the Wasaga Beach brand position
- Occurs at a time of the year when tourism operators need the business
- Attracts a customer consistent with the brand position (active and discerning families and active adults) and events that align with their travel motivators (outdoor recreation, culinary, learning opportunities, performing arts)
- Takes place over two or more days
- Demonstrates sound management and if necessary, a solid volunteer complement
- Has potential to grow to meet the above criteria

Classify Jazz in the Park and Main Street Market programming not as events but as activities that animate public spaces, which has benefit to visitors who happen to be in town and offer the potential to extend the length of stay of day-trip visitors. Further understanding as to who these activities attract would be beneficial to assess tourism impact.

TOWB, Event Organizers: Conduct tourism economic impact studies and spectator surveys for the five tourism demand generators events, if not currently being done. Benchmark visitor impacts and responses and repeat studies every two years to track tourism impact growth/declines and spectator opinions/feedback. Liaise with staff at Festivals and Events Ontario (TOWB and event producers to consider becoming members of FEO if they are not already) and seek their guidance. For example, they will know what towns are currently using events to grow economic activity and connecting with these peers will be of value.

Event Organizers: Leverage RTO7 Festival Implementation Program to support identified up and comer events through digital marketing to ensure their ongoing success in a tourism context.

TOWB: Explore the potential for the creation of a multi-use performance/event venue/facility as part of the downtown and beach development plan.

Actions:

- Develop a WB Tourism Events Strategy in time to influence 2021 plans/budget
- Town and event organizers to implement economic impact and visitor surveys
- Communicate details about RTO7's Festival Implementation Program and assist event organizers in applying for support

Performance Metrics:

- Develop and deliver Tourism Event Strategy by November 2020
- Conduct event research at identified tourism demand generator events in 2020

Key Finding #14

Much of the tourism product on offer needs upgrades and renovations however many operators struggle to reinvest in their facilities to keep pace with the expectations of today's visitor. The Town has a business façade improvement program, and while limited regarding budget, it is not fully utilized by business owners. RTO7 also has a program that could be leveraged in conjunction with the Town program. So, it appears there is some funding available to assist operators in making upgrades to their properties. Understanding why operators are not responding to these programs is important as upgrading the appearance of tourism businesses contributes significantly to stimulating increased tourism visitation and revenue.

Recommendation #14

Use existing TOWB façade improvement program and new/other public funding to assist with private-sector tourism infrastructure enhancements.

Role/Responsibility:

TOWB: Engage business owners to help determine why they are not leveraging available funding programs to upgrade their properties. With this understanding refine the program as necessary to meet the needs of tourism business owners. Develop a strategy that identifies potential candidates for tourism business upgrades and provides these owner/operators with information that may encourage them to explore the possibilities of undertaking business enhancements and upgrades.

TOWB, RTO7: Utilizing the TOWB façade improvement program and others communicate to owner/operator information about these partner funding initiatives designed to assist them in making upgrades to their businesses. If necessary, and where possible, modify the funding programs based on feedback obtained during business owner discussions.

Action:

- Conduct a series of one-on-one discussions with owner/operators to identify why they are not utilizing business enhancement funding programs

- Address where possible any barriers that exist with current funding programs that prevent business owners from leveraging available funds
- Communicate refined funding program details to the business community and encourage them to explore taking advantage of these programs

Performance Metrics:

- Increase the number of tourism businesses that leverage infrastructure enhancement programs.

Key Finding #15

In spite of strong occupancy and rate performance in July and August due to demand surpassing supply a significant impediment to tourism growth within Wasaga Beach is its accommodation offering. The type and quality of accommodation available were acceptable at one time, but except for a small number of operators quality, service and amenity standards are well below customer expectations.

Throughout the consultation process we heard this statement over and over from tourism operators and residents:

“When I have friends coming to the beach I tell them to stay in Collingwood.”

Customers also weigh-in on social media and TripAdvisor. The consultants, having completed similar projects in destinations across the country, report that they have never seen as many negative TripAdvisor reviews for accommodation properties as they found for Wasaga Beach.

Accommodation operators, while professional business operators have not had to make upgrades and enhancements to their properties due to several factors:

- Demand outstrips supply especially in the summer months
- Demand for accommodations from the grad/prom crowd in May/June who pay higher than average rates and are happy with the current offering
- See themselves as primarily a two-month operation (July/August)
- A high percentage of repeat customers who love the beach and put up with sub-standard accommodations
- Current customers have lower than average expectations
- Operators offer long-term rentals to transient market in the off-season to generate added revenue
- Uncertainty around downtown/beach development and effect it could have on some property owners

It is unrealistic to expect current operators to invest heavily in upgrades to enhance their properties. The current business model, a summer-only business, would not generate the return. However, attempts to make modest enhancements to quality and service levels would pay dividends in the near-term and set the stage for future improvements once the business model changes (see recommendation #9).

Recommendation #15

Introduce quality/service imperatives for the accommodation sector that go beyond fire and safety/licensing standards – Create a mechanism for the sector to self-regulate compliance.

Role/Responsibility:

Accommodation Operators, TOWB: To better understand operational challenges, facilitate discussions with accommodators. Potential learning will help the Town understand the current business climate for accommodators. It will also assist accommodators to know where upgrades that improve the quality of accommodation properties can be made resulting in revenue growth over the long-term. Experience in other destinations suggests that small investments in visitor value amenities such as WIFI, clock radios with built-in cell phone/tablet chargers, and fresh soft goods (bedspreads, sheets, towels, drapes, shower curtains) make a difference. It also includes fresh paint/wall coverings, keyless door locks, electronic payment/booking systems, enhanced bathroom amenities (soap, shampoo, conditioner, body lotion) to higher cost physical infrastructure upgrades. There is also potential to create operator buying groups where, under the leadership of one or two operators, owners work together to purchase amenities mentioned above as a group, and therefore benefit from volume purchase discounts from industry suppliers. This model has worked in destinations in Newfoundland and Labrador.

Accommodation Operators, TAC, TOWB: Utilizing current licencing and fire and safety standards, consider adding quality/service imperatives to the business licence program. Reference standards from other jurisdictions. For example, the “Approved” accommodation guidelines set out in the Nova Scotia Approved Quality First program administered by the Tourism Industry Association of Nova Scotia is an excellent example.

Accommodation Operators: Once an approved set of quality/service standards has been identified create a peer-to-peer evaluation process to determine compliance with the imperatives. Through this process, operators review each other and collectively agree if they have or have not achieved the standard.

Accommodation Operators, TAC, TOWB: Create a “Wasaga Beach Quality First” symbol that accommodators can post on their website, promotional material and front desk once they comply with quality/service imperatives. This process is repeated annually.

TOWB: Consider restricting promotion of accommodation offering to only operators who have achieved “Quality First” compliance.

Action:

- Engage accommodators in learning discussions.
- Tap into the experience of industry associations, like the Tourism Industry Association of Nova Scotia, who offer aid and expertise to operators in the accommodation sectors and leverage these resources through training activities.
- Accommodators to approve list of quality/service imperatives.
- Create the Wasaga Beach Quality First graphic.

Performance Metrics:



- Hold accommodator discussion sessions by October 2020
- Develop and approve a list of quality/service standards by November 2020
- Implement Wasaga Beach Quality First program in winter 2021
- Have 60% compliance by June 2021

Key Finding #16

Accommodation occupancy in Wasaga Beach peaks in July and August. In the shoulder months of June, September and October, when the weather is pleasant, and there are things to see and do visitation decreases dramatically. Also, in January/February, there are activity-based outdoor recreation opportunities available at WBPP, but visitation is limited to day-trip visitors who are not inclined to stay in paid commercial accommodations therefore further contributing to low occupancy levels.

Recommendation #16

Using the NEW Outdoor Adventure/ Recreation narrative take steps to grow visitation in May/June, September/October, January/February by developing, marketing and delivering new outdoor experiences, events and programming (see Recommendation #7).

Role/Responsibility:

TOWB, TAC, Operators: Establish an “Off-Season Business Stimulation Working Group”; operators, including accommodators, who have, or will have products and experiences available in the off-season and who can collectively develop programming designed to stimulate increased levels of overnight business.

Operators, TOWB: Leverage existing events, or create new events designed to stimulate increased levels of visitation in the off-season.

TOWB, Partners, Operators: Develop a targeted marketing campaign with partners (Tourism Simcoe County, RTO7, event producers, hotel partners) and go-to-market with a Wasaga Beach Off-Season Adventure Getaway program that includes a variety of experience/accommodation options booked through accommodators.

Action:

- TOWB to establish a working group to explore developing an off-season business stimulation strategy.
- Create a program budget and solicit participation from partners.
- Go to market with this initiative in August 2019.

Performance Metrics:

- Generate a 5% increase in occupancy in September 2020 through June 2021.

Long-term – 2022 / 2023

Key Finding #17

Tourism operators rely on regional tourism performance indicators generated from Statistics Canada and available through the Ministry of Tourism, Culture and Sport (MTCS). These performance profiles are two years old when published and are not representative of tourism performance in a Wasaga Beach context. Wasaga Beach Provincial Park (WBPP) annually records the number of parking passes sold, and the Chamber of Commerce collects necessary information from those who stop in the visitor information centre. This limited performance data inhibits sound business planning and therefore mechanisms to record Wasaga Beach centric visitor performance is needed. It is recognized that if a MAT is implemented occupancy data would be available for accommodators in Wasaga Beach.

Recommendation #17

Create mechanisms to track tourism performance at the community/local level, including accommodation occupancy, visitation, spending.

Role/Responsibility:

TOWB, Tourism Simcoe County, RTO7, Other DMOs in Region: Work together to explore possibilities of tracking tourism performance at the regional/local level, consider:

- Engaging CBRE Canada, for example, a third-party resource to capture confidential accommodation statistics (they currently perform this service for cities across the country)
- Utilizing the expertise of the MTCS research staff to help identify ways to obtain this data through Stats Canada data
- Undertaking a regional tourism research/survey program, using intercept techniques, targeting visitors at crucial tourism locations to gather basic information like place of origin, party size, the reason for visit, length of stay, accommodation used, dollars spent etc.
- At the local level putting in place a mechanism for operators to report attendance figures, occupancy

Action:

- RTO7 to take the lead to organize and facilitate discussions among regional partners

Performance Metrics:

- Have a mechanism for reporting regional/local visitor performance data in place by January 2022

Key Finding #18

Tourism infrastructure and service gaps are present in the destination. They include everything from adequate comfort stations, visitor wayfinding signage, French signage and visitor information at sites, limited public transportation options to get to and travel within WB and workforce/labour shortages at tourism businesses. There is an opportunity to address infrastructure gaps when Main Street and beachfront development occurs. Plans to remedy labour shortages are being organized regionally, but this will be an ongoing activity as development occurs within the destination.

Recommendation #18

Address basic infrastructure and service gaps that are negatively impacting the visitor's journey.

Role/Responsibility:

TOWB: Identify and prioritize (critical to not-so-critical) the list of infrastructure gaps beyond those that will be dealt with through other recommendations in the TDMP.

TOWB, Developer: Together identify the gaps that could/will be addressed through the development of Main Street and the beachfront, ensure these gaps remain front and centre during the planning phase of the development plan and that energy and resources are directed at filling the gaps.

TOWB Elected Officials, TOWB Tourism Staff: Ensure elected officials understand the service and infrastructure gaps so they can proactively inform Federal and Provincial politicians and officials of the WB needs to secure funding support.

TOWB, Regional Labour Task Force: Remain an active partner in the Tourism Labour Supply's Task Force effort to improve labour shortage issues including affordable housing and transportation for workers and employment attraction for tourism sector jobs.

Action:

- Prioritize the list of infrastructure gaps where investment is needed for a more focused advocacy effort for specific projects.
- Be proactive, by setting up meetings with elected provincial representatives to ensure they understand the infrastructure gaps and need for increased investment.

Performance Metrics:

- Reduce infrastructure and service gaps by 2023

8. Appendices

Appendix A – Industry Consultation Participants

Consultation Participants	
Steering Committee	Four meetings
Andrew McNeill, Director of Economic Development, Tourism	Town of Wasaga Beach
Johanna Griggs, Economic Development Officer	Town of Wasaga Beach
Ellen Timms, Economic Development Officer	Town of Wasaga Beach
Chris Roos, Director - Recreation, Events & Facilities	Town of Wasaga Beach
Angela Webster, Senior Special Events Coordinator	Town of Wasaga Beach
Michael Gennings, Communications	Town of Wasaga Beach
Kathryn Stephenson, Director	Tourism Simcoe County
Bill Sullivan, Chief Executive Officer	RTO7
Alex Hogan, Project & Administration Manager	RTO7
Christine Dodds, Field Manager	Ontario Ministry Tourism, Culture and Sport
Working Group	Three meetings
Kathy Mulgrew, Director	WB Blues Festival
Jennie Elmslie, Owner/Operator	Free Spirit Tours
David Cubitt, Owner/Operator	Wasaga Beach Brewery
Richard Marcolini, Owner/Operator	Riverdock Suites
David Hobbs, Owner/Operator	Beavertails
Les Farkas, Owner/Operator	Skydive Wasaga Beach
Nelson Marques, Owner/Operator	Barcelos Restaurant
Tourism Events Advisory Committee	Conference Call – Committee
Town of Wasaga Beach Department Heads	Face-to-Face Meeting
Beach Management Board	Through Representative
Individual Interviews	
George Vadeboncoeur, CAO	Town of Wasaga Beach
Andrew McNeill, Director of Economic Development, Tourism	Town of Wasaga Beach
Kathy Mulgrew, Director	WB Blues Festival
Gary Sawatzky, Owner/Operator	Skull Island Mini Golf
Bonnie Smith, Councillor	Town of Wasaga Beach
Brian Smith, Mayor	Town of Wasaga Beach
Doug Vitali, Volunteer	Member Beach Management Board
Gloria Shaw, Owner/Operator	Accommodator – Adrian’s
Shirley Beere, Owner/Operator	Accommodator – Edgewater Cottages
Martin Rydlo, Volunteer Director Marketing/Business Development	Georgian Triangle Tourism Association Town of Collingwood
Frank Giannone, President	FRAM Building Group
Richard Marcolini, Owner/Operator	Accommodator – Riverdock Suites
David Hobbs, Owner/Operator	Food & Beverage – Beavertails
Bruce Roberts, Volunteer	Accommodator, WB Business Association
Greg Forbes, Park Superintendent, Meghan Pomeroy, Planner	WB Provincial Park, Ontario Parks
Joanne Pavlovic, Owner/Operator	Attraction – WB Hand Racing
Donna Langman, Owner/Operator	Attraction – WB Paint Ball
Jennie Elmslie, Owner/Operator	Outfitter – Free Spirit Tours
Richard Bowering, Owner/Operator	Outfitter – Eagle Adventures
David Cubitt, Owner/Operator	Food & Beverage – Wasaga Beach Brewery

Industry/Public Discovery Sessions	Dates
Project Launch	April 30
Findings/Observation Validation Session	June 11
DRAFT Recommendations Session	July 23

Wasaga Beach Tourism Destination Management Plan Discussion Guide April 18, 2018

Note: Questions will be tailored/tweaked based on interviewee experience and the sector they represent. Close-in interviews will be specific and based on the interviewee. Questions for residents will be more general and attempt to capture feelings related to tourism in the context of community development, economic prosperity, quality of life.

Introduction:

- A brief introduction and overview of the goal of the Wasaga Beach (WB) TDMP
- Invite participants to give a brief overview of their situation

Questions – *Tourism Stakeholders*, (includes Beachfront Board rep):

- What was your most significant business success in the past year? Was it a good year for your business? (Gain perspective to help shape other questions)
- In thinking about WB as a tourism destination, and outside of the beach itself, what do you think is its most attractive asset? Is there anything else?
- Do you believe there is an opportunity to enhance WB as a tourism destination? If yes, why? If not, why not?
- What do you think is the single barrier to enhancing tourism within WB?
- For a business what does it mean to you to be tourism market ready?
- In thinking about the various roles of those involved in the tourism sector in WB, what do you see as the primary role of the following:
 - Tourism operators (accommodations, F&B, retail, attractions/activities)
 - Town of Wasaga Beach
 - Tourism and Events Advisory Committee
 - Beachfront Management Board
 - Wasaga Beach Provincial Park
 - Others – RTO7, Simcoe County
- Whose role is it to develop WB as a tourism destination?
- Have you heard of the plans to develop WB – Would you say you are well informed or have a general understanding? What are your thoughts on the ideas?
- In tourism, we use the term “Ideal Guest” to describe the customer whose travel preferences align with the destination – How would you explain the people who visit WB for tourism activities?
- Thinking about the plans to develop WB would you agree or disagree that the “Ideal Guest” for that kind of tourism destination aligns with the current guest? If so, why? If not, why not?
- There are several annual events in WB, do you think these events would be of interest to WB future Ideal Guest?
- Successful tourism destinations “differentiate” themselves from the competition – does WB have a differentiator? If so, what is it? If not, what could it be?
- Is there anything else you think we should know about as we embark on the TDMP?

Questions – *TEAC representative*: (Use introduction identified above)

- As a resident of WB, what are you most proud of, regarding the place you live?
- Has WB changed over the past five years? If so, how?
- What is your vision for WB?
- What is the shared vision of the TEAC?
- What will contribute to that vision coming to pass? What will prevent it from happening?
- Where does tourism development fit into your future vision of Wasaga Beach?
- Who do you see as responsible for the development of WB? What about tourism development?
- Have you heard of the plans to develop WB – Would you say you are well informed or have a general understanding? What are your thoughts on the ideas?
- What are the things that most excite you about the plans?
- What concerns you?
- Is there anything else you think we should know about as we embark on the TDMP?

Appendix C – TDMP Working Group Mandate

Tourism Destination Management Plan Working Group Terms of Reference

Vision:

Implement a **Tourism Destination Management Plan (TDMP)** that positively impacts the growth and prosperity of the Town of Wasaga Beach through increased tourism visitation and revenues.

Mission:

The TDMP Working Group (WG) are stakeholders from the tourism industry tasked with assisting town staff and a third-party consultant in the implementation of the Wasaga Beach TDMP. The plan, when complete, will provide a roadmap for the town and its tourism industry designed to enhance the competitiveness and appeal of Wasaga Beach.

Scope/Jurisdiction:

1. As private and public-sector representatives of the Wasaga Beach tourism industry serve as advisors to the town for the creation of a 3-5-year Tourism Destination Management Plan.
2. Act as a resource to the consultant throughout the process (May – July 2018), providing input and feedback about TDMP findings, observations and recommendations. Three 60-90 – minute meetings/conference calls will be scheduled - Program Launch (late April), Findings/Observations Session (mid-June), DRAFT Recommendations Session (mid-July).
3. Provide input, based on individual experience, keeping in mind the goal of gaining perspective that will support the holistic development of Wasaga Beach and serve all who have potential to benefit from the TDMP.
4. Ultimately endorse the Wasaga Beach TDMP before it is presented to Town Council for formal approval.

Composition:

The WG shall be comprised of private and public-sector tourism industry representatives and include a cross-section of the sectors that are the Wasaga Beach tourism industry.

Terms of Appointment:

WG activity will be April – July 2018

Activities and Responsibilities:

- Meet (face-to-face or conference call) as a group on three occasions to provide input for the development of the Wasaga Beach TDMP.
- Be available for one-on-one conversations with the consultant to provide perspective and input on aspects of plan development.
- Before release, and approval of Town Council, endorse the plan.

Appendix D – Tourism Landscape

Tourism is one of the fastest growing segments of the economy. The Town of Wasaga Beach and its tourism stakeholders have an opportunity to share in this surge in activity and the prosperity that comes with it with effective implementation of their Tourism Destination Management Plan. Becoming a competitive destination and tourism operator is paramount to future success and taking proactive steps to enhance the appeal of Wasaga Beach now will pay dividends into the future.

The United Nations World Tourism Organization (UNWTO) defines tourism as “social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure.”



Tourism has boasted virtually uninterrupted growth over time, despite occasional shocks, demonstrating the sector’s strength and resilience. International tourist arrivals have increased from 25 million globally in 1950 to 278 million in 1980, 674 million in 2000, and 1,323 million in 2017. Likewise, international tourism receipts earned by destinations worldwide have surged from US\$ 2 billion in 1950 to US\$ 104 billion in 1980, US\$ 495 billion in 2000, and US\$ 1,237 billion in 2017.¹⁵

According to the World Tourism Council, in 2017, Travel & Tourism’s direct, indirect and induced impact accounted for:

- US\$8.3 trillion contributions to the world’s GDP, 10.4% of global GDP
- 313 million jobs, 1 in 10 jobs around the world
- US\$1.5 trillion exports (6.5% of total exports, 28.8% of global services exports)
- US\$882 billion investment (4.5% of total investment)¹⁶

Further, the Council reported that 2017 was a bumper year for the global Travel & Tourism sector, which grew at 4.6%, much faster than the economy (3% growth during 2016). The sector created 7 million new jobs in 2017, 1 in 5 of all new jobs across the world.

“The Americas (+3%) welcomed 207 million international tourist arrivals in 2017, with most destinations enjoying positive results. **In North America (+2%), robust results in Mexico and Canada contrasted with a decrease in the United States, the region’s largest destination.**”¹⁷

The positive results continue into 2018. International tourist arrivals grew 6% in the first four months of 2018, compared to the same period last year, not only continuing the strong 2017 trend but exceeding UNWTO’s forecast for 2018.



¹⁵ UNWTO. International Tourism 2017 - Tourist arrivals and tourism receipts, 04/24/2018.

¹⁶ World Travel & Tourism Council. Travel & Tourism Global Economic Impact & Issues 2018 Report, March 2018.

¹⁷ UNWTO. Tourism Highlights, 2017.



In 2017, Destination Canada (Canada's international marketing organization), reported that international arrivals to Canada reached a new all-time high of 20.85 million (+4.4% over 2016), surpassing the record high of 20.06 million previously set in 2002 by 3.9%.

US visitors (14.33 million, +3.1%) continued to make up most tourist arrivals to Canada in 2017. Among Destination Canada's core markets, the Asia-Pacific region (1.90 million, +11.4%) led 2017 arrivals, followed by Europe (1.76 million, +0.7%), and Latin America (498,000, +39.3%).

Overnight arrivals from non-US (overseas) origins (+7.2%) expanded at a pace slightly ahead of global international arrivals as reported by the UNWTO (+6.7%) in 2017, with Destination Canada's ten overseas markets (+9.1%) expanding at twice the rate of non-Destination Canada markets (+4.0%).

"These results reflect a shifting landscape for the Canadian tourism industry when compared with the previous peak in 2002 when just 19.4% of visitors to Canada came from overseas origins (vs. 31.3% in 2017). Destination Canada's emerging Asia-Pacific and Latin America markets are also playing a larger role in overseas visitation, ahead of the historically strong European markets, with Destination Canada's target markets in Latin America leading year-over-year growth and Asia-Pacific now overtaking Europe as Destination Canada's largest overseas region in 2017."¹⁸

Much of the growth in 2017 was driven by increased direct air arrivals, both from the US (+6.6%) and from overseas (+9.5%) markets. The ongoing expansion of air access to Canada is linked to seat capacity increasing significantly overall (+7.0%) and in Destination Canada's core markets – Latin America (+45.7%), Asia-Pacific (+22.2%), Europe (+4.4%), and the US (+3.8%).



In 2017, Canadians travelled more internationally than they did in 2016 (33.1 million trips, +5.7%). Canadians took more trips to the US (+4.8%) and especially to overseas destinations (+7.2%).

In 2017, national roofed accommodation occupancy increased by 1.8% to 65.6% and the average daily rate (ADR) reached \$155.10, up 4.8% compared to 2016. Provincially, the highest ADR was recorded in the three provinces with the highest international arrivals for the year – British Columbia (\$172.51), Quebec (\$167.99), and **Ontario (\$154.75)**. While year-over-year growth in ADR was strong in these three provinces, the strongest growth was observed in Nova Scotia (+7.8%), Prince Edward Island (+7.2%), and Yukon (+6.9%).

Nationally, revenue per available room (RevPAR) also climbed significantly in 2017, reaching \$101.69 (up 7.8% over 2016). The strongest annual performance was observed in British Columbia (\$121.01), Quebec (\$118.16), and **Ontario (\$107.19)**. The biggest gains compared to 2016 were in Nova Scotia (+12.4%), Manitoba (+10.3%), and British Columbia (+9.6%).

¹⁸ Destination Canada. Tourism Snapshot 2017, Volume 13, Issue 12. March 2018

In 2017, five of the top ten American states with the highest visitation to Canada is on the east coast of the US and include New York (#2), Florida (#4), Massachusetts (#8), New Jersey (#9) and Pennsylvania (#10). The total visitor spend for these US states in Canada was over five hundred million dollars.¹⁹



Like the rest of Canada, Ontario had a banner tourism year in 2017. With 144,000 annual visits, \$34.1 billion in tourism receipts (+5.5% vs. 2016), \$26.8 billion in visitor spending (+5.9% vs. 2016), and total tax revenue of \$11.8 billion (+4.4% vs. 2016) tourism continues to be a contributing factor to Ontario’s economy. Tourism represents 188,000 businesses and generates 391,000 jobs and contributed \$32.7 billion in GDP (+5.8% vs. 2016).

Year	Ontario's Tourism Receipts (\$ Billions)	Annual Percentage Change
2014	29.8	4.5%
2015	32.3	8.4%
2016	34.1	5.4%

Ontario's Tourism Receipts by Market of Origin (\$Millions)					
Year	Ontario	Other Canada	US	Overseas	Total
2014	19,222	2,121	3,315	5,176	29,834
2015	20,426	2,376	3,737	5,787	32,327
2016	20,949	2,533	4,585	6,012	34,078

Accommodation	2016	2017	%
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¹⁹ Tourism Industry Association of Canada. (2017). 2017 TIAC and Visa Summer Travel Snapshot, Spending by Top 10 Inbound US States.

ONTARIO			Change
Occupancy %	67.5	69	2.2
Daily Rate \$	144.2	152.8	5.9
REVPAR \$	98.3	106.6	8.4
CENTRAL ONTARIO			
Occupancy %	56	58.1	3.7
Daily Rate \$	136.07	138.49	1.7
REVPAR \$	77.81	82.21	6.4

Ontario Tourism Outlook²⁰	2014	2015	2016^P	2017^P	2018^F	2019^F
Total Ontario Inbound	-1.6%	6.2%	1.5%	2.1%	1.4%	1.7%
Ontario Residents	-2.1%	5.8%	0.4%	1.4%	1.6%	1.5%
Other Provinces	3.2%	8.0%	3.0%	2.3%	1.2%	1.2%
United States	-1.8%	9.4%	12.5%	7.6%	-0.3%	3.3%
Overseas	13.1%	8.1%	2.8%	5.7%	3.1%	2.9%
Total Expenditures (\$million)	11.8%	2.4%	1.9%	9.9%	4.7%	3.7%
Ontario Residents	6.9%	0.5%	-2.6%	10.7%	2.3%	1.0%
Other Provinces	16.7%	-3.3%	1.0%	5.7%	7.4%	5.4%
United States	3.1%	16.8%	11.8%	10.0%	6.7%	4.8%
Overseas	32.8%	1.3%	7.3%	9.8%	8.2%	8.4%

P = Preliminary; F = Forecast

Note: Total expenditures refer to total trip costs, not expenditures attributed to Ontario.



The most recent regional visitor stats for RTO7 are from 2016, therefore, it is impossible to determine if the strong performance seen

²⁰ Ontario Ministry Tourism, Culture, Sport. Tourism Outlook. http://www.mtc.gov.on.ca/en/research/business_outlook/outlook.shtml

globally, nationally, and provincially has trickled down to the regional level.

Total Visits to Region – 2016	
Total Household/Party Visits	8,318,700
Total Person Visits	11,451,700
Length of Stay (Person Visits)	
Overnight	4,830,800
Same-Day	6,620,900
Main Purpose of Trip (Person Visits)	
Pleasure	5,218,200
VFR	4,641,500
Shopping	349,100
Convention (Personal)	42,000
Business	832,500
Convention (Business) Conferences	131,100
Other Business	701,400
Other Personal	368,300
Total Visitor Spending in Region – 2016	\$
Total Visitor Spending	1,327,333,000
Length of Stay (Visitor Spending)	
Overnight	850,642,000
Same-Day	476,691,000



While tourist statistics are not available for Wasaga Beach, it could be concluded that the positive provincial, and Central Ontario results reported above have had a positive effect on visitation to Wasaga Beach. However, visitation is only one measure of success. If the people visiting are not the ideal guests, in that they are not spending money in the tourism businesses present then the sustainability of those businesses are at risk. Having products, experiences, and infrastructure that meets the needs of visitors will stimulate increased levels of visitation and revenues. Operators can either agree or disagree with this assumption, as they are the only ones who know how their businesses have performed based on the number of visitors, revenue and profit.

However, given the plans for significant new investments in the development of Wasaga Beach over the next several years, it is safe to assume that tourism visitation and revenues will increase substantially. Several factors have the potential to impact this:

- A pending decision from Gateway Casino & Entertainment regarding a location for a casino (either Wasaga Beach or Collingwood)
- Wasaga Beach Master Plan – Main Street and Beachfront development
- Construction of branded hotel property(s)
- Implementation of a Municipal Accommodation Tax

These factors create a positive backdrop for the implementation of the Wasaga Beach TDMP.