

PARRY SOUND AREA TOURISM SUMMIT

REDAC Presentation – February 17, 2016

Tourism Activities Analysis and Recommendations



Agenda

- Review of Tourism Stakeholder feedback
- Review of Tourism Operator Survey
- Tourism Summit Session Summary
- Recommendations
- Discussion

Project Goals

- Identify potential service gaps; ✓
- Identify potential service overlaps ✓
- Align tourism stakeholder priorities ✓
- Improve collaboration and coordination of tourism programs and services ←

Tourism Visits and Spending in Parry Sound at a Glance...

- 1,087,201 visits in 2012 (69% overnight)
- \$132,736,930 in visitor spending (87% from overnight visits)
- Average per person spend for overnight \$154 (Ontario average is \$290)



Incremental
growth adds up

TOURISM STAKEHOLDER ORGANIZATIONS ROLES AND RESPONSIBILITIES REVIEW

Seguin Township
Municipality of McDougall
Township of McKellar
The Town of Parry Sound
Township of The Archipelago
The Township of Carling
Georgian Bay Biosphere
Parry Sound Tourism
Parry Sound Chamber
Parry Sound DBA
Explorer's Edge

Analysis Methodology



Tourism Roles and Functions

DMO Name: _____ Representat _____

Visitor Information Management

Level of Engagement
 High = mandate of organization
 Med = play a part role
 Low = very little attention in this area
 No = not involved

What does this look like in your community? _____

Current _____

Future _____

Which of the following does your organization do?

Operate a physical VIC Where?
 Answer phone inquiries
 Respond to visitor emails
 Service walk-visitors

Season _____

Number of Staff _____

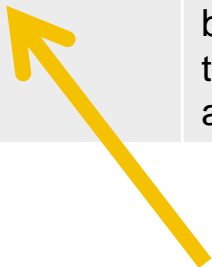


		Industry Training and Development					
		Level of Engagement	Human Resources	Financial Resources	Overall Score	Assessment	
		Low = 1	less than 1 = 1	Low = 1	low = 3-4	In Sync	
		Med = 2	1 to 3 people = 2	Med = 2	Med = 5-7	Duplication	
		High = 3	more than 3 = 3	High = 3	High = 8+	Needs Enhancement/Coordination	
						Opportunity to Improve	
		Current Activities					
Industry Training and Development	Customer Service, Hospitality Training	Seguin Township	3	0	3	6	0
		Municipality of McDougall	2	0.5	2	4.5	
		The Town of Parry Sound	0	0	0	0	
		Township of The Archipelago	0	0	0	0	
		The Township of Carling	0	0	0	0	
		Georgian Bay Biosphere	0	0	0	0	
		Parry Sound Tourism	0	0	0	0	
		Parry Sound Chamber	3	1	1	5	
		Parry Sound DBA	0	0	0	0	
	Explorer's Edge	0	0	0	0		
	Tourism Industry business development	Seguin Township	0	0	0	0	0
		Municipality of McDougall	0	0	0	0	
		The Town of Parry Sound	0	0	0	0	
		Township of The Archipelago	0	0	0	0	
The Township of Carling		0	0	0	0		
Georgian Bay Biosphere		0	0	0	0		
Parry Sound Tourism		3	1	1	5		
Parry Sound Chamber	3	1	1	5			
Parry Sound DBA	0	0	0	0			
Explorer's Edge	2	2	2	7			

Evaluation



In Sync	Duplication	Needs Enhancement/ Coordination	Opportunity to Improve	Area that Tourism Operators want coordination
<p>An ideal scenario where activities are in place that promote a healthy and sustainable tourism industry.</p>	<p>Area where several agencies are working in silos. A lack of coordination creates unnecessary redundancies and wasted resources. Can be confusing for tourism operators and consumers.</p>	<p>Activities that some organizations are playing a role in but a coordinated effort and region wide approach would be beneficial.</p>	<p>There is a lack of attention on any scale in this area. Opportunities for regional collaboration should be explored.</p>	<p>Cross referenced with Tourism Operator Survey to show the areas of focus that are most desirable for tourism growth.</p>



Ideally future efforts would move activities that are now **needing enhancement/coordination** and those that have **opportunities to improve** into this area

Tourism Activities Summary

	In Sync	Overlap	Needs Enhancement/ Coordination	Opportunity to Improve
Investment Attraction	??	??	??	O
Training and Development	??	??	??	O
Product/Experience Development	??	??	N	
Visitor Services and Signage	?	?	N	O
Community Engagement	??	??	??	O
Marketing	?	?	N	O
Motor Coach, Sports Tourism and Meetings/Conferences	?	?	?	O
Research and Planning	?	?	?	O

Tourism Stakeholder Input Summary

- There are opportunities to improve in each of the 8 strategic areas of tourism focus;
- There are missed opportunities to leverage regional initiatives without local coordination efforts in place;
- There does not appear to be a logical existing lead organization within the Parry Sound Area;
- No one agency has the mandate or resources to fulfill the current gaps/opportunity; and
- There is an appetite to collaborate.

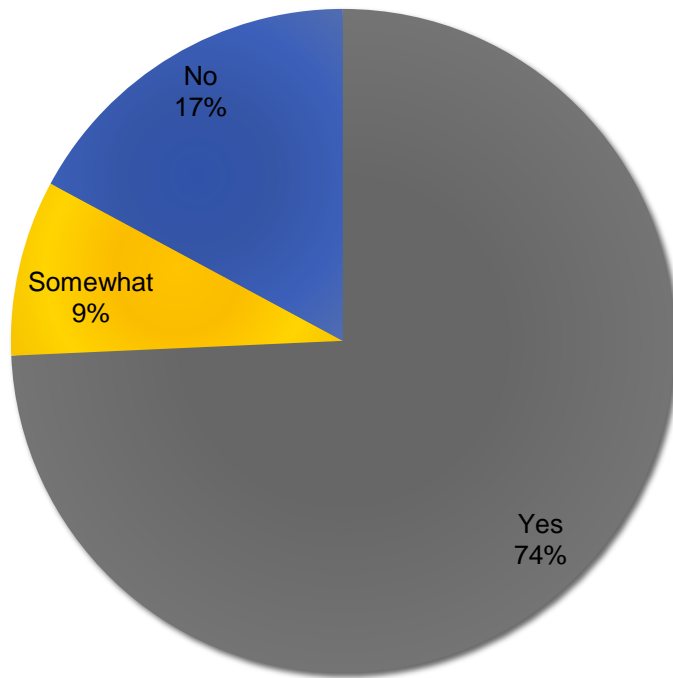
TOURISM OPERATOR SURVEY

Completed in November and December 2015

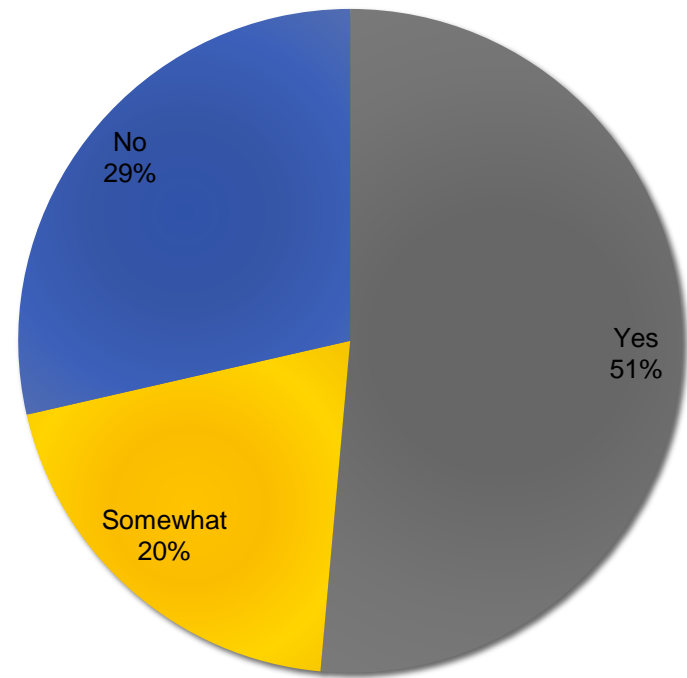
37 responses

Operator Survey Results

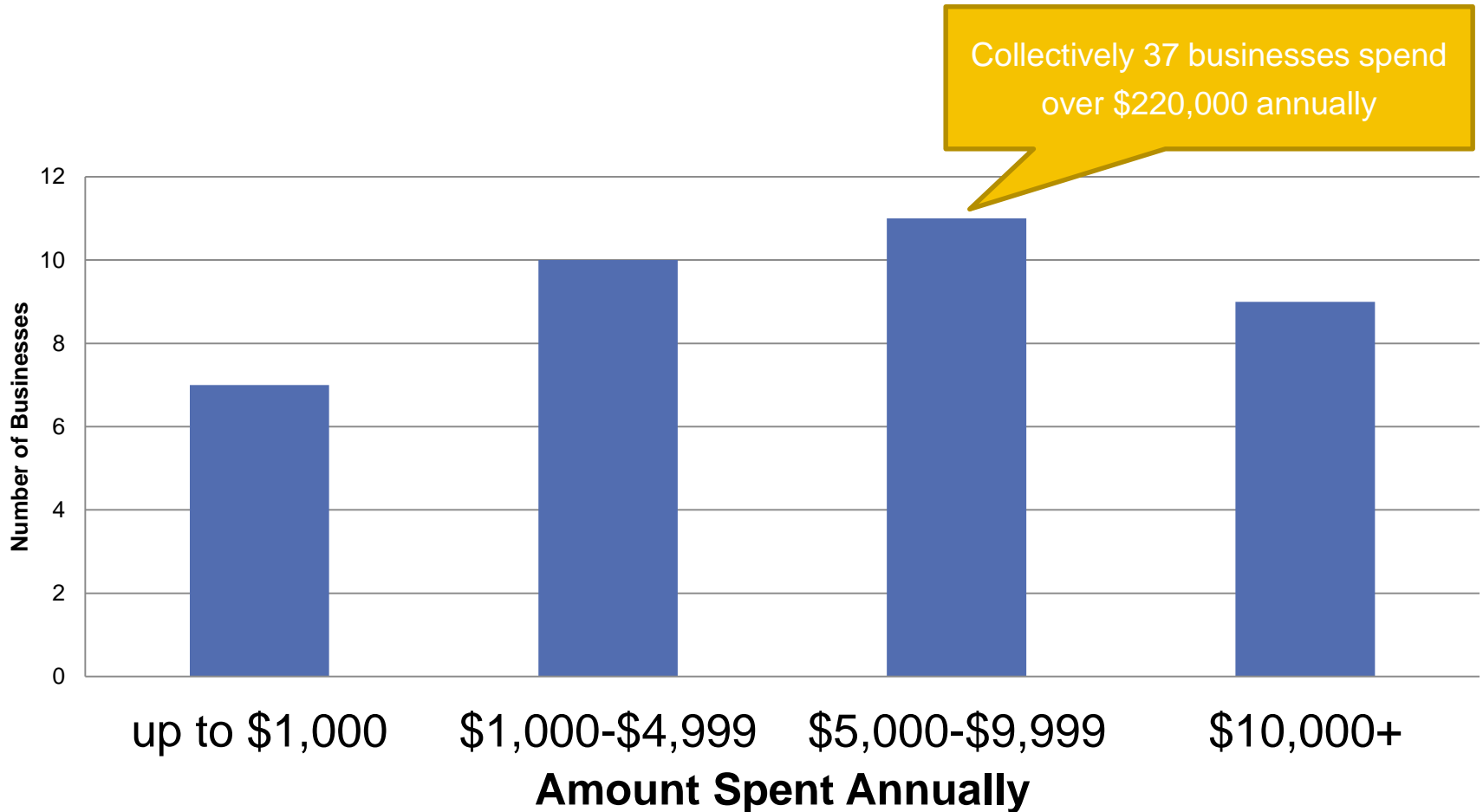
Does your business have a marketing plan?



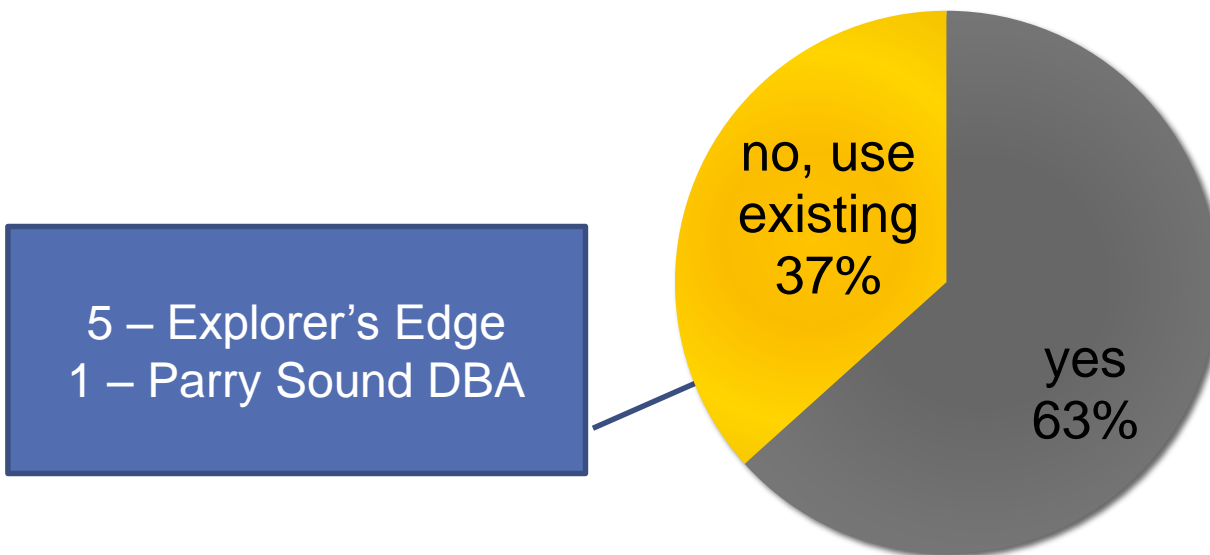
Are you happy with your marketing efforts?



How much do you spend annually on marketing?



Would you like to see a new destination marketing organization (DMO) supported by the municipalities to promote tourism? If not, is there an organization currently in existence you would like to act as the designated promoter?



Tourism Operator Input Summary

- Tourism operators want assistance locally with grass roots product and experience development;
- Tourism operators want to work with other owner/operators to create synergies, partnerships and packages but they need help facilitating this;
- Tourism operators have an appetite to work with a local DMO; and
- Tourism operators are seeking local coordination and want the entire area to work together as one.

TOURISM SUMMIT SESSION

December 15 2015

30 attendees

What areas of focus are most critical in the short term?

1. Financial support
2. Commitment of sustainable resources
3. United budget to market the region
 - Human Capital
 - Staffed Visitor Information Centre
 - Establishing a vision for tourism with measurable outcomes
4. 5 year plan
5. Cohesive marketing plan (targeted)

What areas of focus are most critical in the short term (continued)?

6. Higher per person spend
7. Reaching target markets
8. Focused approach
 - Forming a stakeholder association
9. Stakeholder involvement in tourism decisions
 - Marketing of the region
 - Establish a brand positioning
 - Leverage successful festivals and events
 - Collaboration
10. Consistency
11. Long-term commitment

What areas of focus are most critical in the mid-term?

1. Tourism Coordinator for the Parry Sound Area
2. Research and Market Knowledge
 - Understanding competition
 - Best practices and trends
3. Product Development
4. Leveraging technology
5. On-going communication with tourism stakeholders
6. Ex-patriot program to attract former resident back to the area
7. Business collaboration, packaging, partnership development
8. Explorers' Edge to set up satellite location in Parry Sound Area
9. Define "tourism"

What should local efforts look like?

Leadership Suggestions

- REDAC to take the lead to create a DMO and Visitor Information Services.
- REDAC to hire an Executive Director with board guidance stakeholders engaged as part of a tourism committee

What should local efforts look like?

Funding Suggestions

- REDAC
- FEDNOR
- Explorers' Edge
- Operators
- Northern Ontario Heritage Fund Corporation
- Municipalities
- Explore how cottage rentals contribute
- Revisit the idea of collecting a Destination Management Fund (DMF)

What should local efforts look like?

Cooperation and Support Suggestions

- On-going communication
- Minimum 3-5 year commitment to get the ball rolling and allow successful implementation that leads to a sustainable organization
- All municipalities need to buy-in
- Everyone must understand the benefits to a regional approach

RECOMMENDATIONS

How should the Parry Sound Area move forward to advance tourism?

1. Designate a Leader
2. Establish On-going Industry Engagement
3. Secure 3 years of funding for DMO activities
4. Provide Visitor Services
5. Develop a 5-year Community Tourism Plan
6. Develop an annual tourism marketing budget

Leadership

- There is a gap in regional tourism leadership for the Parry Sound Area.
- Explorers' Edge offers regional programs and some support that fills this gap, their role is pan-regional and includes providing programs for four other sub regions along with Parry Sound.
- Explorers' Edge has a minimal team and is not currently in the position to take on the role of a local DMO.
- Grass-roots, local leadership and coordination is critical if Parry Sound wishes to take part in the many programs and opportunities that are presented at the RTO level (\$1.7 M in funding).
- REDAC appears to be the most logical organization to take on the leadership role although they would need additional human and financial resources to make this happen.

On-going Industry Engagement

- A community-based approach is necessary for future success throughout the region.
- A Tourism Advisory Committee consisting of a cross section of tourism businesses with representation from each of the municipalities should be formed.
- The role of this group will be to guide and influence tourism activities of a newly formed DMO under the REDAC umbrella.

Secure 3 years of funding

- A long-term sustainable DMO model needs to be developed.
- Initially there needs to be financial buy-in from each of the participating municipalities and stakeholder organizations.
- The financial buy-in of the local group should be leveraged to secure funding for the first couple of launch years and then transition to a shared model of municipal support and industry memberships with pay to play advertising opportunities.
- ROI metrics can be in place and if the DMO is functioning optimally the buy-in from industry will be logical choice.

Provide Visitor Services

- The DMO should host the official tourism website or subcontract that role to a third party if advantageous with specific goals and measurable outcome established.
- Initially due to the support from each of the municipalities, all tourism businesses in the area should receive basic tourism promotion on the website and in any printed visitor guides.
- A physical Visitor Information Centre in the Parry Sound Area, especially during peak periods is desirable. It is suggested that this role be a shared function with an existing attraction in a high traffic area that has adequate parking and washroom facilities.
- The Visitor Information Centre should collect and report on visitor data regularly to the DMO.

Develop a 5-year Community Tourism Plan

- A tourism plan can help the Parry Sound area get the most out of tourism by maximizing the benefits and minimizing the costs and negative impacts.
- Without a plan, there is no common vision or goals for tourism and opportunities may be overlooked.
- The Tourism Advisory Committee should act as a working group to complete the plan with the help of a third party facilitator.
- The completion of the tourism plan will define the role of the DMO, RTO, and the local stakeholder groups (Parry Sound Downtown Business Association, Chamber of Commerce and Georgina Bay Biosphere) so that everyone can work to leverage the collaborative efforts.

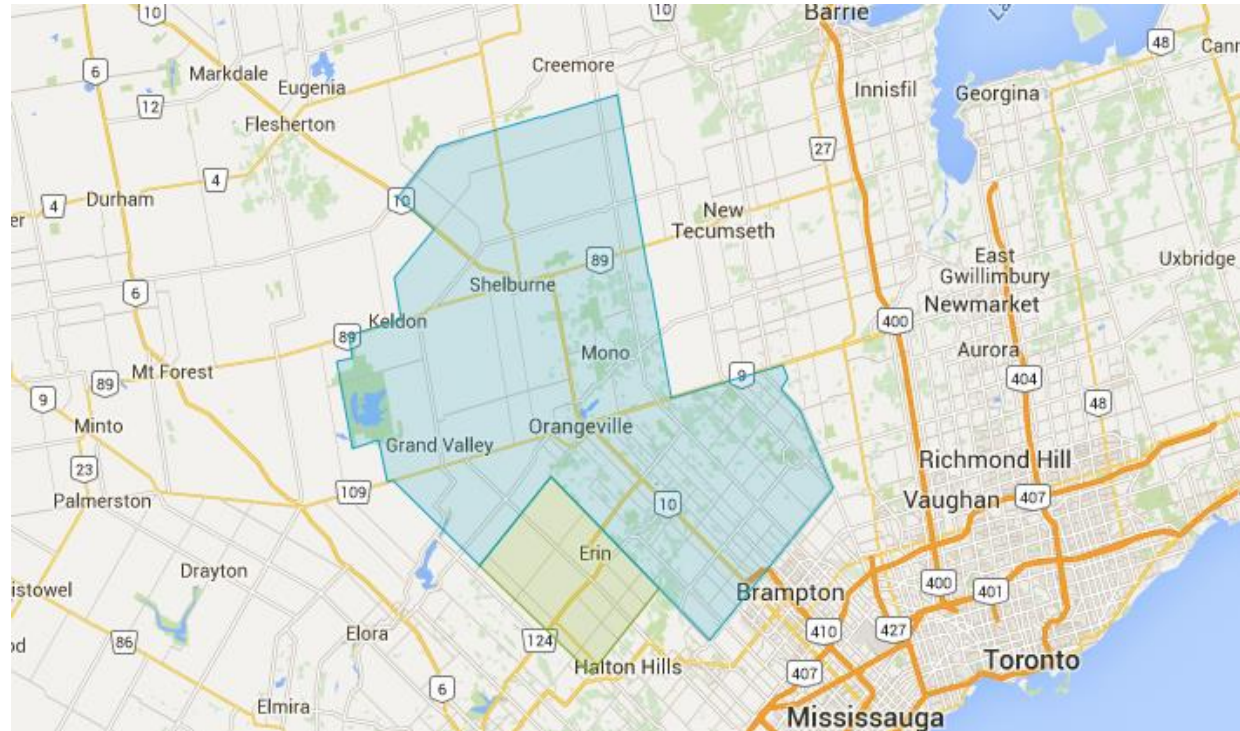
Develop an Annual Tourism Marketing Budget

- A tourism marketing plan outlines the overall marketing approach that will be used to promote the Parry Sound Area.
- Marketing plans create a customized action plan that the DMO and Tourism Advisory Committee can agree to, follow and use to measure the effectiveness of each campaign.
- The local tourism plan should seek opportunities to align with the Explorers' Edge marketing plan where possible and focus on Parry Sound Area's unique opportunities through its own targeted efforts.
- Not all of Parry Sound's unique attributes will be common to the pan-regional approach so striking a balance with a limited budget is important.

Discussion

- Is there an appetite for REDAC to take the lead in creating a new non-profit DMO for the Parry Sound Area?
 - Terms of reference
 - Creating of a Tourism Advisory Committee
 - Hiring of a Tourism Coordinator
- This would require a 3 year financial commitment from the participating partners
 - Establish Service Agreements
 - Clearly stated and measurable goals and objectives
 - Regular updates to partners (council presentations)

Others like you



From Dufferin County Website

The agreement with the Headwaters Tourism Association was extended for one year in the amount of \$69,837, subject to final budget approval. The tourism association, in partnership with the Towns of Caledon, Erin, Mono and Shelburne and County of Dufferin, provides a number of services as part of the agreement such as product development, tourism marketing, tourism marketing communications and tourism advocacy and partnership development.

Others like you



- The Hills of Headwaters Tourism Association is a regional, non-profit organization with a mandate to facilitate the development and promotion of the Headwaters region as a tourism destination.
- The Hills of Headwaters Tourism currently supports tourism businesses and organizations as well as providing tourism marketing on behalf of the communities of Erin, Caledon, Dufferin County, Shelburne and Mono.
- The Hills of Headwaters Tourism is governed by a volunteer **Board of Directors**, which are elected annually and supported by representation from our partner municipalities.



Mission:

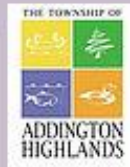
- The Hills of Headwaters Tourism Association, working on behalf of and in conjunction with our partners and regional tourism operators shall be the primary marketing and facilitating agent for regional tourism that is consistent with the region's rural heritage, respectful of its extraordinary natural environment and that promotes its spirit of community.

Approach:

- Regional collaboration is the cornerstone of the Hills of Headwaters initiative; using an integrated approach that goes beyond the means of individual businesses, groups, committees or communities.

Others like you

As an example, The County of Lennox & Addington provides \$20,00/year in funding to Land O'Lakes



Next Steps

- Final Report submitted to REDAC and Explorer's Edge
- REDAC to determine feasibility and garner support
- Report back to industry at large (tentatively March 3)

Thank you!

