

Bruce County



Premier-ranked
Tourist Destination

-

Main Report

This report has three separately bound components,
together forming the final report of
Bruce County's Premier-ranked Tourist Destination Study (2008):

1. Main Report
2. Appendices
3. Strategic Plan

Additional support materials and reference documents can be found in the three binders (and accompanying CD) submitted in May 2007 with the final PRTD workbook.

"Plans are only good intentions unless they immediately degenerate into hard work."

Peter F. Drucker. Quoted in "The Strategy Paradox". (2007). M.E. Raynor. Pg. 227.

"You've got to be very careful if you don't know where you are going, because you might not get there."

Yogi Berra, New York Yankees . Quoted in Bryson. (2004). Pg. 102.

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Preface

The Premier-ranked Tourism Destination program is just that the highest order approach to tourism planning and development in Ontario. This is a vital economic sector for Ontario and for Bruce County. Many citizens of Bruce have invested their time and ideas in this consultative process of questionnaires and focus groups. Bruce County now has this roadmap to a comprehensive and systematic approach to tourism planning and development, integrating all the players into a winning team.

This report summarizes the findings of a two-phased research process. The first phase was a ten-month study using the Ministry of Tourism's Premier-ranked Tourist Destination Framework. The findings from the Phase I Workbook report and statistics, *unless otherwise noted*, reflect general observations as determined through and based on survey returns, CTS/ITS data, and supporting research. Some findings are from independent research by the Premier-ranked Tourist Destination (PRTD) Project Team. Other findings are based on a variety of reports, including authored by or commissioned by Bruce County, TAMS reports, Statistics Canada, and the Ontario Ministry of Tourism. For a full reference list, see the Bibliography.

Throughout the workbook, references are made to specific businesses. These references are not intended to be exhaustive lists of businesses but examples of businesses to illustrate and validate responses to specific question. In some cases, the lack of business names might indicate that businesses did not respond to the survey or did not respond to a specific question.

The second phase (Phase II throughout the report), involved further consultation, expanding on and incorporating the findings from the first phase, and additional findings through a focus group, interviews, academic literature research, expert consultation, and additional studies.

The two-phase consultation process resulted in a ten-year strategic plan consisting of seven recommendations, each of which was further developed into specific deliverables and action items. The strategic plan is published as a separate document.

If these reports are treated as living documents and the plans implemented, this investment by Bruce County and senior governments in the future of one of the most significant economic development sectors for the County, tourism, promises great benefits for its citizens, and their future prosperity.

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Executive Overview

The Province of Ontario's Premier-ranked Tourist Destination (PRTD) workbook is a self-assessment tool, providing a tourist destination with a strategic process to take stock of itself, essentially a comprehensive SWOT and inventory analysis, and to identify actions necessary for future planning. It measured product, performance, and its ability to address futurity. Bruce County undertook this ambitious task between June 2006 and May 2007. The Phase I final document included a completed workbook and three large binders of supporting documents and background materials.

More than 800 businesses were contacted and asked to complete a two-part survey, that included common questions (asked of all sectors) and sector-specific questions (i.e., accommodations, marinas, golf, etc.). The final return rate was 59.4%, providing a broad input. Bruce County was the first in Ontario to utilize an on-line survey as an option (60% were completed on-line).

The next step (Phase II) was a sifting of the Phase I data and further refinement of the initial findings, through additional tourism industry consultations. A focus group, numerous interviews, and an on-line survey provided a wealth of ideas and strategies to take Bruce County into the future. Combining the findings from Phases I and II, resulted in a detailed 10-year strategic plan.

The final report consists of three documents: 1) a summary of the Bruce County tourism industry and research process (Section 1); 2) a 10-year strategic plan (Section 2); and, an appendices of supporting and reference documents (Section 3).

Key themes that emerged from the consultations:

- That Bruce County will continue to be a strong nature-based destination choice for a wide range of visitors' interests
- The pursuit of an eco-friendly or green image through becoming a green destination of choice for visitors
- That there is a need to broaden the product offerings to include more cultural and heritage products and attractions
- The need to expand niche markets
- A need to increase service standards and provide training and educational opportunities to the tourism industry

- A need to enhance the present tourism industry environment to develop more co-operative and collaborative opportunities through increased tourism and supporting industry communications
- To ensure that product development and marketing is solidly based on research
- That Bruce County and Bruce County Tourism have been identified as the key player, in partnership with business, to take on the leadership role for overseeing an annual tourism strategic planning cycle
- To continue to be competitive, future marketing must continue to be regionally oriented

Workbook and consultation findings filtered through the key themes were developed into seven recommendations (and a set of deliverables for each recommendation). These recommendations are:

Recommendation 1: Bruce County develops as an adaptable and competitive destination in harmony with its natural and cultural resources

Recommendation 2: The Bruce County Tourism Community will plan and operate responsibly for environmental, social, and economic sustainability.

Recommendation 3: Tourism in Bruce County will grow based on outdoor and indoor attractions and activities, complementing and expanding the numbers of experiences available and the tourism season.

Recommendation 4: Community engagement and development is vital to authentic achievement of the Vision and requires educational programmes in service and regional tourism knowledge, plus an enthusiasm for the stories, including heritage, cultural, and natural, that uniquely identify our communities.

Recommendation 5: Co-operation and enhanced communication, through the annual research, planning, monitoring, measuring, and evaluation cycle, lead to professionalizing and de-politicizing the management and marketing of tourism in Bruce County.

Recommendation 6: The Bruce County Tourism Industry supports the importance of a regional marketing strategy that leads to increased numbers of visitors seeking niche experiences, that emphasises diversity, and keeps the brand promise of personal attention. A regional strategy is important but is subservient to the needs of Bruce County residents, businesses, and organizations.

Recommendation 7: Bruce County will undertake a review of the brand that is “Bruce County” to ensure that product offerings and experiences are in harmony or consistent with the brand.

In addition, two statements were developed, to guide tourism development in Bruce County. The “vision of success” is, essentially, a grand recommendation. The “statement of values” includes aspects of sustainability, respect, and service standards.

Vision of Success

Tourism in Bruce County will grow based on building community capacity for sustainable, environmentally responsible and enriched experiences for visitors and residents.

These experiences will be available for a wider spectrum of visitors and their interests, over a longer tourism season.

Authentic experiences based on Bruce County’s wealth of natural and cultural resources will be enhanced by the augmented knowledge and hospitality of all communities.

Statement of Values¹

The people of Bruce County value its natural and cultural resources, and the unique qualities of its environment.

The communities of Bruce County value the contributions all people make to meeting the challenges of providing high quality experiences and opportunities to visitors in an informed and hospitable manner.

¹ The statement of values also includes a set of operators’ values and visitors’ services values. See the strategic plan.

1. Introduction

1.1 Premier-ranked Tourism Destination: The Process

Bruce County embarked on a PRTD analysis of its current levels of tourism marketing, tourism product offerings, and its futurity or capacity to develop further to meet the potential market needs and opportunities as tourism becomes central to the economic development strategy and reality of the Bruce County economy. After initial work in 2005 and early 2006, in June 2006 a team was hired to undertake Phase I using the PRTD Workbook.

The Premier-ranked Tourist Destination (PRTD) research process included completion of the workbook, surveys, interviews, focus groups, the identification of strengths, weaknesses and gaps, and additional research into best practices and published materials reflecting the state-of-the-industry. This detailed research has been synthesized into a 10-year Strategic Plan for the County of Bruce *tourism industry*.

This is an important point: This report, and its companion strategic plan, are directed at the Bruce County tourism industry, and not at any one entity - all stakeholders are identified as essential partners for success. The expectation is that the industry (through committees and workgroups) will take responsibility for implementing the strategic plan, share the workload, and take ownership of tasks necessary to move forward.

The process also identified many gaps where the needed research has not been done and data not yet collected. Serious information gaps exist in many areas, which need to be remedied as a first step in implementing the strategic plan.

This report, a companion to the 10-Year Strategic Plan, provides details and summaries of the whole research process, Phases I and II. The Phase I results in this report formed the basis for the 2007 Phase II work of tourism industry consultations and the first exercise of the Bruce futurity capacity, which is the production of the stakeholder-directed, 10-Year Strategic Plan for Bruce County tourism development 2008 to 2017.

1.2 Premier-ranked Tourism Destination: Current Status

While the Phase I research showed that Bruce has key attractions and services that are at the Premier-ranked level, the overall score for Bruce tourism in the evaluation system was not at the Premier-ranked level. That also means that there is room for improvements and real opportunities for significant growth. At the same time, the carrying capacity limits need further research and the threat to the unique Bruce ecosystems from global warming is a very serious factor requiring much further study.

The strategic plan has been built on seven (7) recommendations. These recommendations were developed from the detailed analysis of Bruce County's strengths, weaknesses, and gaps. The ultimate goal is to make Bruce County the "best that it can be" as a tourism destination and as a high quality environment for its residents. Whether or not this means aiming to achieve "premier-ranked status", as defined by the PRTD process is, ultimately, up to the Bruce County tourism industry and broader community to decide.

2. Bruce County Premier-ranked Tourist Destination: The Process²

2.1 Process Overview

Leading tourist destinations are constantly trying to distinguish themselves in the marketplace. Some present themselves as "Premier-ranked Tourist Destinations". Many now focus on developing integrated touristic "experiences" based on authentic and unique natural and cultural resources.³ Others aspire to achieve that status, but aren't exactly sure of what they're seeking or how they'll know when they get there. Still others are more concerned with operating at the highest level within their reach than they are with any label.

The word "premier" is typically defined to mean first in rank, position, importance or quality. Being a Premier-ranked Tourist Destination (PRTD) is considered important because it says, "here is a place more attractive than the rest", a place the potential tourist should consider first in making travel plans. The framework and its workbook were designed to allow community (small or large) to undertake a self-assessment or SWOT regarding product, performance, and develop a plan of action for change and improvement. Strictly speaking, the process was aimed at answering the question: "Can Bruce County consider itself a Premier-ranked Tourist Destination?" Bruce County used the approach to assess its resources and potential, not to position itself with communities that had implemented the process. Once completed, the PRTD findings will be used "to become better and the best we can be, given our resources".⁴

Feedback, through focus groups and interviews, indicates the industry is ready to become more deeply involved in planning its future. This finding underlies the recommendations, the deliverables, action items.

² Parts of this section have been extracted from the "The Premier-ranked Tourist Destinations: A Self-guided Workbook". See Bibliography for reference.

³ See for example Pine and Gilmore (1999). "The Experience Economy".

⁴ Hughes, C. (2007). Personal e-mail communication.

In order for quality and success to be maintained over time, Bruce County must be marketed, and products renewed and managed, in a co-ordinated, sustainable manner. These essential dimensions are product, performance, and futurity (Table 2). As expressed in this structure of dimensions and supporting elements, the framework provided a tool for Bruce County to assess its position in the marketplace. Fundamentally, the framework was designed to identify strategic targets for a destination as it strives to improve its performance in the very competitive tourism marketplace.

Section 2.2 summarizes the PRTD Workbook structure.

The primary task of Phase II of the PRTD study was the development of a 10-year, detailed plan through a review of documents and research from Phase I, additional participant input through a focus group, interviews, additional research, a Web-based, online survey, and a review of a variety of academic and government reports and studies. The result is a well-informed plan, with significant industry input. The plan strongly reflects what the industry feels it *wants* to achieve, and what it feels it *can* achieve. The plan is also informed by industry input, research, sound best practice findings, and consultant input.

2.2 The PRTD Workbook

The Premier-ranked Tourist Destinations Workbook is a manual designed to guide its users through an assessment of a tourist destination's market status. It evaluates performance against measures defined in the Premier-ranked Tourist Destinations Framework. The Framework addresses the attributes/factors/conditions necessary if a destination is to be perceived as being among the Premier ranked. The approach is relevant to any destination with an interest in improving sustainable market performance.

The Framework argues that a premier-ranked destination must show well above average performance across Product, Performance and Futurity dimensions:

THE PRODUCT DIMENSION:

A Premier-ranked Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:

- A. Distinctive Core Attractions;
- B. Quality and Critical Mass;
- C. Satisfaction and Value;
- D. Accessibility; and,
- E. An Accommodations Base.

THE PERFORMANCE DIMENSION:

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

- F. Visitation
- G. Occupancy and Yield; and,
- H. Critical Acclaim;

THE FUTURITY DIMENSION:

and sustained by:

- I. Destination Marketing;
- J. Product Renewal; and,
- K. Managing within Carrying Capacities.

Each of these elements (A to K) is supported by criteria and measures. The Workbook guides the user through the evaluation process step by step. It outlines why and when use of the Workbook might be considered, describes how to complete a resource audit, and identifies how to respond to the measures. It shows how to complete a summary analysis of performance, and determine whether the destination achieves premier-ranked status. The Workbook concludes with guidance on converting the insights gained from the analysis into an agenda for action.

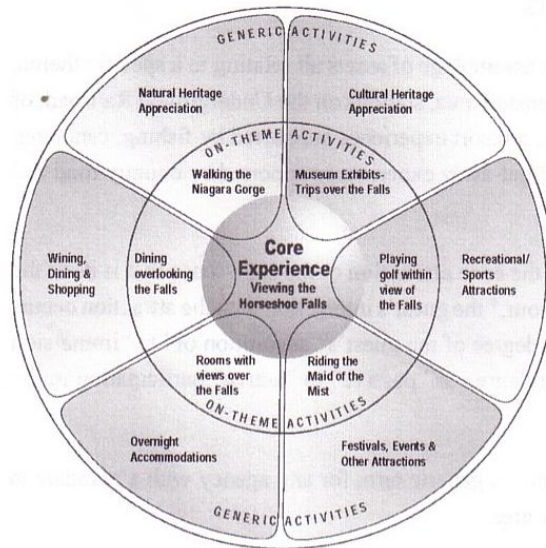


Figure 1: An Example of Core, On-theme, and Supporting Activities (using Niagara Falls).

Several terms require definition to fully understand the concepts used in the process. As well, the model of a “tourism experience” (Figure 1) includes several dimensions, core attraction/experience, on-theme activity, and supporting/generic activities.

Core Attraction: The feature(s), facility(ies), and/or experience which act as the primary motivators for most travel to the destination; the attractions

with the most tourist visits in the destination. Core attractions can differ from season to season, as in for example golf vs. skiing at a four seasons resort destination. **Core Experience:** The guest's experience of the core attraction or the experience that is itself the core attraction.

On-Theme Activities: Activities (uses made of features or facilities) that are related to the **core attraction** or the core experience.

Supporting Attraction: Features or facilities that draw guests to the destination area by giving additional but secondary reasons to travel there.

The Premier-ranked Tourist Destinations Workbook, as a tool, was used to measure the status of Bruce County as a tourist destination and identify issues for future consideration. The workbook accomplished the following:

- 1) captured the attributes/factors/conditions considered necessary for a tourist destination to be perceived as a Premier-ranked Tourist Destination;
- 2) identified weaknesses and gaps that must be addressed;
- 3) identified strengths and opportunities that might be used to create sustainable competitive advantage; and,
- 4) provided a focus for building an expanded network of tourism stakeholders, and consensus on future priorities for action.

The steps involved in the process were:

EVALUATION:

- Step 1 - Complete the Resource Audit
- Step 2 - Measure destination Product
- Step 3 - Measure destination Performance
- Step 4 - Measure destination Futurity

INTERPRETATION:

- Step 5 - Complete the destination Performance Summary
- Step 6 - Determine whether destination is among the Premier-ranked

PLANNING:

- Step 7 - Determine next steps in tourism development for the destination

This work sequence illustrates key steps in the necessary annual planning , monitoring, measuring, research, and evaluation Strategic Planning cycle required to carry forward all of these opportunities and developments. The Strategic Plan Report provided more details for this commitment.

3. Research

3.1 Phase I Research: The Workbook

3.1.1 Methods and Responses

The Premier-Ranked Tourist Destination Project (PRTDP) was staffed and began work on 27th June 2006, completing its task on 4th May 2007.

More than 800 businesses were contacted and requested to fill out a detailed survey.⁵ Surveys were distributed through mail-outs, e-mails, and links from the project Website, followed up with telephone calls, personal visits, and reminder post cards. Several media releases were sent out as well. A PRTD Website was set up to provide additional information about the project and as a means to post project updates.

Both paper and electronic surveys were available to tourism operators. Bruce County was the first in Ontario to use on-line, Web-based surveys to facilitate electronic survey completion and data entry. The paper-based surveys were converted into electronic form, using SurveyMonkey.com as the host Website. Data analysis and brief reports were done for each sector (i.e., golf courses, accommodations, festivals/events, etc.) and the common core survey questions were compiled to generate an overall industry profile. Of the all returns, 188 were returned by mail and 287 were completed on-line, for a final return rate of 59.4% (n=475). The survey returns, by sector, are shown in Table 1.

Table 1: Final Return Rates by Sector

| Sector | Percentage |
|----------------------|------------|
| Marina | 75 |
| Adventure/Outfitters | 73 |
| Accommodations | 69 |
| Attractions | 68 |
| Golf | 60 |
| Retail | 56 |
| Tours | 45 |
| Food and Beverage | 44 |
| Festivals | 42 |
| Skiing/Snowboarding | 33 |
| Winery/Brewery | 0 |

Source: PTRD Workbook

⁵ The PRTD surveys can be found in the Phase I report.

Data gathered through the surveys were used to complete the PRTD Workbook. Additional independent research, and data provided by the Ministry of Tourism, rounded out the information needed for the workbook. Through focus groups, the PRTD Advisory Committee provided additional input and feedback regarding the workbook and Phase I findings.

3.1.2 The Gaps in the Research and Knowledge Base

A number of gaps were identified through the Phase I (PRTD Workbook) process particularly regarding culture/heritage (Workbook Section B) and carrying capacities (Workbook Section K).

Information about culture and heritage resources and programmes information was hard to locate and the arts community was equally hard to identify (see Section B5 of the PRTD Workbook). Centralized collection and evaluation of statistics related to events (such as powwows, music festivals, nature-based) does not exist. Often, event organizers do not have the time, expertise, nor financial resources to collect participant data (e.g., through surveys). In some cases, there is a desire to collect and analyse visitation data but gets moved down the list of priorities due to a lack of resources. Data are only available at the county level from the Canadian Travel Survey (CTS) which permits only very broad understanding of the indicators and what they mean.

Survey returns from the arts and culture community were low and reflect two issues: 1) difficulty in identifying members of the community; and, 2) low survey return rate possibly due to a lack of understanding of how members fit into the “tourism picture”. Surveys distributed through a number of artists’ co-ops also resulted in a low return rate. Elsewhere in this report (7.1.2.1 Next Step Process Opportunities) is a suggestion to use the province’s municipal cultural planning (MCP) initiative to identify cultural tourism potential of Bruce County. Cultural and heritage tourism is one of the fastest growing sectors but requires a sound understanding of resources, existing and new markets, and identification of cultural community leaders to help move it forward. MCP, as a tool, can be helpful.

At the county, municipal, and attractions levels (e.g., National Park), carrying capacity (roads, water, sewage, environmental), has, for the most part, been assessed as adequate for the near future and continues to be monitored. Several peak periods (long weekends, prime summer vacation periods) put excess stress on these facilities. (See Section 6.4 Managing Within Carrying Capacities for a more detailed discussion.) The present gap in information includes detailed assessment of infrastructure against future demand. An analysis of a wider variety of stressor indicators (social, environmental, physical, and economic) could add significant benefit to the on-going research and planning cycle (see Section 3.3 On-going Research).

3.1.3 Research Results and the Stakeholders

The main finding, as defined by the process and criteria in the Workbook, was that *Bruce County could not be considered as a Premier-ranked Tourist Destination*. An important secondary finding was that Bruce County *can be considered a premier-ranked outdoor destination*.

Other findings indicated several areas of weakness. Of the eleven “product elements”, two were rated “almost achieved” and two were rated “not achieved”. All seven others were rated “yes”, achieved. Quality and Critical Mass were rated “almost achieved” and Visitation, and Occupancy and Yield were rated “not achieved”. Generally, the tourism resources did not have a wide range of products to serve from lower-end/mass to higher-end tourists and there was not enough hard evidence (data) to indicate how well operators were doing in serving the tourists (visitor feedback). Second, Bruce County’s share of the province’s total visitors was not high enough (as a percentage) generally and in specific categories (i.e., overnight, same day). Third, the strong seasonal nature of Bruce County’s tourism factored against the premier-ranked rating (occupancy and yield).

The Workbook, as an end product report, can be used as a resource to address weaknesses and develop strategies (as defined by the premier-ranked process), or to anticipate future issues if the status quo of the industry and tourism experiences were only maintained and not enhanced. However, Bruce County Tourism deemed it desirable to take the process further. The development of a detailed, 10-year strategic plan was identified as the next step. As a result, the Workbook, and other supporting documents from Phase I, became the background for the development of a detailed plan.

Table 2 summarizes the findings from the workbook process.

Table 2: The Premier-ranked Tourist Destinations Framework and Ratings for Bruce County

| | | |
|--|--|--|
| <p>PRODUCT DIMENSION</p> <p><i>Can these Dimensions be affirmed as having been met? ALMOST</i></p> | <p><i>A Premier-ranked Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of <u>these elements</u>:</i></p> <p>A. <u>Distinctive Core Attractions</u></p> <p>B. <u>Quality and Critical Mass</u></p> <p>C. <u>Satisfaction and Value</u></p> <p>D. <u>Accessibility</u></p> <p>E. <u>An Accommodations Base</u></p> | <p>Achieved for Bruce County?</p> <p>YES</p> <p>ALMOST</p> <p>ALMOST</p> <p>YES</p> <p>YES</p> |
| <p>PERFORMANCE DIMENSION</p> <p><i>Can these Dimensions be affirmed as having been met? NO</i></p> | <p><i>The quality of the tourist experience and the destination's success in providing it is validated by <u>these elements</u>:</i></p> <p>F. <u>Visitation</u></p> <p>G. <u>Occupancy and Yield</u></p> <p>H. <u>Critical Acclaim</u></p> | <p>NO</p> <p>NO</p> <p>YES</p> |
| <p>FUTURITY DIMENSION</p> <p><i>Can these Dimensions be affirmed as having been met? YES</i></p> | <p><i>And sustained by <u>these elements</u>:</i></p> <p>I. <u>Destination Marketing</u></p> <p>J. <u>Product Renewal</u></p> <p>K. <u>Managing within Carrying Capacities</u></p> | <p>YES</p> <p>YES</p> <p>YES</p> |

Source: PRTD Workbook. (May 2003). Ministry of Recreation and Tourism, and Bruce County's Completed Workbook.

3.2 Phase II Research: The Stakeholders Consensus

3.2.1 The Focus Group and Interviews

An tourism industry focus group was held on 21st August 2007 to secure feedback and an analysis of data from Phase I, and to gather additional expert information for developing key components of the strategic plan. To facilitate the feedback, a number of exercises were developed. Probes were used to generate responses. Each exercise is briefly described below and transcriptions can be found in Appendix B.

The original intent was to hold two focus groups. Due to a low response rate to the second focus group, twelve interviews were undertaken as a means of gathering additional input. To allow focus group and interview feedback could be merged, interviews were structured using the same questions as used during the focus group. The only exception was that the posting of ideas and issues on a 10-year timeline exercise was not done with interviewees.

Interview questions were not given to participants in advance so responses were “top-of-the-mind”. Notes were taken in point-form (no recordings) by the consultant although some notes are in fact “quotes” while others are paraphrased, keeping the intent and flavour of the response. The interview process did allow for deviation from prescribed questions when a participant wanted to explore an idea further, the same for the interviewer. Most interviews were done in person with a few done via the telephone. Transcriptions of the interviews is provided in Appendix C.

In the first exercise, participants were asked, as a group, to develop a scenario of the future of tourism in Bruce County based on the status quo. In other words, what did the future look like if nothing was changed regarding the way all tourism-oriented interests (businesses, groups, organizations, and governments) were doing business.

The second exercise asked participants to identify words and phrases that they felt should be included in VISION and VALUES statements. Vision was defined as the future of tourism in Bruce County. Values were defined as core beliefs, ethics, and philosophies to guide the way of doing business.

Participants were then asked to agree or disagree with the list of attractions that had been defined as core, on-theme, and supporting attractions in Phase I. Specifically, did they agree with the list? Would they add anything or move anything from one list to the other? Were there any attractions missing completely?

To determine future actions (futuraity) participants were asked to independently identify specific actions, experiences, and ideas that could be undertaken to enhance Bruce County's tourism experience. This exercise was done by sticking post-it notes on a matrix of flip-chart paper that formed a 10-year timeline. The second step of the exercise involved each participant using ten, coloured stick-on “dots” to vote for those attractions and actions they felt were the most important. The result was a timeline of actions for change and priorities.

Very simply, participants were asked to identify organizations and individuals that they felt should be responsible for taking the lead in implementing the Strategic Plan and Action Plan.

The sixth and last exercise was for participants to identify what they believed would be indicators of success, indicators of achieving change and growth.

Although not a formal focus group activity, but, quite independently, participants identified what they believed were barriers to change or impediments to growth.

3.2.2 The On-line Survey

To gather tourism industry feedback about issues and ideas raised through the focus group and interview process, a short survey was developed and made available on the Internet through SurveyMonkey.com. The survey focused on four key areas:

- words and short phrases that could be used to create Vision and Values statements
- product developments and enhancements
- other ideas for improving the tourism in Bruce County
- identifying leadership and support for tourism initiatives

The survey was made available from the 28th September to the 5th October 2007. Notification about the survey was sent via e-mail by Bruce County Tourism to its list of tourism operators which included some non-Bruce County businesses. An initial response rate of 108 was reduced to 77 usable surveys. Non-county resident businesses and incomplete surveys (those with no question responses after identifying their municipality) were removed. Although too few in number to be helpful, the perspective of non-resident business owners might have been informative and should be considered as a strategy in future research initiatives.

Survey responses, as shown in the Table 3, are clearly biased to the two northern Bruce County municipalities, with 67.6% coming from north of Highway 21.

Table 3: Survey Responses by Municipality

| Municipality (associated towns and villages) | Responses n=77 % |
|---|------------------------|
| Northern Bruce Peninsula (Tobermory, Lion's Head) | 44.2 |
| South Bruce Peninsula (Sauble Beach, Wiarton) | 23.4 |
| Saugeen Shores (Port Elgin, Southampton) | 10.4 |
| Huron-Kinloss (Ripley, Lucknow) | 6.5 |
| South Bruce (Teeswater, Mildmay) | 5.2 |
| Kincardine (Kincardine) | 3.9 |
| Brockton (Walkerton) | 3.9 |
| Arran-Elderslie (Chesley, Tara, Paisley) | 2.6 |
| Chippewas of Nawash First Nations | 0.0 |
| Chippewas of Saugeen First Nations | 0.0 |

The responses can be considered only suggestive of an industry-wide perspective because a count of businesses by sub-sector (i.e., food and beverages, accommodations, events and festivals, marinas, etc.) was not available. Of all responses, most (67.6%) came from the two northern municipalities and 88.4% of responses represent the five shoreline municipalities. Nonetheless, the responses are helpful in adding to an understanding of a county-wide, industry perspective of the issues, values, and in identifying what is important to business owners. Future industry-wide surveys should seek a more inclusive sample.

The on-line industry feedback survey provided helpful insight for guiding the setting of priorities for specific actions. As well, this feedback was helpful in confirming the content of the Vision and Values statements. The use of an on-line survey also indicates its usefulness as a tool for gathering feedback from the tourism industry and should be considered for future strategic planning exercises.

A reading of the written comments speak to the enthusiasm business owners have for Bruce County, and frustration with a lack of co-operation and a sense of competition amongst a wide variety of tourism promoters (i.e., chambers, associations, municipalities). These enthusiastic business operators are the sector champions, the leaders who need to be sought out and their talents and commitment harnessed. See Appendix D for a detailed summary of the on-line survey results.

3.2.3 Additional Literature and Industry Reviews

To enhance understanding of the current and ever-changing tourism industry, additional materials were continuously reviewed. The Canadian Tourism Commission's (CTC) monthly publication, *Tourism*, provided state-

of-the-art and best practices brief articles, often highlighting tourism trends and new development and marketing strategies. The daily CTC's daily e-mail was likewise reviewed. Researches in the academic world are publishing a wealth of highly relevant and timely articles, many of which have direct application to the Bruce County situation. These have been referenced throughout as resources that could be of value in applying the strategic plan (but are not necessary). Tourism published academic research is more and more becoming aimed at the industry itself, with real value and real application. The European Commissions "Early Warning System" as a tool to monitor a destination's well-being was discovered through this broader review of practical and applicable academic research (see Section 3.3). Tourism operators might consider subscribing to the CTC's free publications as quick and easy updates of the state of the industry. Other sources were reviewed and are referenced throughout the report and the strategic plan. The bibliography lists most sources referenced (Appendix A).

3.3 On-going Research

The tourism market place is in a state of constant change and the tourists' changing loyalties and commitments to particular tourism products and destinations cause sudden changes in demand.⁶

Factors outside of the direct control of tourism operators and marketers (DMOs) can have profound affects (negative and positive) on destinations. Water pollution, rising crime rates, declining water levels, changing values of domestic and foreign currencies, and new attractions and emerging destinations seem to conspire against existing and traditional destinations.

To identify and combat such changes, constant vigilance is needed. The PRTD workbook has sage advise regarding on-going research: "After a year or several have elapsed, it will likely be appropriate to repeat the Workbook process and update your assessment of the market status."⁷ As well, in the introduction to the workbook, a number of reasons are given as reasons why the PRTD process (or similar evaluation process) should be undertaken. These mostly "relate to enjoying the benefits of a clear appraisal of your current competitive position in the tourism market place" and include:

- develop a solid foundation for development strategies;
- undertake branding or re-branding;
- assess strengths and weaknesses in a disciplined manner;
- establish consensus on goals and objectives;
- attract investment;
- justify on-going investment;
- assess shifts in visitation; and,

⁶ Tourist loyalty is a growing field of research and is having important impacts on marketing strategies for many tourism destinations.

⁷ PRTD workbook. 2nd edition. (2003). Page 62.

- measure changes since the last market assessment.⁸

What is important is to be aware of potentials, monitor trends, and make research-based decisions. This need for on-going assessment is reinforced by the Canadian Tourism Commission (CTC) through its monthly publication, "tourism: Canada's tourism business magazine". Leading edge tourist destinations approach tourism development from a tourism area life cycle (TALC) perspective, recognizing that destinations, like all products, have the potential to stagnate or decline if not managed through strategic planning built on research.⁹ The European Commission recognized the need for such vigilance and developed an early warning system and preventive best practices toolkit, which Bruce County should consider adopting.¹⁰ As an alternative, the consultants have developed a draft research strategy that could be adopted (see Section 3.4).

Bruce County has been active in using research to inform decision-making (see Table 35). With the PRTD process now complete, Bruce County is at a juncture of development choices. Continuing to use research in marketing and planning, Bruce County will, to the best of its ability, be able to ensure success. The tourism industry itself has stated it would like to be more involved and this involvement could be accomplished through broader industry representation at the various planning tables.

3.4 A Sample Research Agenda

A draft research agenda is provided for review and modification as needed. A timeline schedule is provided as a guide, with suggested minimum frequency of review for each element and a suggested start date for the research agenda and each element. (See Table 4)

Initially, a research co-ordinating team or committee should be established, terms of reference developed, and an annual research budget set. Members of the team of committee could come from the broader tourism industry as set out in the recommendations and deliverables.

The strategy is to go beyond the standard tourism indicators of raw visitation numbers and annual changes, to capture other qualitative and quantitative indicators of tourism impacts. The PRTD workbook, as a process, is an intensive process to be replicated with any regularity. The process, though, has provided a baseline of data and indicators from which to measure

⁸ *ibid.* Page i.

⁹ See TNOInro. (2002).

¹⁰ See TNOInro. (2002). The toolkit is, in fact, a set of tools and includes background information about destination decline and decline indicators, strategies to combat decline, and a framework for an early warning system. The "balanced scorecard" is presented as one early warning process.

change, both good and bad. The draft model (Table 4) could be used as a starting point for such an annual report. Development of a research-based model is beyond the scope of this report and a recommendation is to seek funding from the Ministry of Tourism to develop a test model that could be used in Bruce County and other communities. The academic research community has developed a base of research findings regarding tourism indicators that help identify both healthy and declining tourism destinations that could prove very useful in developing such a model. Bruce County could take a leadership role in promoting the development of an annual early warning system.

The outcome of an early warning system is to identify areas of change before they become areas of weakness, and to address them in a pro-active manner. Understanding Bruce County as a “product” or a collection of “tourism products” that have product lifecycles will allow the industry to quickly respond to changes, as a pro-active action, to stay ahead of the competition.

Table 4: A Draft Comprehensive Tourism Research Strategy and Reporting Cycle

| Draft Comprehensive Tourism Research Strategy and Reporting Cycle (including elements for an "Early Warning System") | | |
|--|---|---------------------------|
| Elements to be considered for inclusion and possible sources of information | Minimum Frequency of Initiative | Start Date |
| <i>Establish terms of reference and budget for the research strategy</i> | | Winter 2007/08 |
| Basic review of Statistics Canada's tourism surveys | Annual | Spring 2008 |
| Detailed review of Statistics Canada's tourism surveys | Biennial | Spring 2009 |
| Assessment of the competition; other areas offering similar products (CTS/ITS data) | Annual | Fall 2008 |
| Evaluate public sector perceptions of tourism sector (community forums, surveys, forums) | Annual with each municipality on a 3-year cycle | Spring 2008 |
| Review academic literature (journal indexes) | Annual or bi-annual | Winter 2007/08 |
| Review published reports: government and NGOs (e.g., TAMS, WTO, universities, Ministry of Tourism's Business Plan and Travel Price Index, Canadian Tourism Commission's Business Plan) | Annual | Spring 2008 |
| Forums for Chambers of Commerce, Tourism Associations, and Economic Development Officials | Annual | Fall 2008 |
| Monitoring investment in commercial properties (municipal building permits, GB Real Estate Board) | Biennial | Spring 2008 |
| Assessment of traffic and traffic flows (provincial reports, Chi-Cheemaun data, Bruce County traffic data) | Annual | Spring 2008 |
| Monitor spatial changes of tourism infrastructures (polygon maps of tourism infrastructure) | Triennial | Fall 2008 |
| Tourism Location Quotients and Tourism-potential Index ¹¹ Statistics Canada's tourism surveys | Annual | Fall 2008 |
| Economic Impact Assessment (Ministry of Tourism's TREIM model) | Annual | Fall 2008 |
| Industry related statistics such as accommodations occupancy rates, attractions visitations | Biennial | Fall 2008 |
| Review and assessment of demographic statistics (Statistics Canada) | Every five years (census years) | Spring 2007 (2006 census) |

¹¹ See Clark for the Tourism-potential Index (T-PI). (2003).

| | | |
|---|--|----------------|
| Survey of elected official to assess position on tourism (Bruce County Council, Elected Municipal Officials) | Biennial | Fall 2008 |
| Tourist/Visitor feedback surveys | Annual | Fall 2008 |
| Media feedback (newspapers' news coverage, editorials including letters-to-the-editor) | Continual monitoring and compilation for annual report | Winter 2007/08 |
| Ecological Footprint (research tools to assess visitors' ecological footprint as an indicator of sustainability; see Hunter and Shaw, 2005) | Biennial | Fall 2008 |
| Environmental health (Health Unit water quality reports, beach postings reports, Blue Flag statuses, source water reports, etc.) | Annual | Fall 2008 |
| Employment/unemployment health (Service Canada's Labour Market Reports, GBHPGT Training Board) | Annual | Fall 2008 |
| Monitor the ratio of and changes to permanent homes to seasonal homes (MPAC, Tax Rolls of municipalities, Bruce County Reports) | Triennial | Fall 2008 |
| Provide feedback report to the Tourism Industry | Annual | Spring 2009 |

4. The Product Dimension

The Product Dimension includes five elements:

- A. Distinctive Core Attractions;
- B. Quality and Critical Mass;
- C. Satisfaction and Value;
- D. Accessibility; and,
- E. An Accommodations Base.

The product dimension assesses Bruce County's core, on-theme, and supporting attractions, "their distinctiveness, and the nature and size of the visitor markets to which they are considered to be attractive."¹²

The following section not only summarizes the workbook, but incorporates findings and data from other sources, pertinent to Bruce County's product offerings.

¹² PRTD workbook. Page 17.

4.1 Distinctive Core Attractions Findings

*OVERALL RATING FOR DISTINCTIVE CORE ATTRACTIONS:
"Can the Distinctive Core Attractions Element be affirmed? - **YES**"*

Criteria and Measurement include:

- why the destination is distinct in the marketplace
- how the attractions are distinguished/outstanding
- how the offerings are relevant to market wants

Bruce County's present strength is built on its natural history, its geology and ecology. Its "product positioning statement" is:

To position Bruce County as the number one 'nature-based' outdoor destination in Ontario.¹³

Canadian Travel Survey (CTS) and International Travel Survey (ITS) 2004 data indicate that, other than shopping and visiting friends and relatives, nature-based activities have the highest participation rates (same-day and overnight) of all reported activities. These activities include outdoors and sports (757,000 participants), sightseeing (577,000), and visiting national and provincial parks (285,000). Within the outdoor and sports category, several activities have high participation rates: walking/hiking (430,000), swimming (380,000), "other sports and outdoor activities" (147,000), boating (116,000), and fishing (113,000).

From these indicators, the resource audit determined that Bruce County's core attractions are:

- Beaches: Port Elgin, Southampton, Sauble Beach, and Kincardine;
- Bruce Peninsula National Park;
- Fathom Five National Marine Park;
- Provincial Parks: MacGregor, Inverhuron, and Sauble Falls; and
- Niagara Escarpment and the Bruce Trail.

Participants at two workshop sessions¹⁴, attended by key tourism operators and personnel representing DMOs, identified these same attractions as "demand generators", along with others (e.g., festivals, paddling, gardens, etc.).

A study by the Ontario Ministry of Tourism¹⁵ of American travellers (north-eastern and Great Lakes states) gives further support for these core/icon destination attractions. Awareness ratings were high for the Niagara

¹³ Bruce County's Tourism marketing and promotions strategy. (2007).

¹⁴ Product development analysis. (Undated, circa 2004). Unpublished.

¹⁵ Ministry of Tourism. (2006). The awareness ratings of Ontario's outdoor destinations by American travellers. Toronto: Ministry of Tourism.

Escarpment (39% of respondents) and Georgian Bay (28%) and less, but still notable, for Sauble Beach (12%) and the Bruce Trail (9%). Visitation rates were low; Niagara Escarpment (17% of respondents), Georgian Bay (4.5%), Bruce Trail (2%), and Sauble Beach (1.5%). For those visiting these destinations, using a 10-point scale (1 = low; 10 = high), all rated the destinations highly for their nature and outdoor experience (7.5 to 8.5).

The national and provincial land mass is more than 28,500 ha (11,553 acres) (7 properties) and total Crown¹⁶ land equals 226 sq km or about 5.4% of Bruce County's total land mass.

Additional lands owned by the Saugeen Valley and Grey Sauble Conservation Authorities adds another 11,744 ha (4,753 acres) to this inventory, representing thirty-five properties.

As an indicator of camping as an important component of the outdoor experience, provincial parks in Bruce County account for 14.6% of all campsites in the South-west Region and 2.5% for all of Ontario. As a comparison, Grey County has 3.6% and 0.006% respectively.

Beaches, as core attractions, are numerous and number more than 100.¹⁷ Sauble Beach, Southampton, and Port Elgin beaches are major attractors, providing a significant "pull" factor. Sauble Beach is one of the longest freshwater beaches in Ontario, approximately 11 km, and a very popular beach destination. A number of smaller beaches add to the overall pull of Bruce County's beaches and include Lion's Head, Red Bay, and Point Clark.

On-theme and supporting attractions¹⁸ add to the overall "pull" appeal of core attractions. As identified through the resource audit, assessment by Premier-ranked Tourist Destination staff, and through advisory committee meetings, a significant base of on-theme and supporting attractions and services have been identified. For illustrative purposes, see Table 5. (See Appendix G for a summary of core, on-theme, and supporting attractions as determined in Phase I.)

Bruce County Tourism and other destination marketing organizations (formal and informal) collaborate and coordinate promotional activities towards increasing the "Bruce" destination brand as well as the "Grey-Bruce" brand. Grey and Bruce have long been known as and referred to as the "twin counties" and tourism operators and DMOs have built on this by developing a number of joint ventures. Through the Grey Bruce Regional Tourism Marketing Partnership, joint activities have included the "stamps"

¹⁶ Crown land is land owned by the national and provincial governments and includes unpatented lands.

¹⁷ Bruce Adventure Passport. (2006). Published by Bruce County Tourism.

¹⁸ On-theme attractions are those that offer another way of experiencing the core attraction. Supporting attractions are those that provide secondary reasons to travel to a destination and add to the critical mass of tourist services.

programme, which promote attractions using images on postage stamp-like graphic designs. Presently, these include golf, gallery and studio tour, festivals and events, rural gardens, and all-seasons trails. Starting in 2006/2007, the first-ever jointly produced tourist map was developed and distributed and received significant praise, both locally and by tourists. Finally, the “Ride Grey Bruce” campaign, promoting motorcycling and snowmobiling, has been in place for several years.

A number of private and industry initiated promotional/marketing organizations exist, including Grey Bruce Bed and Breakfast, Grey Bruce Festivals Network, Grey Bruce Your Way (on-line marketing and booking), Bruce Grey Trails Network, Bruce Trail Association, Rural Gardens of Grey and Bruce, and the Ontario Federation of Snowmobile Clubs (District 9).

Collectively, these initiatives increase the value of core and supporting attractions and services, to the benefit of the tourists and businesses.

Table 5: An Example of On-theme and Supporting Attractions for Beaches

| On-Theme | Supporting |
|---------------------------------------|------------------------------|
| Beach volleyball | Amusement park |
| Bird watching | Art School |
| Board sailing | Bars/pubs |
| Boat launch ramps | Beach themed shopping |
| Canoeing/kayaking—flat-water | Boat Rentals |
| Cottage | Bruce County Museum |
| Drive on beach (South Sauble) | Chantry Island |
| Festivals/car shows/Sauble Sand Fest | Craft shows |
| On-beach restaurants | Entertainment night/life |
| Sailing | Equestrian Trail |
| Shopping/flea markets | Fishing |
| Sunsets | Garden tours & amphitheatres |
| Sunbathing | Grey Bruce Museum |
| Travel touring corridors-automobile | High end shopping |
| Viewing natural attractions | Horse racing |
| Water sports (trampoline, watercraft) | Marina |
| | Sauble Speedway |
| | Saugeen & Cape Pow Wows |
| | Shopping (arts/crafts/photo) |

Source: Source: PRTD survey, 2006.

Bruce County’s core attractions are intimately tied to the physical setting of the destination. In 1990, the Niagara Escarpment was designated as a World Biosphere Reserve by the United Nations Educational, Scientific, and Cultural Organization and hosts such natural heritage features as centuries-old cedars, rare orchids, massasauga rattlesnakes, world famous rock “flowerpots”, dry land and water based caves, and is a significant natural sightseeing and hiking destination. The Bruce Peninsula National Park (BPNP)

was created to protect a significant part of the Niagara Escarpment and to offer controlled recreation opportunities to residents and visitors. Fathom Five National Marine Park (FFNMP) is closely aligned with the BPNP and protects a significant marine environment that includes flowerpots, islands, and numerous historical shipwrecks.

Core attractions are not well linked to the human/social history of Bruce County. Beaches are located at sites of early water associated settlements, such as Lion's Head (sheltered harbour) and Southampton (navigable river), but generally do not feature any historical or heritage attractions. Water provided the early means of transportation, especially via steamboats. One exception to the lack of heritage content at water-based attractions is Fathom Five National Marine Park, a core attraction, that protects numerous late 1800s and early 1900s shipwrecks, and is a popular dive spot. Nearby competition for marine heritage comes from Michigan and includes lighthouses and shipwrecks. Thunder Bay National Marine Sanctuary and Underwater Preserve contains about 116 "historically significant shipwrecks" in the 448 square mile sanctuary, becoming the 13th US national marine sanctuary.¹⁹ Marine heritage is an emerging attractor for Bruce County but will require further development and enhancement to realize its full potential. A "marine Heritage Trail", water-based and land-based, has potential to draw together nature-based heritage and culture and heritage, including storytelling.

Bruce County's competitors are located between two and three hours drive from Port Elgin (as a central geographic point for the county). Beach competitors are Grand Bend (160 km), Wasaga Beach (130 km), and possibly Muskoka (240 km). Competitive provincial parks are located in the Grand Bend, Goderich (130 km), and Wasaga Beach areas. FFNMP is unique and has no competition within Ontario; the only other national marine parks are saltwater and located in Canada's ocean provinces. BPNP's competition might be considered to be Georgian Bay Islands National Park, about three hours (240 km) directly east and across Georgian Bay, although each offers different national park experiences.

Bruce County, as a beach destination, is less commercially developed than other destinations including Grand Bend and Wasaga Beach. Many smaller and less popular beaches have been discovered by tourists, particularly seasonal residents. The mass tourism beaches are Sauble, Port Elgin, and Southampton. Overall, compared to other tourism destinations mentioned above, the guest experience is one of less crowding, less commercialism, and generally more family oriented, particularly for families with younger children. CTS (2004) data indicate that travellers to Bruce County spend less per capita than the provincial average (Table 7), making it quite affordable.

¹⁹ http://en.wikipedia.org/wiki/Category:Alpena_County,_Michigan. Retrieved 15 March 2008.

Table 6: Summary of Responses From the PRTD Core Survey: Mass/Niche Markets, Primary Target Groups, and Types of Travellers

| Sector | Cater to the Mass Market % | Primary Target | Types of Travellers /Travel Group (1) (mean percentage) |
|----------------------|----------------------------|--|--|
| All | 64 | Adults Families Seniors | Independent (76) Small Groups (24) Business Singles (17) |
| Accommodations | 63 | Families | Independent (82) Small Groups (24) Business Singles (19) |
| Food & Beverage | 88 | Adults Families Seniors | Independent (62) Small Groups (20) Business Singles (17) |
| Retail | 62 | Adults/Seniors Families Young Adults | Independent (72) Small Groups (19) Business Singles (15) |
| Golf | 70 | Adults/Seniors Children/Youth Families | Independent (66) Small Groups (25) Big Groups (17) |
| Marina | 20 | Seniors Families/Adults Children/Youth | Independent (99) Small Groups (1) |
| Adventure Outfitters | 75 | Young Adults Adults Families | Independent (66) Small Groups (51) Big Groups (31) |
| Tours & Excursions | 33 | Adults/Seniors Families Children/Youth | Independent (84) Small Groups (48) Big Groups (8) |
| Attractions | 50 | Adults/Seniors Children/Youth Families | Independent (79) Small Groups (18) Big Groups (15) |
| Festivals & Events | 62 | Adults/Seniors Children/Youth Families | Independent (83) Small Groups (21) Big Groups (20) |

Source: PRTD survey, 2006

(1) Mean percentage of the range for each category (e.g., range of responses for “big groups” is 2-70% but the mean of all responses is 8%)

Table 7: Comparison of Mean Travel Costs: Bruce County and Ontario

| | Bruce County | Ontario |
|--------------------|--------------|----------|
| Same-day Visitors | \$19.24 | \$62.56 |
| Overnight Visitors | \$127.14 | \$270.27 |

Source: CTS and ITS, 2004

Bruce County appeals to both mass and niche market segments. Of those responding to the PRTD survey question regarding serving a mass or niche market (n=399), 64.4% replied "mass market". Respondents' written responses indicated they served the following types of visitors: families, couples, business people, VFR, locals and day-trippers, and sports groups. Table 8 summarises the responses to the mass/niche question and lists the top three responses regarding "primary target" and "types of travellers/travel group".

Beach tourism activity must be inferred from related activities, such as swimming, boating, and the CTS category of "other water-based activities". Table 8 illustrates the strength of the mass and niche appeal activities, for overnight visitors.

Table 8: Appeal of Mass and Niche Market Activities for Overnight Visitors

| Activity | Number of Trips Reported |
|--|--------------------------|
| Mass Market Appeal | |
| Visiting Friends and Relatives (VFR) | 1,047,300 |
| Sightseeing | 576,900 |
| Walking and Hiking | 430,100 |
| Swimming | 380,000 |
| Visiting National and Provincial Parks | 284,900 |
| Niche Market Appeal | |
| Boating | 116,100 |
| Golf | 115,900 |
| Fishing | 113,000 |

Source: CTS and ITS data supplied by the Ministry of Tourism, 2004.

Table 6 indicates survey respondents' perceptions of origins of visitors for their businesses but includes only those businesses responding to the PRTD survey (59% return rate) and likely excludes many year-round businesses. With the exception of US short haul, businesses reported a range from 1% to 100% given the categories choices (regional, provincial, national, US short haul, US long haul, and international); US short haul ranged from 1% to 80%. Despite the broad range, the mean percentage within each category indicates significant variation (see Table 9).

The response to seasonality by many businesses is closure during the non-peak tourist time. For accommodations, 54% report seasonal operations and

food and beverage establishments report 12%. For all businesses, 71% are open during the May to September period, which can be identified as the tourist season in Bruce County. This response creates a challenge in attempting to develop Bruce County as a year-round destination, a Catch-22 situation with a lack of resources to serve visitors but a lack of visitors to support businesses. (See Table 10)

Table 9: Origins of Visitors

| Origin | Range % | Mean % |
|---------------|---------|--------|
| Regional | 1 - 100 | 45 |
| Provincial | 1 - 100 | 52 |
| National | 1 - 100 | 9 |
| US short haul | 1 - 80 | 10 |
| US long haul | 1 - 100 | 6 |
| International | 1 - 100 | 8 |

Source: PRTD survey, 2006

This section of the workbook closed with the statement: “A core attraction or set of complementary attractions pull visitation from all segments on a year-round basis”. The affirmation could not be made. Bruce County is a seasonal destination, with few exceptions, although there have been marketing and promotional activities in attempts to induce shoulder season and off-season (winter) activities, such as fall touring, snowmobiling, cross-country skiing, and winter camping (yurts in MacGregor Provincial Park).

Research consultations (focus groups and interviews) through Phase II confirmed the above Phase I findings. Two additional attractions were suggested for inclusion on the core attractions list, the Bruce County Museum and Cultural Centre (BCM & CC) and Warton Willie. The latter generated about 10,500 visits (representing 3,325 travel parties) to Willie’s home/enclosure in the summer of 2007. The former was viewed as too local/regional in its “pull” factor but none doubted its potential to extend its reach.

Focus group participants and interviewees generated a long list of candidates that they felt could become core, on-theme, and supporting attractions. The best candidates were: food and culinary tourism; nature-based and music festivals/events; nature-based arts and photography; First Nations powwows and culture; the BCM & CC; and expansion of marine and culture/heritage. Golf is an emerging activity and could easily become a core attractor. Golf has tourist participation rates higher than the provincial average. Of those reporting golf as an activity, for all visitations, the average for Ontario was 2% compared to Bruce County at 7% (CTS, 2004). Same-day visitation was the same for Ontario and Bruce County at 1%; overnight tourists were at 4% for Ontario and 10% for Bruce County.

The potential to become a “green/eco-friendly” destination was strongly endorsed, especially with complementary links to food and culinary tourism, the UNESCO World Biosphere Niagara Escarpment, Dark Skies, Blue Flag beaches, and niche nature-based activities. Bruce County is well positioned to undertake such an initiative due to the significantly large tracts of publicly owned land and agricultural base.

Two other activities, sightseeing and visiting national historic sites, had rates higher than the provincial average. Sightseeing was reported 20% of the time for Ontario and 33% for Bruce County (overnight was 33% and 41%, respectively). Visiting national historic sites was at 6% for Ontario and 11% for Bruce County (same-day was 3% and 10%, respectively; overnight for both was 11%).

Table 10: Summary of Responses From the PRTD Core Survey:
Geographic Origins and Seasonality

| Sector | At Least 20% of Visitors From Out of the Area (% reporting yes) | Origin of Visitors/Customers (mean %) | Business Open Year-round? (mean % reporting yes) (1) |
|----------------------|---|--|--|
| All | 80 | Provincial (52) Regional (45) US short-haul (10) | 54 |
| Accommodations | 88 | Provincial (61) Regional (33) International (9) | 57 |
| Food & Beverage | 83 | Regional (72) Provincial (31) US short-haul (10) | 77 |
| Retail | 72 | Regional (48) Provincial (43) National (11) | 54 |
| Golf | 100 | Regional (55) Provincial (30) US short haul (8) | 0 |
| Marina | 70 | Provincial (71) Regional (27) US short haul (24) | 20 |
| Adventure Outfitters | 79 | Provincial (56) Regional (30) US short haul (17) | 29 |
| Tours & Excursions | 50 | Provincial (52) Regional (36) US short haul (17) | 0 |
| Attractions | 78 | Provincial (45) Regional (43) National (9) US short (9) | 30 |
| Festivals & Events | 67 | Regional (72) Provincial (21) US short haul (8) | 14 |

Source: PRTD survey, 2006.

(1) Mean percentage of the range for each category (e.g., range of responses for "regional" is 1-100% but the mean of all responses is 45%)

4.2 Quality and Critical Mass Findings

*OVERALL RATING FOR QUALITY and CRITICAL MASS:
"Can the Quality and Critical Mass Element be affirmed? - **ALMOST**"*

Criteria and Measurement include:

How the destination provides a memorable experience by offering a broad and deep range of options:

- core and related activities
- entertainment, shopping, and dining

Although direct evidence is limited, data available indicate that Bruce County does, indeed, stand out as memorable to the visitor. This can be confirmed by reference to two recent surveys, the "Bruce Adventure Passport" promotion on-line survey and the "Mountain Bike Park" paper-based survey. In addition, many trips to Bruce County are overnight stays.

On a four-point scale (1=low, 4=high), respondents to the Passport survey provided the following ratings:

I feel the passport program encourages me to invite more people up to visit me.....2.9

I feel the passport program encourages me to visit Bruce County more often.....3.5

I will participate in this Adventure Passport program again.....3.7

Although these are indirect statements about memorable experiences, an assumption can be made that these statements are a reflection of good experiences and strong indications that return visits are likely. Most people are unlikely to return to a tourist destination if experiences were unpleasant, regardless of the offering of a contest.

Of the survey respondents to the sole question in the Mountain Bike survey, that indirectly reflects memorable experiences, 99% stated they would return to the park.

Further support to for affirm that visits to Bruce County provide memorable experiences is shown through a high visitation rate. Using the geo-spatial technique of location quotients²⁰, Bruce County ranked sixth (LQ = 2.5996; mean LQ for Ontario = 1.5731) for all census divisions in Ontario for domestic tourism (intra-provincial) from 1996 to 2001. As a percentage of all

²⁰ Location Quotients (LQ) indicate whether a destination (census division) is above (LQ = >1.0) or below (LQ = <1.0), or equal to (LQ = 1.0) the mean for a larger area. The study referred to here is by Clark, 2003). See references.

domestic trips in Ontario, Bruce County had a mean of 2.96 (n=2,049,058) compared to Grey County at 1.59 (n=1,097,555). In 2004, all trips (domestic and international) totalled 1,726,200. Domestic trips totalled 1,033,900 (2004) and of these 1,016,500 were intra-provincial (i.e., Ontario only).

There are no other published or readily available data or indirect indicators are available to support the affirmation of “memorable experiences”. This lack of direct customer satisfaction feedback data is an area of weakness in assessing Bruce County’s “tourist appeal”.

Bruce County has a high percentage of overnight stays that includes participation in the core attractions. Data from the CTS and ITS (2004) show that the average Bruce County vacation stay is 2.14 nights. Respondents to the PRTD surveys report overnight stays with two “peaks”, one at two days and from four days to one week (Figure 2). Eighty-two per cent (82%) of those accommodators responding to the PRTD survey state that their visitors stayed from two to seven nights.

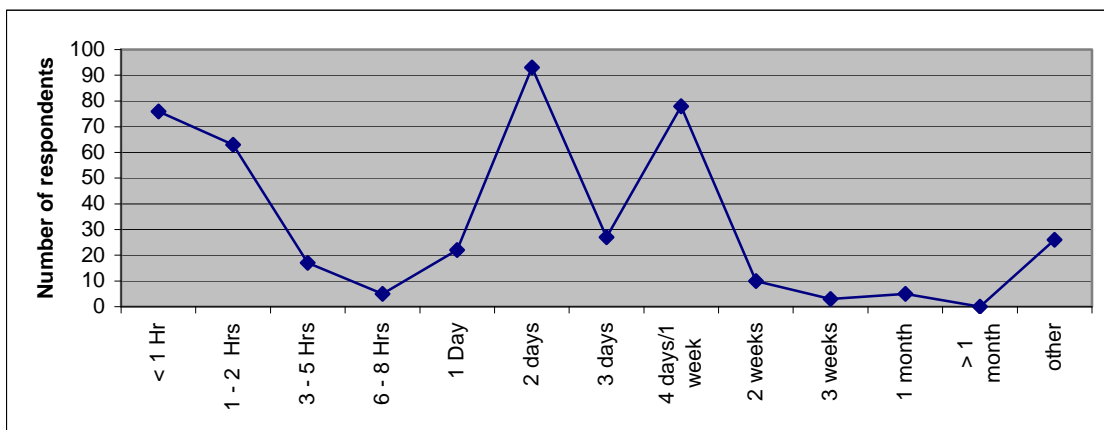


Figure 2: Length of Stay Reported by PRTD Survey Respondents
Source: PRTD survey, 2006

Specific core activities or those that can be inferred as part of the core attraction experience indicate overnight stays. These are summarised in Table 11.

There are a number of other sources to confirm visitors consume core attractions over a period greater than twenty-four hours. The Adventure Bruce Passport participant survey indicates that 41% did not live in Bruce County and 22% own cottages. Of these, 75% spent more than one week completing the Passport contest. Camping, as an element of the core attraction visiting national and provincial parks, has a six-year mean participation rate (18.04%) more than twice the provincial mean (9.41%) and almost twice that of its immediate neighbour, Grey County (10.02%).²¹

²¹ Clark, (2003). Type of accommodation used. CTS, 1996-2001. Page 146.

Table 11: Core Attractions Consumed During a Period Greater than Twenty-four Hours

| Attraction | Percentage Reporting Overnight Stays |
|-------------------------------------|--------------------------------------|
| Visit national and provincial parks | 89 |
| Walking and Hiking | 79 |
| Sightseeing | 79 |
| Swimming | 73 |

Source: CTS and ITS (2004).

CTS data offers further support for a strong overnight tourist base. From 1996 to 2001, the mean percentage of overnight person-trips was 66.45 compared with the province (37.61%) and Grey County (50.67%).

A variety of on-theme activities give additional reasons for visitors to stay more than twenty-four hours.²² These include snowmobiling (100%), cross-country skiing (100%), visiting theme parks (99%), attending fairs and festivals (94%), cycling (91%), attending cultural performances (90%), nightlife (89%), shopping (84%), and visiting museums and galleries (79%).

As previously noted, seasonality is an issue for Bruce County tourism operators. Core attractions, together with on-theme and supporting attractions do not support Bruce County as a year-round attraction. Several core attractions do maintain year-round operations but the demand is very limited and without a strong enough “pull factor” to affirm Bruce County as a “year-round destination”.

Bruce Peninsula National Park and MacGregor Provincial Park are open year-round and include opportunities for winter camping. In addition to the choice of regular campsites, MacGregor offers about twelve sites with “yurts”, which are:

“...semi-permanent canvas-covered structures are 16 feet in diameter, mounted on a wooden deck about two feet off the ground. Yurts can accommodate up to six people. They have two sets of bunk beds, a table and chairs, plywood floors, electric heat and lighting, and a propane barbecue.”²³

MacGregor provides heated comfort stations to serve winter campers. Bruce Peninsula National Park offers winter camping with limited services. The Niagara Escarpment and associated trails have limited access during winter

²² The Southern Bruce County Advisory Committee felt that the response for this element should be “ALMOST”; the Northern Advisory Committee and PRTD staff team felt the response should be “YES”.

²³ Retrieved from <http://www.ontarioparks.com/ENGLISH/macgregoryurts.html>

months. With the exception of Sauble Beach, beach communities can be year-round destinations but lack the “pull Factor” of the “sand and sun”. Sauble Beach, as a prime beach destination, has enough services to support the local population but the on-theme activities associated with the “beach experience” are non-existent.

Many on-theme activities are in operation year-round but these are not sufficient to draw tourists year-round and not to an extent that this element could be affirmed.²⁴ Most of the on-theme and supporting attractions are seasonal, positioned to tap the late spring to early fall tourism market, and many operate during the prime July-August tourism season.

Ease of accessibility, including ease-of-purchase, as defined by the PRTD Framework criteria, is important to be considered a premier-ranked destination. This element was affirmed as “almost”. Core attractions such as the Niagara Escarpment, beaches, and the Bruce Trail are not “purchased” as such but on-theme (e.g., privately owned caves, equipment for water sports) and supporting attractions (e.g., accommodations, festivals and events, entrance fees to gardens) are required to be purchased.

Several core attractions (i.e., national and provincial parks) are easy to purchase via a number of methods including 1-800 telephone numbers, on-line reservations, and on-site/at the park. Others have more limited “purchase points”. Table 12 highlights the responses by businesses to the PRTD survey question regarding where products and experiences can be purchased.

With few exceptions (accommodations, marinas) the most frequently reported purchase option is on-site with the Internet as the most second most frequent response. These responses do not necessarily reflect actual consumer behaviour (demand), but rather how businesses choose to provide access to their products and services (supply). Of those responding, 43% offer purchase available via the Internet and 17% report 1-800 telephone numbers.

Several sectors make intuitive sense regarding on-site purchase, such as food and beverages and retails but others, such as attractions, festivals and events, and adventure/outfitters, could make Internet purchases an option. But, despite the apparent frequency of the Internet as a purchase option, anecdotal evidence (through a random review of business Websites) would suggest that many sites simply offer contact information (e.g., 1-800, e-mail contact) and not true Web-based purchase choices. Or in other words, E-commerce has not been functionally integrated as a purchase option.

²⁴ The Southern Bruce County Advisory Committee felt that the response for this element should be “NO”; the Northern Advisory Committee and PRTD staff team felt the response should be “ALMOST”.

Table 12: Options for the Purchase of Products and Experiences

| Sector | Purchase Options Rank Order |
|-----------------------------|---|
| All Businesses | On-site Internet 1-800 3 rd Party |
| Accommodation | Internet On-site 3 rd Party 1-800 |
| Food and Beverage Retail | On-site On-site Internet |
| Golf | On-site Internet |
| Marinas | Internet On-site 3 rd Party |
| Adventure/Outfitters | On-site Internet |
| Tours and Excursions | On-site 1-800 Internet |
| Attractions | On-site Internet 3 rd Party |
| Festivals and Events | On-site Internet |

Source: PRTD survey, 2006

Finally, third-party purchase options²⁵, both locally and out-of-the-area, are very few, with only about 10% reporting this as a purchase option. A regional e-commerce initiative (Grey Bruce Your Way/GBYW) states that: "This [Web]site will serve as an online resource to plan, book and put together an Itinerary for a perfect vacation in the Grey and Bruce Counties for any season."²⁶ There have been a number of delays in "going live" with the system which means 2008 is the first year likely to benefit fully from this initiative.²⁷ With a high rate of involvement, GBYW could be a significant benefit to tourism and change the present situation.

²⁵ Third-party purchase options are those through such services as DMOs, commission-based businesses (e.g., accommodations bookings), travel agents, and receptives.

²⁶ Retrieved from <http://www.greybruceyourway.com/>. 9 July 2007.

²⁷ As of 9th July 2007, the Website was not live but does state that GBYW will be active in the Spring 2007.

Core and on-theme attractions, activities, and services are available at a number of price points, making visitation to Bruce County appealing to a variety of markets/tourists. Activity costs range from free and upwards. Table 13 illustrates the range of price points for core and on-theme activities.

Table 13: Range of Price Points for a Variety of Core and On-theme Attractions and Activities

| Core Activity | On-theme Activities | Price Range \$ |
|---|---------------------------------------|--|
| Beach use | Sunbathing, swimming | Free - \$5 per person (Saugeen First Nations drive-on/south beach) |
| Beach use | Water sports/trampoline | 12 – 18 per person per ½ hour |
| National and Provincial Parks | Camping | 10 – 35 per night |
| National and Provincial Parks | Day use; picnics; hiking; swimming | 6 – 10 per day |
| Niagara Escarpment | Caves | Free – 6 per person |
| Niagara Escarpment | Hiking | Free |
| Niagara Escarpment | Sightseeing | Free |
| Fathom Five National Marine Park | Boat cruises/tours | 15 – 30 per person |
| Fathom Five National Marine Park | Diving | 5 - Daily permit 75 equipment rentals (retail/dive shop) |
| Fathom Five National Marine Park | Canoeing/Kayaking | 30 – 35 per day |
| Fathom Five National Marine Park – Niagara Escarpment | Lighthouse touring/visitation | Free – 25 per person |

Source: PRTD survey, 2006

The above sampling (Table 13) illustrates the range of options and price-points available to visitors to experience both core and on-theme attractions. As shown above the per day per visitor mean expense for Bruce County is about 31% lower than the Ontario mean (\$19.24 and 62.56 respectively) and indicates Bruce County is an affordable tourism destination.

In considering how the range of attractions and activities fit with tourists' desires to travel, attractions and activities can be grouped by motivation²⁸. Table 14 illustrates typical motivations and associated activities with price ranges as identified through the PRTD surveys. The table (Table 14) provides

²⁸ For examples of different models of defining and describing motivation to travel, see, for example, McIntosh and Goeldner; Pearce; and MacCannell.

examples and is not a complete inventory of activities and attractions. It does nicely illustrate how Bruce County is able to provide a menu of options for a wide variety of travel interests/motivations.

Table 14: Examples of Attractions and Activities, Associated Travel Motivations, and Price Ranges

| Motivation | Attraction and Activity | Price Range Per person \$ |
|-------------------------------|--|---------------------------|
| Relaxation | Spas, Camping, Lodges | 20 – 100 |
| Entertainment | Golf, Pubs/Bars, Sauble Speedway, Amusement Parks | 20 – 50+ |
| Education | Guided tours/hikes, Rural Gardens, Visitor Centres, Museums, Heritage Touring, Birding | Free – 25 |
| Cultural/History Education | Festivals and Events, Aboriginal Powwows, Museums, Lighthouse Touring | Free – 25 |
| Skills Development | Art School, Photography Classes, Golf | Free – 150 |
| Adventure | SCUBA Diving, Sailing, Canoeing/Kayaking, Hiking | Free - 200 |

Source: PRTD survey, 2006

Methods of communicating information about Bruce County's tourism resources varied somewhat across the service sectors but heavy reliance on flyers and brochures, as well as print advertisements, was evident. Most promotion was through local distribution of the materials as opposed to distribution outside of the area. Two local studies suggest that there might be a gap between what travellers use as planning tools and what businesses use as marketing/promotional tools.²⁹ These studies might be identifying the need to better understand reliance of different markets on different planning resources. Table 15 compares these two studies and Table 16 compares promotional mediums used by the various tourism sectors as identified through the PRTD survey.

²⁹ See Smith, 2004 and 2005

Table 15: Sources of Information Used for Trip Planning

| Resources Used by Local Residents Planning Activities for Guests (VFR) (1) (%) | Local Residents Planning Activities for Guests (VFR) (2) (Rank Order) | Visitors to the Bruce County Tourism Website (3) (%) |
|--|---|--|
| Info centres/Chambers (40.1) | Own experience (83.4) | Internet (24.7) |
| Bruce Tourism Website (24.9) | Info centre/Chamber (39.0) | Family/Friends (19.0) |
| Tourism staff at events (13.8) | Guide books (36.0) | Tourism guides (15.6) |
| Telephone Bruce Tourism (8.7) | Internet (33.9) | Past visitor/Resident (13.6) |
| | Newspaper (31.8) | Info centres/Chambers (7.6) |
| | Family/Friends (25.5) | |
| | Radio (22.8) | |
| | Magazine articles (15.3) | |
| | Groups (10.5) | |
| | Co-workers (7.2) | |

Source: Smith, 2005

Notes: (1) The specific question was: "In planning your visitor's trip did you [use information centre or chamber of commerce, visit Bruce County's Website, visit Bruce County staff at local events, phone Bruce County tourism]?" (2) The specific question was: "What travel information sources did you use in planning your guest's trip to Bruce County?" (3) The question asked: "[What is the] most important piece of travel information when planning trips?"

Table 16: Marketing and Promotional Tools Used by Tourism Operators

| Sector | Marketing/Promotional Tools (Rank order; Top four) |
|----------------------|---|
| All | Flyers/Brochures Internet Print ads Radio |
| Accommodation | Flyers/Brochures Internet Print ads Consumer shows |
| Food and Beverage | Print ads Flyers/Brochures Internet Radio |
| Retail | Flyers/Brochures Print ads Internet Direct mail |
| Golf | Flyers/Brochures Internet Print ads Radio |
| Marinas | Flyers/Brochures Internet Print ads |
| Adventure/Outfitters | Flyers/Brochures Internet Radio Television |
| Tours/Excursions | Internet Flyers/Brochures Trade shows Consumer shows |
| Attractions | Flyers/Brochures Internet Direct mail Print ads |
| Festivals and Events | Flyers/Brochures Internet Radio Print ads |

Source: PRTD survey, 2006

Bruce County Tourism is an important source of traveller information. Requests for information packages (telephone and Internet) had increased from 2005 to 2006 by 43% and 2006 was 7.7% higher than the six-year average see Figure 3). Telephone calls to Bruce Tourism averaged about 200 per week for an annual total of about 10,000. On-site visitation in 2006 to the “Summer Cruiser” vehicle recorded 6,620 people with several events having high demand, making it difficult to count. One event was “swamped” with visitors. Requests specifically for information about the self-guided lighthouse tour was 806 in 2006 (Ontario and Michigan accounted for 93% of all requests). Detailed Website statistics were not available but a brief analysis of the “hits” graph shows a peak of 9,100 in July (2006). The general trend of “hits” was one increasing towards July and August with small “spikes” in March, June, September, October, and December.

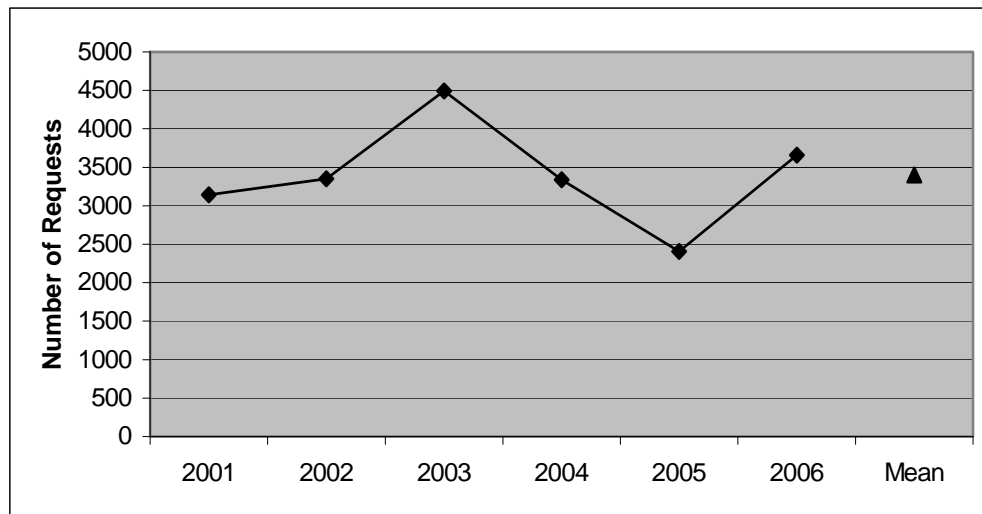


Figure 3: Requests for Information Packages
 Note: ▲ is the 6-year mean. Source: Bruce County Tourism, 2006

Purchase points for core, on-theme, and supporting attractions and activities are not necessarily easy to buy. As stated earlier, a variety of promotional strategies are used by tourism operators that includes much reliance on printed materials distributed mainly throughout Bruce County. Internet/Websites, for the most part, are not true e-commerce functioning sites, usually providing telephone numbers and e-mail addresses as the contact method. Bruce County Tourism produces an annual tourism magazine that includes a significant amount of information about tourism resources and its Adventure Bruce Passport contest, along with telephone contacts and geographic location. Its Website includes expands this information with links to operator’s Websites. Provincial and national parks are e-commerce enabled, making purchase easy.

Cultural experiences and entertainment options are few, scattered throughout Bruce County, many presented during the summer tourist season as “festivals”. And, although others might exist, information about them is difficult to locate. Year-round, a number of venues offer cultural and entertainment experiences; these include Voyageur Storytelling, Victoria Jubilee Hall Arts and Music group, and a number of Christmas-specific presentations.

A number of festivals and events draw tourists to the area while many have only local or regional appeal. There is an audience for the “big name” performers, often playing to sold-out venues. Musicians cover the range from Big Band to country to folk, performing at venues such as Victoria Jubilee Hall, Canadian Big Band Celebration, Kincardine Scottish Music Festival, and Best Western Bruce Inn (Kincardine): Peter Appleyard, Toronto All-Star Big Band, Slainte Mhath, Cowboy Junkies, Gino Vinelli, Peter Frampton, Good Brothers, Burton Cummings, The Temptations, Amy Sky, David Wilcox, Dark Angel Blues Band, Bill Durst, Bill Durst, Glengarry Bhoys, and Alanah Myles.

Dining options are plentiful in the low to mid-price range but high-end, fine dining is very limited within Bruce County. If one “extends” the boundaries for fine dining to include near-by Owen Sound, the list is a little longer. Table 17 summarises food and beverage offerings of the area, and includes near-border communities such as Hanover and Owen Sound. As a snapshot in time, this inventory should be considered as an approximation of what is a changing foodscape.

Table 17: Food and Beverage Establishments – Type of Dining Experience

| Type of Dining | Number of Establishments | Entrée Price Range \$ |
|----------------|--------------------------|-----------------------|
| Fast Food | 100+ | 4 – 10 |
| Mid-price | 180 | 12 – 20 |
| High-end | 22 | 12 – 70 |
| Brew Pubs | 0 | -- |
| Wine Bars | 0 | -- |
| Entertainment | 7 | -- |
| Nightlife | 1 | -- |

Source: PRTD survey, 2006

Few establishments reported a “national branding” affiliation (n=3). Most of the fast food and many of the mid-priced places are national brands, including those serving burgers, pizzas, and coffee/donuts. Most of the mid-priced and all of the high-end restaurants are not nationally branded.

As an indicator of high-end dining, only one restaurant met the PRTD criteria of thirty-five wine labels although one reported thirty-three. Two in Owen Sound reported fifteen and twenty labels. Similarly, three restaurants

reported having accredited chefs (two Red Seal and one Executive Sous Chef). Five responded that their chefs or restaurants have recognition outside of the region.

A range of shopping experiences is available, but is limited. The communities throughout Bruce County support the common branded low and medium priced retail stores (e.g., The Dollar Store, Zellers, Giant Tiger, Saans Department Store, Canadian Tire, and Walmart). These stores are part of the critical mass necessary to support tourism but are not the high-end, specialty shops needed to support a premier-ranked destination, to enhance the “pull factor”. The resource inventory identified a number of specialty shopping experiences that include high-end (10), antiques (33), arts and crafts (54), and artisan/artist galleries (52). Of these, 33.8% state they carry locally produced goods. A number of businesses (37.8%) stated that their product line or shopping experience is aimed at a niche market.

Phase II consultation participants did not add significantly to the findings of Phase I. Participants affirmed that seasonality was a serious barrier to tourism development but expressed a strong desire to push the boundaries, to expand the prime tourism season from May to October, initially, or to develop strong shoulder season offerings. Input confirmed the lack of a critical mass of year-round businesses to support an expanded season, let alone a year-round destination.

There was mixed feedback regarding the need for higher end, branded hotel/motel accommodations. Some felt that such developments would have a negative impact on the rural and small-town appeal of the area whereas other felt that this type of development was needed to attract international (including American) visitors. A need for high-end dining was deemed to be important to support international visitors and food and culinary tourism. Phase II consultation confirmed the desire (or need) to expand product development and marketing beyond nature-based tourism to include culture, heritage, education, arts, and similar niche tourists.

4.3 Satisfaction and Value Findings

*OVERALL RATING FOR SATISFACTION and VALUE:
"Can the Satisfaction and Value Element be affirmed? - **ALMOST**"*

Criteria and Measurement include:

The destination offers its guests:

- a welcome
- satisfied expectations
- value for money

A paucity of hard information or evidence limits the ability to state that Bruce County is considered "friendly" and "very hospitable". Anecdotal evidence does suggest that this is, indeed, the case.

Surveys conducted by Bruce County Tourism (Adventure Bruce Passport and Mountain Bike Park) and the provincial parks all indicate very satisfied visitors. The first two surveys do not ask directly about inter-personal experience (tourist – visitor), positive experiences can be reflected in responses to questions about activity and facility satisfaction. Of the eight, 4-point Likert scale statements about the Adventure Bruce Passport promotion, all visitor (non-residents) responses generated ratings of 2.87 and higher (ranged from 2.87 to 3.74). Similarly, cottage owners expressed high levels of satisfaction ranging from 2.94 to 3.90. The lower rating was in regards to prizes being the motivator to complete the contest.

The Mountain Bike Park survey generated similar satisfaction levels on a 5-point Likert scale about the facilities, ranging from 3.2 to 4.0. The low score was in regards to highway directional signage. A 2000 local provincial park survey rated staff at 4.39 on a 5-point Likert scale compared with 4.20 for the Southwest Zone and 4.22 for the provincial mean. The survey also stated: " ...no campers suggested that staff members at [the park] needed to improve their customer service skills" (emphasis in the original).³⁰

An Internet based study in 2004³¹ asked about customer service using a "strongly agree – strongly disagree" type question. The four questions all received high ratings (see Table 18). One question asked survey respondents the reasons for not visiting and about 1%³² stated "bad previous experience".

³⁰ Private communication of an unpublished report. (2000).

³¹ See Smith. (2004).

³² Estimated from a graph. See Smith. (2005).

Table 18: Customer Satisfaction Levels

| Statement | Strongly Agree % reporting | Agree % reporting |
|--|-------------------------------|----------------------|
| The customer service levels in general were excellent | 31.9 | 62.4 |
| The customer service levels in the restaurants were excellent | 26.7 | 57.7 |
| The customer service levels in the accommodations were excellent | 32.2 | 36.6 |
| The customer service levels from Bruce County Tourism were excellent | 35.1 | 29.6 |

Source: Smith, 2004

Beyond these surveys, no other regular surveys are conducted that address customer satisfaction. The Southern Advisory Committee stated the desire for a countywide customer satisfaction survey system. PRTD surveys show that very few businesses (26%) stating that they have a customer satisfaction programme. These ranged from 7% (adventure and outfitters) to 67% (marinas) although most fell between 15% and 26%.

Indirect evidence must be use to determine whether or not Bruce county is considered by visitors to be a “good value” or “expensive but worth every cent”, a statement posed in the PRTD Workbook.³³

In comparing mean spending between Bruce County and Ontario, we can state that Bruce is not an expensive destination. Same-day visitors to Bruce County spent \$19 per day compared to Ontario at \$63 while overnight visitors spent \$127 and \$270, respectively.³⁴ An Internet Web-based study in 2004, 49.8% of the visitors cited “good value for the money” as being an important rationale (including 2nd, 3rd, and 4th rankings) for choosing Bruce County as a destination.³⁵ In the same study, cost and time were cited as the top two reasons and distance as the fourth reason for not visiting Bruce County.³⁶ Although “cost” is seen as having financial implications, “time” and “distance” also reflect financial costs. Both factors reflect additional costs for travel, such as food, accommodations, and gas or automobile expenses. Table 19 summarises the non-visitation rationales from the study.

³³ The Northern Bruce County Advisory Committee felt that the response for this element should be “NO”; the Southern Advisory Committee and PRTD staff team felt the response should be “ALMOST”. A paucity of survey data was cite as the reason for the “almost” rating.

³⁴ CTS and ITS survey. (2004). Information provide to the PRTD Project team by an independent researcher.

³⁵ See Smith. (2004). Page 11.

³⁶ Ibid. Page 15.

Table 19: Rationale for Not Visiting Bruce County

| Rationale | Percentage Reporting (estimated from graph) |
|------------------------|--|
| Time | 55 |
| Cost | 32 |
| Family Concerns | 28 |
| Distance | 25 |
| Partner not interested | 7 |
| Health | 3 |

Source: Smith, 2004

Other indicators that Bruce County, as a destination, is “worth the drive” are reflected in travel distance and nights of stay. In both cases, Bruce County is higher than the provincial means; mean number of nights was 2.14 (Bruce) and 1.09 (Ontario) and distance travelled was 210km (Bruce) and 192km (Ontario).³⁷

Generally, visitation is trending upwards and has grown by 22% from 1.41 to 1.73 million person visits (1998 to 2004).³⁸ There is no independent or countywide monitoring system in place to track key experiences and services prices, as identified in the PRTD Workbook as an indicator of satisfaction and value. Those reporting an “upward trend” are accommodations, bed and breakfasts, and motels. Food and beverages, attractions, retail, and golf indicate the price trend is “flat”.

Input from Phase II participant consultations provided little in the way of affirmation or contradiction of existing themes from Phase I input. Phase II consultations recognised that “successful” tourism includes positive visitor feedback, high return rates, word-of-mouth marketing/visitors telling visitors, and higher visitation numbers, but only 65.3% felt that a county-wide tourist satisfaction survey was “important” or “very important”.³⁹ There was general agreement that Bruce County provides good value for the money.

³⁷ See Clark. 2004.

³⁸ See Ministry of Tourism. 2006a.

³⁹ See Appendix D, On-line survey summary.

4.4 Accessibility Findings

*OVERALL RATING FOR ACCESSIBILITY:
"Can the Accessibility Element be affirmed? - **YES**"*

Criteria and Measurement include:

- ease of getting to the destination
- transportation modes that serve the destination
- waterfront communities "friendliness" towards boat tourists
- recognition of the importance of transportation to the tourist experience

Bruce County, as a destination, is relatively easy to get to, by road, water, and air. Several large markets are within a two to three hour drive, providing access to 444,000 people in the Kitchener/Waterloo/Cambridge area and 3.9 million people in the GTA. By air, several airports and airfields are well positioned from Kincardine to Tobermory, with the Keppel-Wiarton Airport capable of handling 737 aircrafts with runways of 5,000 and 3100 feet. Travel by automobile from any of these airports to any Bruce County community is less than one-hour and Owen Sound is about 1 to 1½ hours distance.

Commonly used road routes, to points in Bruce County, are Highways 6, 10, and 21 and includes the extension of Highway 6 with the Chi-Cheemaun ferry. Table 20 summarises typical transportation routes, approximate travel times, and major urban markets.

Table 20: Transportation Routes and Selected Urban Markets

| Highway | Urban Market | Population (million) | Travel Time (hours) |
|----------|----------------------------|----------------------|---------------------|
| 4 and 21 | London and Sarnia | 0.55 | 3 – 3.5 |
| 6 | Waterloo Region and Guelph | 0.61 | 2 – 2.5 |
| 10 | Brampton and GTA | 5.55 | 2 – 3 |
| 26 | Barrie | 0.18 | 2 |

Source: Statistics Canada and PRTD research.

Alternative transportation modes, particularly public, are, for the most part, not available. The only regional terminal for scheduled bus service is Owen Sound and there are no connecting links to Bruce County. A courier van provides transportation into and out of Owen Sound to Pearson International Airport with scheduled stops in Kincardine and Saugeen Shores. As mentioned, air service, depending on needs, is good but there are no scheduled flights in and out of Bruce County. With more than 500 seasonal

and 185 transient slips, the fifteen marinas identified along the Huron and Georgian shorelines provide easy access to Bruce County shoreline communities for private and rental boats.

Seasonal car ferry service is available from May to October, linking the Trans-Canada Highway travel corridor with the Highway 6 corridor, running south and north through Bruce County. A study from 2004 indicates that much of the ferry transportation is “drive-through”, with destinations outside of Bruce County (see Table 21).⁴⁰

Table 21: Chi-Cheemaun Ferry Traffic Destinations and Origins

| Destination | Destination of all passengers % | Origin or Principal Residence of all passengers % |
|--------------------------------------|---------------------------------|---|
| Manitoulin and Sudbury areas | 41.0 | 11.2 |
| Bruce Peninsula and Owen Sound areas | 9.7 | 12.9 |
| SW Ontario | 17.9 | 29.4 |

Source: Owen Sound Transportation Company. 2004

Media reports, editorials, and municipal governments have, over many years, stated a desire for “improved” roads to move tourists in and out of the area more quickly. These views have been directed towards all highways in the area with particular focus on Highways 6 and 10. Changes have been made to 6/10 with more passing lanes and an Owen Sound by-passes that handles much of the traffic headed for the Bruce Peninsula and Sauble Beach, but the call for four lanes has not been heeded, yet.

Through the PRTD Transportation Resources Checklist (TRC) exercise, a number of areas of weaknesses have been identified. As well, some elements of the TRC do not apply to the Bruce County environment at this time. Traffic congestion is not a continuing problem although there are isolated situations at prime destinations within Bruce County such as long weekends during the prime tourism season and includes May 24th, Canada Day, Civic Holiday, and Labour Day. These prime destinations include Tobermory, Sauble Beach, and Saugeen Shores (Port Elgin/Southampton). During these peak times, traffic congestion is evident at Wiarton, Hepworth, and Highway 21 between Saugeen Shores and Sauble Beach.

As noted previously, inter-community public transportation is not available, with the exception of taxis, so tourists must rely on private automobiles, the main means of tourist travel in the region. Clear highway signage has been

⁴⁰ Owen Sound Transportation Company internal report. (2004). Private communication with Ian Dean.

cited as an area of weakness and presently Bruce County is undertaking a signage strategy, developed from a tourism perspective.⁴¹ Tied in with signage is the provision of at least one easily accessible visitor information centre. The PRTD Workbook exercise identified this as an area of weakness and was recently raised publicly in the media.⁴² Some area Chambers of Commerce believe that it is the mandate of the Bruce County Tourism department to undertake the distribution of tourism information (e.g., brochures, maps) and staff information centres. The Chambers sight their lack of financial and human resources to manage the task.

The accessibility element was confirmed as having been met (in Phase I), therefore the likely reason for the very limited input from Phase II consultations regarding transportation. Development of highways with more passing lanes, bicycling routes, and public transportation were identified as desirable improvements. Marinas were seen as needing improvement to support more recreational touring by boat.

⁴¹ At the time of this report, the County signage strategy was at the "draft" stage, subject to funding support from the Province of Ontario. In the Mountain Bike Survey (2007), clear signage to the facility was rated at 3.2 (on a 5-point Likert scale, the lowest rating of 5 statements).

⁴² Sun Times newspaper. April 7, 2007.

4.5 Accommodations Base Findings

*OVERALL RATING FOR ACCOMMODATIONS BASE:
"Can the Accommodations Base Element be affirmed? - **YES**"*

Criteria and Measurement include:

- a range of accommodation classes available
- a range of locations available
- the presence of higher end operators

Bruce County offers a wide range of accommodation types and price points but lacks "branded" hotels and motels within its borders, the Best Western in Kincardine and the Super 8 in Port Elgin are the sole such properties. Most of the accommodations are located along the Lake Huron and Georgian Bay shorelines and often within shoreline communities. Inland facilities are more limited, reflecting the shoreline tourism appeal.

The area does benefit from two "branded", well-known and respected campgrounds, namely two National and three Provincial parks. Three provincial parks contain 14.6% of all provincial park campsites in the SW Region and 2.5% of sites in Ontario. As a comparison, Grey County has 3.6% and 0.006% respectively. RVs, a growing niche market, do not have dedicated RV parks in Bruce County although six camps advertise RV sites of which 22% are available for transients. A summary of the accommodations base is shown in Table 22.

As stated, most of the accommodation base is located along the shorelines with the exception that bed and breakfasts and a few campgrounds are dispersed throughout the county, especially in rural areas.⁴³ A range of accommodations options exist in most communities, with a concentration at key tourism destinations and price points that reflect supply and demand. Of those facilities responding to the PRTD survey question regarding seasonal and year-round operations, 42.7% reported operating seasonally (see Table 24). Table 23 provides examples of the range of choices at three Bruce County destinations and nearby Owen Sound.

⁴³ A GIS technique called Thiessen (aka Voronoi) polygons can be used to create very effective visual maps, highlighting spatial distributions. Several such maps were created for Phase I of the PRTD framework study, as examples. Although the intent was to create a full set of polygon maps (food and beverages, accommodations, boat ramps, craft shops, etc.) access to GIS resources was limited. Once created, though, an annual update is fairly easy to maintain and track changes.

Table 22: Accommodations Base

| Property Type | Number of Properties | Number of Rooms or Sites | Price Points \$ (per night) |
|---|----------------------|--------------------------|-----------------------------|
| Bed & Breakfast | 93 | 624 | 20-115 |
| Cabin/Cottage Court/Rental cottages (2) | 107 | 571 | |
| Campground | 69 | 9,827 | 10-40 |
| Eco-Lodge | 1 | 6 | 300+ |
| Hotel | 4 | 258 | 50-200 |
| Lodge/Resort | 13 | | 82-100 |
| Motel | 40 | 1,064 | 50-200 |
| RV Park (1) | 32 | 3,537 | 13-40 |

Source: PRTD survey and Adventure Bruce Passport, 2006.

Note: (1) Properties with RV spaces; there are no dedicated RV parks. (2) Includes privately owned cottages available for rent through rental management companies.

Table 23: Accommodations Choices, Tourist Community, and Price Points for High and Off Seasons

| Community | Accommodation | Rates \$ per night | |
|----------------|----------------------------|--------------------|-------------|
| | | Off Season | High Season |
| Tobermory | Motel/Inn | 60 | 100 |
| | High-end Resort | 300 | 700 |
| | Bed and Breakfasts | 60 | 100 |
| | Campgrounds | 24 | 29 |
| Sauble Beach | Cottages | | 575-1100/wk |
| | Cottages | 87 | 145 |
| | Motel | 75-135 | 125-145 |
| | Campgrounds | 25-32 | 34-40 |
| Saugeen Shores | Resort/Motel | 90 | 105 |
| | Bed and Breakfasts | 85 | 120 |
| | Chain/Franchise Motel | 95 | 125 |
| | Cottage Courts | 300/wk | 615/wk |
| | Campgrounds/RV Parks | | 35 |
| Owen Sound | Best Western | 135-190 | 130-240 |
| | High-end Bed and Breakfast | 99 | 135 |
| | Motel | 64 | 89-129 |
| | KOA Cabins | | 50-58 |
| | KOA Campgrounds | | 22-36 |

Source: Publicly available published print-based and Web-based sources.

Accommodations operate both seasonally and year-round and there is variation amongst the property types. To illustrate, Table 24 compares bed and breakfasts, motels and hotels, and cottages and cabins as to seasonality.⁴⁴

Table 24: Seasonality and Year-round Operation Based on Property Type

| Property Type (n=171) | Year-round % Reporting | Seasonal % Reporting |
|--------------------------|---------------------------|-------------------------|
| Bed and Breakfasts | 75.0 | 25.0 |
| Motels and Hotels | 79.6 | 20.4 |
| Cabins and Cottages | 34.8 | 65.2 |

Source: PRTD surveys.

Again, as with accessibility/transportation, this element was affirmed as being met, which was the most likely reason for limited Phase II input regarding accommodations; it does not stand out in any recognizable way, good or bad. What was stated strongly, though, was the overall deteriorating condition of the stock of accommodations, some of which are “below standards”. The lack of branded, high-end hotels and motels was noted as a weakness, limiting the pull of international tourism. A lack of accommodation availability during the peak summer season was seen as limiting growth.

⁴⁴ Table based on PRTD survey responses only.

5. The Performance Dimension

The Performance Dimension includes three elements:

- F. Visitation
- G. Occupancy and Yield; and,
- H. Critical Acclaim;

The performance dimension indicates the extent to which Bruce County is “successful and recognized in the market place” in absolute and relative terms.⁴⁵

The following section not only summarizes the workbook, but incorporates findings and data from other sources, pertinent to Bruce County’s performance.

⁴⁵ PRTD workbook. Page 35.

5.1 Visitation Findings

OVERALL RATING FOR VISITATION:
*"Can the Visitation Element be affirmed? - **NO**"*

Criteria and Measurement include:

The Destination's market performance:

- visitation numbers and market share
- attractiveness to different market segments
- attractiveness over the four seasons

In absolute terms, Bruce County has strong visitation numbers representing a significant share of Ontario's market.⁴⁶ Unfortunately, this visitation is highly skewed towards an "Ontario domestic" market and does not have the diversity required by the PRTD Workbook criteria.

Canadian and international travellers (CTS and ITS, 2004) accounted for 1.73 million visitations of which 1.13 million were overnight and 0.60 million were same-day. Of the 70.89 million VFR/Pleasure trips taken by Ontarians, Bruce County hosted 1.0% of those and 3.0% of the overnight visits. Bruce County's market share is not dominated by same-day visitation but attracts 65.3% of its visitation as overnight. Table 25 shows the breakdown of overnight and same-day trip from all origins.

Table 25: Bruce County's Same-day and Overnight Trips From all Origins

| Origin | Same-day 34.7% | | Overnight 65.3% | |
|-------------------------|-------------------|------|--------------------|------|
| | Number | % | Number | % |
| Ontario | 582,800 | 97.0 | 1,016,500 | 90.0 |
| Other Provinces | 0 | 0 | 17,400 | 2.0 |
| USA | 13,100 | 2.0 | 77,000 | 7.0 |
| International (not USA) | 3,500 | 1.0 | 15,800 | 1.0 |

Source: CTS and ITS data; PRTD Workbook

Bruce County attracts a significant number of visitors, as has been stated, but its share of Ontario's 5.85 million visitors was less than 1.0% (effectively 0%); its share of Ontario's 21.39 million trips from the United States was less than 1.0% (effectively 0%); and 1.0% of Ontario's 2.05 million other international visitors.

As a share of the convention and business meeting trade, Bruce County attracted about 26,000 visitors but, again, not in significant numbers to be deemed premier-ranked as this represents about 1.0% of all meetings and convention motivated travel.

⁴⁶ Unless otherwise stated, all figures are from the 2004 CTS and ITS.

As examples of the “pull appeal” of Bruce County’s activities, the County attracted 3.0% (n=457,200) of Ontario’s sightseers; 5.0% (n=252,600) of Ontario’s national and provincial park visitors; and 3.0% (n=534,300) of Ontario’s shoppers. These overnight trips compare favourably with other areas and other activities as shown in Table 26.

Table 26: A Comparison of Activities for Bruce County and Selected Destinations as a Share of Ontario’s Overnight Travel

| Activity | Bruce County % | Grey County % | Algoma Region % | Huron County % | Northumberland County % |
|-------------------------------------|----------------|---------------|-----------------|----------------|-------------------------|
| Sightseeing | 3.0 | 3.0 | 3.0 | 1.0 | 1.0 |
| Visit National and Provincial Parks | 5.0 | 2.0 | 5.0 | 1.0 | 1.0 |
| Shopping | 3.0 | 2.0 | 2.0 | 1.0 | 1.0 |
| Golfing | 7.0 | 3.0 | 1.0 | 1.0 | 2.0 |
| Visit Festivals and Fairs | 3.0 | 1.0 | 2.0 | 2.0 | 1.0 |

Data from the CTS indicate that Bruce County primarily attracts adult travellers and secondarily adults with children and teens although PRTD survey respondents indicate different profiles, depending on the specific sector.⁴⁷ As an overall indicator, the CTS data corresponds to the overall PRTD survey feedback but sector survey feedback identifies a more diverse visitation profile (see Table 10). The diversity identified by the PRTD feedback is more inclusive, regarding life stages and who is attracted here as a tourist, and illustrates Bruce County’s broad appeal and the opportunities for developing targeted attractions.

Bruce County is, as has been stated above, a seasonal destination with about 46.0% of all visitations (domestic and international) in the third quarter (July to September) and about 58.0% of all domestic trips of Ontario residents.⁴⁸ This compares to Ontario with about 35% domestic travel in the third quarter. When considering just Ontario’s domestic travel in July and August, the peak tourism period, the numbers change to about 27% for Ontario and 47% for Bruce County. As a comparator, Grey County is about 23% for the third quarter and 15% for July and August.⁴⁹ Figure 4 summarises overall visitation by quarter with those for “adults” and “adults with children/teens”.

⁴⁷ The Northern Bruce County Advisory Committee felt that the response for this element should be “YES”; the Southern Advisory Committee and the PRTD team felt the response should be “NO”.

⁴⁸ Clark. 2004.

⁴⁹ Clark. 2004.

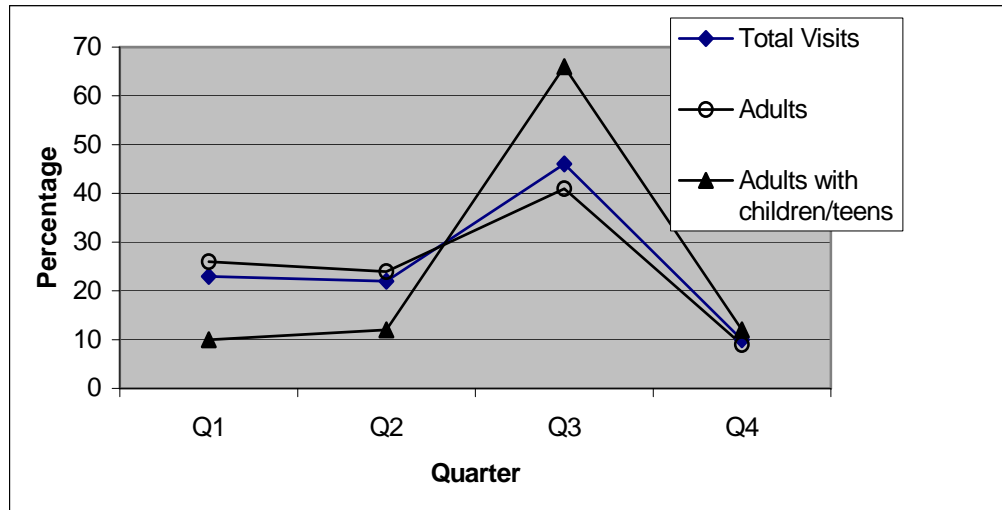


Figure 4: Visitation by Quarter for Two Segments of Visitors
 Source: PRTD and CTS data

To summarise, Bruce County, like many other rural-based tourism destinations, is subject to “seasonality” that is shaped by the institutional and natural causes. Institutional causes include religious, cultural, ethnic, social, and economic. Natural causes include variation in climate, hours of daylight and sunshine, minimum and maximum temperatures, rainfall, snowfall, and similar effects.⁵⁰

Phase II consultations confirmed the belief that Bruce County has strong tourism appeal, that this appeal is highly seasonal, and there is a need to expand the appeal beyond nature-based activities. Input recognized the need for businesses to work more co-operatively to extend the appeal into the shoulder seasons or to expand the core season to May to October. Success will come from both product development and co-operative, county-wide marketing. Several Phase II participants asked “how big do we want to grow?”, a question yet to be fully addressed. Some participants acknowledge that Bruce County as a destination is seasonal and little will change, therefore use the down-time to recuperate.

⁵⁰ For an expanded discussion, see Clark, 2004.

5.2 Occupancy and Yield Findings

*OVERALL RATING FOR OCCUPANCY and YIELD:
"Can the Occupancy and Yield Element be affirmed? - **NO**"*

Criteria and Measurement include:

The Destination's market performance in terms of:

- accommodations base occupancy
- guest expenditure levels

Occupancy rates reflect the seasonality of Bruce County while yield rates reflect seasonality and lower travel costs of the destination. Generally, occupancy is well below the 65% rate set as the criteria for the annual average rate in the PRTD Framework. The exception is the third quarter in which average quarterly occupancy rates in Bruce County hover around 80%.

Occupancy rates for the Central Ontario Region indicate a downward trend for the period 1997 to 2005 see Figure 5).⁵¹

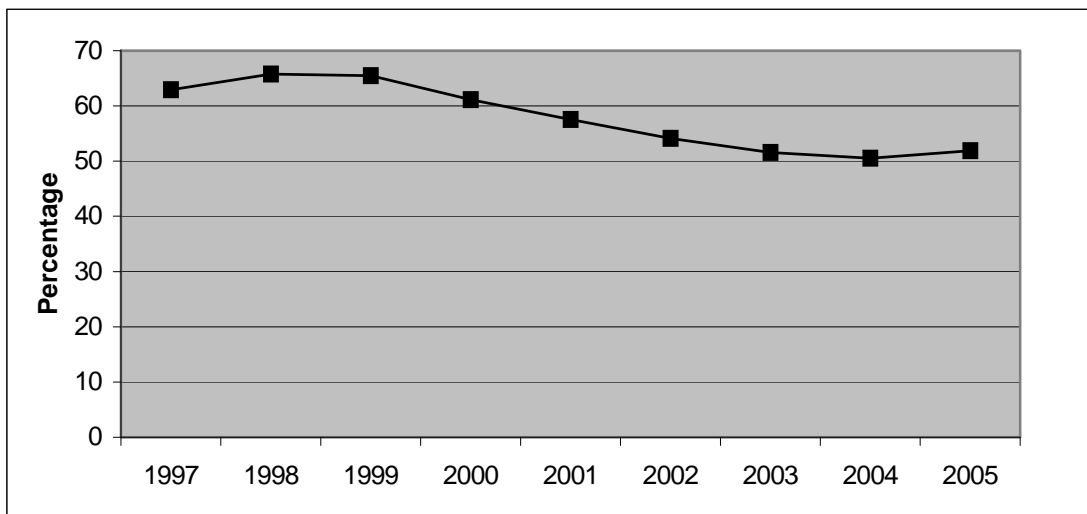


Figure 5: Occupancy Rates for the Central Ontario Region
Source: Ministry of Tourism. 2005

Of the PRTD survey respondents who operate seasonally, 57% have annual average occupancy rates less than 65% and of those operating year-round, 69.4% have rates less than 65%. There is variation across the year and, not surprisingly, the third quarter has high occupancy rates. Table 27 illustrates the quarterly flux for seasonal and year-round accommodations.

⁵¹ Ministry of Tourism. 2005. Hotel Operation Statistics in Ontario: 1997 to 2005. Pannell Kerr Forster Consulting Inc.

Table 27: Quarterly Flux for Seasonal and Year-round Accommodations
(Rates show Percentage with Occupancy Rates of More Than 65%)

| Quarter | Year-round Properties | Seasonal Properties |
|-----------|-----------------------|---------------------|
| | % | % (2) |
| First | 7.9 | 7.0 |
| Second | 16.8 | 22.7 |
| Third (1) | 78.9 | 83.1 |
| Fourth | 15.8 | 4.1 |

Notes (1): 44.0% of year-round properties report an occupancy rate of more than 84%; 49.4% of seasonal properties report a rate of more than 85%. (2) Some properties operate primarily during the “tourist season” but others have different operating “seasons”, hence the apparent contradiction of rates being reported for all quarters.

Source: PRTD surveys

Bruce County falls short when comparing visitor spending averages and its share of total provincial tourism spending. Both overnight and day-trippers spend far less than the provincial averages. Overnight visitors (per capita) spend an average of \$127.14 compared with the provincial average of \$270.27 or 53.0% less and day-trippers spend \$19.25 compared with \$62.59 or 69.2% less.

Table 28: Revenue and Visitation Shares for Bruce County and Ontario
for all Trips to Ontario

| | Day Trips | | Overnight Trips | |
|--------------|----------------|---------------------------|-----------------|--------------------------|
| | Trips 1000s | Revenue Millions \$ | Trips 1000s | Revenue Millions % |
| Ontario | 71,612 | 4,474 | 46,672 | 12,606 |
| Bruce County | 599 | 11.49 | 1,127 | 143.26 |

Source: CTS data supplied by PRTD outside consultant

Comparing visitation share with revenue share, day-trippers accounted for 1% of all day trips in Ontario trips and less than 1% (0.0026%) in revenue while overnight visitors accounted for 3% of provincial trips and 1% of revenue. Table 28 shows the actual revenue and visitations for Bruce County and Ontario.

Phase II consultation input reaffirmed the above findings. Again, expansion of the prime tourism season was seen as a strategy to occupancy and spending levels. Input identified attracting high-end niche markets as a partial solution to increasing both length of stay and higher levels of spending.

5.3 Critical Acclaim Findings

*OVERALL RATING FOR CRITICAL ACCLAIM:
"Can the Critical Acclaim Element be affirmed? - **YES**"*

Criteria and Measurement include:

The Destination is recognised as:

- a "must see/must do" generally or for a specific experience
- having a profile that contributes to the attractiveness of Ontario and Canada as destinations
- a top ranked place to visit

A number of critical acclaim indicators were identified through the PRTD Framework process which are, for the most part, not surprising to the Bruce County tourism industry.

A study in 2005 of the VFR market indicated strong support for Bruce County as a "must see" destination.⁵² In a county-wide survey, residents were asked about recommending Bruce County to family and friends who live outside of the area and asked for reasons why someone should visit the area. Of those asked, 96.7% recommend Bruce County as a place to visit; 96.4% stated they had asked family and friends to visit the area; and the reasons to visit included "interesting natural attractions (60.4% responded) and "activities they want to do" (40.9%).⁵³

The question regarding places the residents take their visitors (in the above survey) were not summarised but the extensive list includes, but is not limited to: beach(s), provincial parks, Sauble Beach, northern Bruce Peninsula, golfing, hiking, Kincardine, Tobermory, museum, restaurants, the Grotto (Bruce Peninsula National Park), and places within Grey County.

As "top-of-the-mind" attractions and destinations with Bruce County, the National Parks (Bruce Peninsula and Fathom Five), the Bruce Trail⁵⁴, Chi-Cheemaun, Tobermory, Sauble Beach, and three provincial parks are significant contributors to this perception. Most of these offer less crowded and less commercial alternatives to Grand Bend and Wasaga Beach. Several attractions of Bruce County contribute important "branding" or "marketing" imagery contributing to the overall appeal of both Ontario and Canada as a tourist destination. One of the strongest images, used in many promotions, is the "flower pots" of the Fathom Five National Marine Park. The flowerpots, and images such as Sauble Beach and lighthouses, are used in tourism magazines, Websites, calendars, newspapers, and post cards.⁵⁵

⁵² Smith. 2005.

⁵³ *ibid.* pages 8 and 9

⁵⁴ Bruce County has about 10% of the total length of the Bruce Trail within its boundaries.

⁵⁵ This is anecdotal evidence because an inventory of such materials has yet to be developed.

Bruce County, as a tourist destination, has received many honours. Table 29 itemizes the most recent ones.

Table 29: Indicators of “Best in Class”, “Number 1”, and “Top Tier” in Consumer and Industry Rankings

| Award or Recognition | Year | Source |
|---|---------|--|
| Best campaign under \$25,000 “Ride Grey Bruce” | 2006 | Ontario Tourism Marketing Partnership |
| Best Ride Guide “Ride Grey Bruce” | 2006 | International Motorcycle Supershow |
| Map Gallery Competition 2006/2007 Grey Bruce Tourism map | 2007 | ESRI Canada |
| Sauble Beach Number 1 beach in Ontario | undated | Toronto Star |
| Sauble Beach: One of Canada’s Top Ten Beaches | undated | MacLean’s magazine |
| Blue Flag – Sauble Beach | 2006 | Environmental Defence |
| Blue Flag – Sauble Beach | 2007 | Environmental Defence |
| Best Freshwater Beach in Canada | 2007 | Readers Digest |
| Blue Flag – Station Beach/Kincardine | 2007 | Environmental Defence |
| PumpkinFest – 3 three provincial awards | 2006 | Festivals and Events Ontario |

Media exposure has been significant over many years and this recognition continues in a wide variety of media, including the Internet. Recent media articles have included the: Ontario Government news wire (2006) for the “Ride Grey Bruce” award; Dive magazine (2003) for an article about diving in Tobermory; Globe and Mail (2004) for an article about the Bruce Trail; Globe and Mail (2002) for an article about cross-country [skiing] getaways; the Ottawa Citizen (2006) for Voyage Storytelling; Nature Conservancy of Canada (2002) Internet article about expansion of the national Park; Toronto Life magazine (undated Internet posting) about Lion’s Head; Wiarthon Willie receives annual international media exposure and attention every February 2nd; MacLean’s magazine (2004) article about Sauble Beach as a “best beach”; Shoreline Beacon/festivals and Events Ontario (2006) for three provincial awards for PumpkinFest; Festivals and Events Ontario named PumpkinFest as one of the top 50 events in Ontario; and the Owen Sound Sun Times article about the “Green Cottager” award received by the Friends of Sauble Beach from the (Spring) Cottage Life Show (2007).

Sauble Beach and Station Beach (Kincardine) join the ranks of only nine beaches in Canada and 2,600 worldwide (in 36 countries) to earn the important “Blue Flag” designation from Environmental Defence. This designation means media exposure, and as importantly, an assurance to travellers that these beaches meet the most stringent criteria for 27 “strict

standards based on water quality, environmental management, environmental education and safety and services".⁵⁶

Phase II consultations confirmed the above Phase I findings. Most participants strongly believe that Bruce County has lots to offer, some stating they believe Bruce's assets are under-developed and under exploited. Belief in the Bruce as a destination with lots to offer is one of the strongest messages to come out of Phase II consultations.

⁵⁶ http://www.saublebeach.com/blueflag_beach.htm. Retrieved from the Internet on 24 July 2007.

6. The Futurity Dimension

The Futurity Dimension includes three elements:

- I. Destination Marketing;
- J. Product Renewal; and,
- K. Managing within Carrying Capacities.

The futurity dimension indicates the extent to which Bruce County is “investing in its future as a place with viable and continuing attractiveness to evolving markets. Futurity helps Bruce County “identify whether and how the destination is actively matching its products to the expectations of the tourism marketplace, and taking advantage of the skills and knowledge of its travel trade assets”.⁵⁷

The following section not only summarizes the workbook, but incorporates findings and data from other sources, pertinent to Bruce County’s futurity.

⁵⁷ PRTD workbook. Page 34.

6.1 Destination Marketing Findings

*OVERALL RATING FOR DESTINATION MARKETING:
"Can the Destination Marketing Element be affirmed? - **YES**"*

Criteria and Measurement include:

The Destination Marketing criteria/measures identifies the extent to which the destination:

- targets viable markets
- invests in managing and promoting its tourism marketplace
- consults with the travel trade operators and agents serving area visitors and residents

Bruce County has a strong "outdoors" image. This image and perception of "The Bruce" is tied with the two national parks, three provincial parks, the Niagara Escarpment/Bruce Trail, and Sauble Beach. The demand for Bruce County's product offerings has, over the last ten years, reflected the normal ups and downs of tourism in Ontario but, overall, is up 9.4% since 1999. During the same time period, same-day trips were up 30.7%, overnight trips were up 5.8%, although overnight VFR trips are down 16.7%. As a comparison, Muskoka, during the same period, saw a decline in these same categories ranging from 13.4% to 53.8%. Similarly, Grey County's numbers were all up.

A Canadian Tourism Commission study covering 1997 and 2001 stated that outdoor tourism had grown by 15% and international demand is "expected to increase significantly". The growth is expected to come from young seniors and baby-boomers presently in the 35 to 55 year age bracket. Bruce County's Tourism's marketing and promotions strategy indicated that between 1998 and 2004, there was modest growth in overnight travel (1.0%+) and overnight pleasure travel (5.8%+). This indicates a possible short-term stability for tourism in Bruce County.

A special analysis of the TAMS data indicates that the population growth rate of the USA market will be slow or show a small decline from 2000 to 2025.⁵⁸ The same study indicates that overnight tourism will stagnate and demand for family-oriented products will decline.

Bruce County benefits from a DMO with an annual budget of about \$550,000. Although focused on Bruce County, the DMO coordinates some of its efforts with Grey County and Owen Sound and participates in a regional marketing/promotions strategy (Regional Tourism Marketing Partnership). About 10% of the Bruce County Tourism budget is dedicated to communications (see Figure 6-5). This budget is adequate to respond to the various requests for information and to maintain a highly visible Web presence. As is often case, more could be done with a larger budget.

⁵⁸ TAMS, 2002.

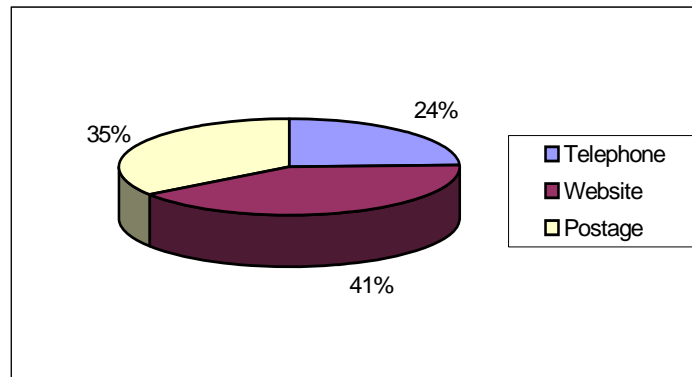


Figure 6: Bruce County Tourism's Communications Budget (\$49,000)
 Source: PRTD Workbook/Bruce County Tourism

Several Web-based surveys indicate Bruce County's marketing has an influence on visitors. The 2006 Adventure Passport Promotion contest generated about 1,363 entries and 109 (8.1%) provided feedback through an on-line survey (surveymonkey.com).⁵⁹ Of these, 58.7% were visitors to the area (travelling tourists and cottage owners). Several questions addressed the issue of influencing tourists' choices through ratings of statements on a 4-point Likert scale. The relevant statements are summarised in Table 6.

To an open-ended question about places "not previously visited in Bruce County", ninety-two respondents (including Bruce County residents) identified many places they had not previously visited. Similarly, seventy-five respondents provided a long list of places they had *not known about* previously.

In a survey of mountain bike park users, 99% (n=241) stated they would return and about 40% of these users found out about the park through the County's promotional materials; 12% through the Internet, 12% through the Adventure Passport promotion, 4% through radio/television, and 12% through a bike shop.

⁵⁹ See Clark, 2007a.

Table 30: Marketing Influence on Tourists' Motivation to Visit Bruce County

| Statement | Average Rating | |
|--|----------------|-------------------|
| | Non-residents | Cottage Residents |
| I feel the Passport program encourages me to invite more people up to visit me | 2.87 | 3.07 |
| I feel the Adventure Passport and guide [book] makes it easy for me to plan my holiday or weekend in the Bruce | 3.39 | 3.11 |
| The grand prizes is/was my motivation to complete the Adventure Passport | 3.13 | 2.94 |
| Exploring Bruce County is/was my motivation to complete the Adventure Passport | 3.37 | 3.50 |
| I will participate in this Adventure Passport program again | 3.70 | 3.78 |

In a study of the Bruce County VFR market, there are a number of indicators that Bruce County tourism influences the guest market. Residents were asked about resources they used to aid in planning their visitors' trip to Bruce County. Thirty-six percent (36%) stated they used guidebooks and 33.9% used the Internet. In a similar question, 40.1% used chambers of commerce, 24.9% used the County's tourism Website, 13.8% visited tourism staff at a local event, and 8.7% telephoned the County's tourism office. A safe assumption is that guidebooks and chambers of commerce material included County-produced marketing material. The above discussion provides indirect yet strong indicators that Bruce County Tourism's marketing media are used and do, indeed, influence visitors. (See Table 30)

An annual marketing and promotions strategy helps position Bruce County as a destination.⁶⁰ Its mission statement is:

"To position Bruce County as the number one 'nature-based' outdoor destination in Ontario"

Its key goals and objectives are:

- Complete signage pilot project in Saugeen Shores and Kincardine;
- To build off the success of the 2006 Passport Program and continue to offer consumers "a reason to visit";

⁶⁰ See Bruce County Tourism, 2007

- ❑ Increase tourism business in May, June, September, October and January & February;
- ❑ Continue to develop & market niche products such as: Lighthouses, Motorcycle Touring, Snowmobiling, Gardens, Mountain Biking, Birding, & Culinary/Agriculture tourism; and
- ❑ Work directly with producers in the Grey Bruce agricultural community to create an innovative approach to promoting 'Produced in Grey Bruce Products'.
- ❑ Marketing: continue building on the success of the present strategies
- ❑ Promotions and advertising: continue to reinforce Bruce County's "nature-based" brand
- ❑ Website/Internet: significant re-build of the Website to enhance easy access and user friendliness

Performance is monitored through an annual marketing and promotions strategy that includes assessments of past years performances with comparison to competitive destinations. The report makes use of statistics from both Statistics Canada and the Ontario Ministry of Tourism. In addition, one-off studies of timely issues are undertaken and have included the VFR market (2005), mountain bike park users (2005), an Internet user study (2004), Adventure Bruce Passport Survey (2005 and 2006), and most recently, the Premier-ranked Tourist Destination Framework study (2006-2007).⁶¹

Customer service training, as an important component of overall marketing and promotional activity, is somewhat lacking in Bruce County. This is stated with qualifications. Of those responding to the PRTD survey question regarding customer service training (n=339; 71.4%), 32.4% (n=116) stated they have some form of staff training that includes Smart Serve, Super Host, participation in fam tours, some professional training models, and in-house or owner/manager-developed. The most frequently mentioned training was owner run and developed or in-house. The next most frequently mentioned was Smart Serve, which is a liability-oriented, alcohol service programme. Clearly there are real and perceived needs for staff training but there is a lack of consistency across Bruce County. Unfortunately, the quality of some of the training is an unknown although it should not be assumed that, for instance, in-house training is not of a high standard - it may well meet or exceed "branded" training.

An aspect of the training that was not addressed in the survey, but should be considered, is knowledge of Bruce County's tourism attractions, activities, and natural features by the many seasonal staff, operating front-line and are often the main face-to-face with tourists. Further development work in this area should be done.

⁶¹ See Clark 2007a,b; Smith 2004, 2005

Consultation with tour operators and travel receptives was attempted although only one of each responded.⁶² Through the PRTD research, it was determined that there is only one receptive operating part-time/occasionally within Bruce County. Feedback provided a sense of what travel agents have or would consider “top choices” for tours to this area. Table 31 provides a summary of responses from the two responding agents.

Table 31: Top Six Attractions Identified by Travel Agents

| Rank | Have Included on a Tour | Would Include on a Tour |
|------|--|------------------------------------|
| 1 | Tobermory/Chi-Cheemaun | Bruce Trail |
| 2 | Sauble Beach/Sauble Falls | Tobermory |
| 3 | Oliphant area/Orchids | Flower Pot Island |
| 4 | Tour along Grey Rd 1 – Owen Sound to Wiarton | Chantry Island Lighthouse and tour |
| 5 | Warton Willie home and statue | Bruce County Museum |
| 6 | Handicraft House | Bruce Power Information Centre |

Themes that emerged from Phase II consultations stressed a number of points:

- too many communities are in competition with each other instead of co-operating for tourists;
- too many tourism-oriented marketing organizations are in competition instead of co-operation;
- the present regional tourism marketing partnership is a strength;
- the “market” for Bruce County needs to expand into culture and heritage;
- higher-end niche markets should be developed;
- protecting the environment is critical to continuing to success;
- “greening” and eco-tourism will be important to tourism development;
- protecting “what we have” (ruralness, lifestyle, rural values, vibrant small towns) are important values; and,
- agriculture and food tourism could be significant product developments.

The strongest message was to improve co-operation amongst all tourism partners and stakeholders. Chambers of Commerce, municipal DMOs, and DIAs/BIAs are typically member-based, and must fund their activities from limited sources of income, often memberships and advertising revenue. This is often a barrier to developing capacity (staff, marketing resources, sustainability), creating significant gaps in service. Bruce County tourism

⁶² A survey sent to travel agents consisted of 11 questions of which 8 were simple one-word or scale questions and 3 short answers. The survey was offered on-line and as a return postage paid hard copy.

industry could benefit from a “who does what”, industry-driven assessment and clarification of role and function. A tool that could be used to facilitate such an assessment is included on the report’s CD (see Appendix K).

6.2 Product Renewal Findings

*OVERALL RATING FOR PRODUCT RENEWAL:
"Can the Product Renewal Element be affirmed? - **YES**"*

Criteria and Measurement includes:

The extent to which the destination is making capital improvements/investments in its attractiveness for the future

In the past five years, business owners have invested \$26.8 million in a range of business and capital improvements, of which \$17.3 million occurred in the past two years. PRTD survey respondents report (in rank order) investments in the following broad categories: expanding or adding to an existing business; upgrades and repairs; renovations; aesthetic enhancements; new amenities; and, equipment. Investments in land improvements and signage were also reported.

The "top" investment sectors, as reported by survey respondents, were accommodations (\$15.1 million), food and beverage establishments (\$2.4 million), marinas (\$1.5 million), and retail (\$1.2 million). Parks investments included the Bruce Peninsula National Park Visitor Centre (\$7.82 million) and the reopening of Inverhuron Provincial Park in 2005 (investment value unknown).

Through the PRDT process, together with the Advisory Committees, underdeveloped and under-performing assets were identified, and investment and reinvestment in these assets was noticeably absent or low. It is as likely that reporting capital investments, through the PRTD process, was, for privacy concerns, not done.

The PRTD research process has helped to establish a "benchmark" against which to measure future investments.

Phase II consultation input stated a belief that the area suffers from a tired and deteriorating accommodations base. This issue is seen as a deterrent to attracting international and high-end tourists. Attracting brand named hotels and motels was identified as a short-term goal.

Although the idea of a single, large attraction (such as an amusement park) was put forth by several participants, it received 17.6% support (important or very important) on the on-line, industry-wide survey. Adding in "somewhat important" responses gives the idea 47.5% support as an investment strategy.

Additional input supported better exploitation of under-performing and underdeveloped resources, although which specific assets was not addressed.

6.3 Managing Within Carrying Capacities Findings

OVERALL RATING FOR PRODUCT RENEWAL:

*“Can Managing within Carrying Capacities be affirmed? - **YES**”*

Criteria and Measurement assesses the extent to which the destination is aware of and manages within the capacity thresholds of is:

- local economy
- ecosystems setting and soft services infrastructure
- guest’s satisfaction levels
- hard services infrastructure
- administrative systems

Although this element is “affirmed”, it is a weak confirmation. Overall, the PRTD staff and the Advisory Committees agreed that the “yeses” outweighed the “no”s and “almost”s. It was acknowledged that without action in the near future, this element would likely be rated “no” in subsequent PRTD or similar studies.

In assessing Bruce County’s tourism visitation and economic health, reference can be made to past years’ performances. Several reports are available. A regional tourism profile for Bruce County generated on-line using a resource provided by the Ministry of Tourism indicates that total visitation in 2004 was 4.2% higher than the 1998 to 2004 average with only one year (2002) higher.⁶³ Overnight visitation was down by 2.8%, USA visitation was down by 3.0%, and same-day was up by 20.4% (see Figure 7).

Total visitor spending in Bruce County (2004) was \$154.76 million with \$123.20 million by Ontarians, \$7.67 by other Canadians, \$17.95 million by US visitors, and \$5.93 million by other international. This spending had an economic impact of 105.40 million in direct, indirect, and induced contributions to gross domestic product. This, in turn, resulted in 1,870 part-time, full-time, and seasonal jobs.⁶⁴

Another study covering 1996 to 2001 found that Bruce County had a positive, net tourism balance.⁶⁵ Using a spatial analytic technique (location quotients, commonly used in economic geography), a comparison of tourism imports and exports are compared and an “index” is created.⁶⁶ Between 1996 and 2001, Bruce County’s Tourism-Potential Index (T-PI) grew from 1.6 to 2.1 indicating a significant increase as a destination. Annual application of the T-PI can be used as an early-warning system of change, both positive and negative.

⁶³ See Ministry of Tourism, 2006b

⁶⁴ Ibid.

⁶⁵ See Clark, 2004

⁶⁶ For more information about location quotients, see Smith, 1977.

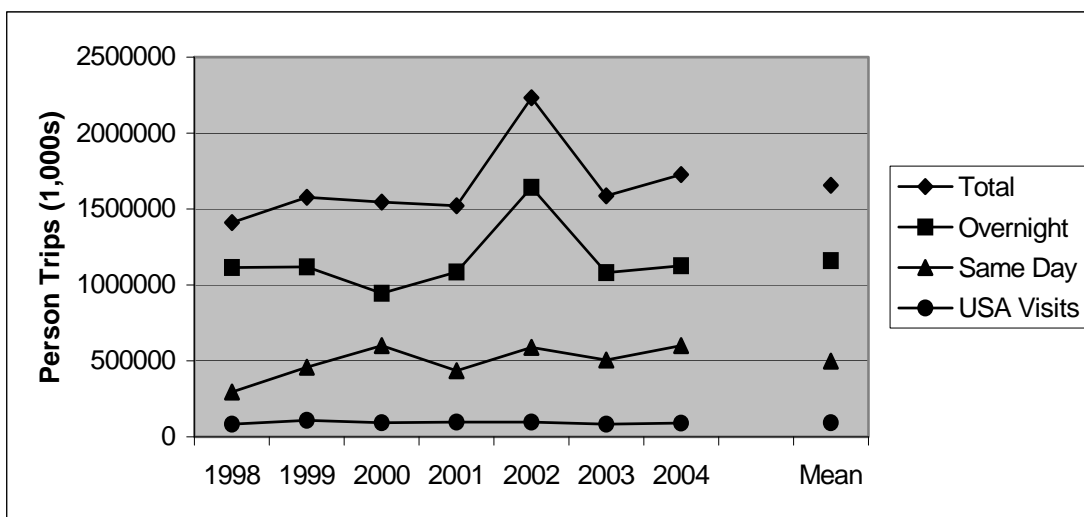


Figure 7: Visitation from 1998 to 2004

Source: Ministry of Tourism Website, 2006

Costs and benefits are not, at present, balanced equitably across municipal boundaries. Benefits accrue mostly to the key tourist destinations and as wages to those working in the tourism sector (who come from all areas of the county). Costs (e.g., infrastructure, marketing, and services) are more likely to be borne by all municipalities through County taxation, with some costs destination-specific (e.g., traffic and garbage associated with high tourism demand at Sauble Beach). There is some “leakage” of monies out of the region through non-resident, seasonal business owners, those who operate during the tourist season and live in other locales the rest of the year. Provincial and federal taxes, and the need to import goods and services into the County represent others sources of leakage. Other monies leave the County through wages paid to residents of nearby counties.

There is, at present, an imbalance in the demand for tourism products in Bruce County. This demand favours the Lake Huron and Georgian Bay shorelines, the upper Bruce Peninsula (especially Tobermory), and a few inland areas (such as communities on prime inland rivers and lakes that support canoe/kayak tourism). Some niche markets such as garden touring, golfing, nature-based photography and arts, and hiking are less reliant on shoreline tourism. Through initiatives such as Bruce County Tourism’s Adventure Passport promotion, inland communities are starting to “get noticed” and this was very evident through the 2007 feedback survey. Many survey respondents identified many communities, inland included, that they had not known about and had not visited. The economic impact to these communities of this initiative has not been measured but should be considered, especially if findings indicate this is an effective technique for

broadening tourism benefits to typically non-tourism areas. It could have important implications for other regions as well.

Another indicator of managing within carrying capacities, as identified in the PRTD Framework process, is the cost of housing; specifically, has the cost of housing risen to an extent that it is unaffordable to the locally employed population? Table 32 shows the average value of dwellings, percentage of owned housing of the total housing stock, and median household incomes for municipalities within Bruce County and neighbouring counties. All data are from the 2001 census, the last complete data available.

Table 32: Average Value of Dwelling, Housing Ownership, and Median Household Incomes as Indicators of Housing Affordability

| | Housing Affordability Indicators | | | |
|----------------------------|----------------------------------|--|--------------------------------|-------------------------|
| | Average Dwelling Value \$ | As a Percentage of Bruce County Average % | Housing Ownership (owned) % | Median Household Income |
| <i>Ontario</i> | 199,884 | +52.3 | 67.8 | 53,626 |
| <i>Grey County</i> | 150,214 | +14.5 | 77.2 | 43,107 |
| <i>Huron County</i> | 136,785 | -4.2 | 77.6 | 45,885 |
| <i>Bruce County</i> | 131,247 | 100.0 | 80.7 | 45,369 |
| Arran-Elderslie | 114,940 | -12.4 | 81.5 | 42,734 |
| Brockton | 128,430 | -2.1 | 77.5 | 42,516 |
| Huron-Kinloss | 133,425 | +1.7 | 84.8 | 44,609 |
| Kincardine | 130,841 | -0.3 | 77.9 | 52,911 |
| N. Bruce Peninsula | 126,911 | -3.3 | 85.9 | 36,467 |
| Saugeen Shores | 146,449 | +11.6 | 79.1 | 55,883 |
| South Bruce | 122,508 | -6.7 | 82.9 | 48,142 |
| S. Bruce Peninsula | 129,964 | -1.0 | 83.0 | 41,334 |

Source: Statistics Canada, 2001 Census.

With the exception of Saugeen Shores (formerly Port Elgin and Southampton), housing appears to be affordable as evidenced by, when compared to other counties and Ontario, higher rates of ownership (versus renting) and average dwelling values. With one exception (Saugeen Shores) all incomes are lower than the Ontario median although all percentages of housing ownership are lower than the Ontario median. Tourism, then, seems not to have affected the cost of housing in Bruce County, with one lone exception, Saugeen Shores. In contrast, Bruce County residents were asked about their perceptions of tourism on a number of "quality of life" statements with 82.7% agreeing with the statement: "The presence of tourism leads to

increased housing prices”.⁶⁷ This apparent “reality-perception” conflict might benefit from further exploration and open discussion.

Several stressors are evident in the demand for accommodations and construction contracting services. One stressor likely will affect housing prices in the Kincardine-Port Elgin area and a shortage of local people available for employment in the tourism industry. Anecdotal information indicates that Bruce Power construction workers who rent on a long-term basis have monopolized rental cottages, motels and hotel rooms, and similar accommodations, available for tourists in past years. With the planned rebuild and restart of two reactor units, this will be exacerbated in coming years with the employment of about 1,700 people.⁶⁸ It can reasonably be expected that housing costs might also increase over the coming years. The restart will tap into the existing labour force with many people opting for higher paying and higher profile jobs at Bruce Power instead of seasonal jobs in tourism.

Again, anecdotal information indicates that full-time residents often have more difficulty getting trades people (plumbing, electricians, carpenters) during the summer when demand by seasonal cottagers and tourism-reliant businesses create extra demand on these services. This might be perception versus reality but in any case it has not been documented. Further study might be warranted, including exploration of increased trades rates during the summer.

PRTD survey respondents (63%) stated that, overall, there is an available trained labour force to satisfy demand. But, this did vary by sectors and a breakdown is shown in Table 33. A study by the local Training Board found that 83% of employers indicated they *did not* have a great deal of difficulty finding employees.⁶⁹ Because of the wide range of responses of those agreeing and disagreeing regarding pool of sufficient labour and the Training Board findings, a separate labour force study exploring employments needs in the tourism industry, specific to Bruce County, is warranted.

Overall, seeking guest feedback through surveys and comment cards is an area of weakness in all sectors but one. Of all PRTD survey responses, only 26% stated they provide guest comment cards or surveys. This varied with a low of 7% (adventure outfitters) to a high of 67% (marinas). This paucity of feedback and a lack of a centralized repository for visitor feedback (e.g., Bruce County Tourism) means little *direct* knowledge of the visitor experience is known. Further study of how this could be provided county-wide should be explored.

⁶⁷ See Smith, 2005.

⁶⁸ The Bruce “A” restarted is expected to cost \$4.25 billion and at its peak employ 1,700 people. <http://www.brucepower.com/pagecontentU12.aspx?navuid=29>

⁶⁹ See Website for the Bruce Grey Huron Perth Training Board. <http://www.trainingboard.ca/>

Table 33: Perception of Sufficient Pool of Trained Labour by Sector

| Sector | Sufficient Trained Labour % |
|----------------------|-----------------------------|
| All respondents | 63 |
| Accommodation | 67 |
| Food and Beverage | 32 |
| Retail | 59 |
| Golf | 50 |
| Marina | 25 |
| Adventure/Outfitters | 64 |
| Tours and Excursions | 83 |
| Attractions | 82 |
| Festivals and Events | 75 |

Source: PRTD Workbook, 2007

An important factor to consider in assessing a destination's health is how well it monitors and is prepared to respond to stresses on the natural systems that sustain the local ecosystems. The Grey Bruce Health Unit (public health agency) regularly monitors water quality at twenty-three beaches in Bruce County and twenty-four in Grey County. Sampling is done about weekly, testing for E. coli and chemical contamination as warranted. Adverse tests result in "postings" advising beach users of the potential of health risks.

The "Blue Flag" programme awards beaches and marinas for meeting twenty-seven criteria in a number of categories: water quality; environmental management; environmental education; and safety and services. Sauble Beach received the right to fly the Blue Flag in 2006 and 2007 and Kincardine's Station Beach in 2007. National and provincial parks utilise an in-house programme. Beyond any municipal monitoring programmes that might exist (such as mandatory sewer inspections), no regular systems were identified through the PRTD Framework process.

Through various monitoring processes and anecdotal evidence, several issues have been identified, with thresholds being stressed. Water quality concerns (lakes and ground water) have been identified for Sauble Beach, Point Clark, and the Marl Lakes (specifically Lake Rosaline). The need for sanitary sewers to replace the thousands of septic systems, have been identified for Sauble Beach.

Traffic congestion, often peaking during high tourist demand periods such as long weekends, have been identified for Sauble Beach, Saugeen Shores, Tobermory, and long lines of traffic through Wiarton have been noted as a regular summer problem. With one exception, the PRTD research did not identify plans to resolve these problems. Saugeen Shores has addressed the traffic issue in its 2006 Official Plan and states that the present infrastructure

and carrying capacity can accommodate projected traffic volume until 2020. Monitoring will continue with a by-pass road being put forth by concerned residents as a possible solution.

In a one-off study in 2005, twenty-eight “quality of life” statements had been ranked by Bruce County residents, most received agreement rates above 50%.⁷⁰ Those comments that received ratings, less than 50% agreement, included traffic problems, increased housing prices, more litter, parking problems, favourite places over-crowded, and general higher cost of living. This study could be replicated every two to three years as an early warning, monitoring tool.

Traffic related problems are the most noticeable of the “issues” particularly in high tourism destinations such as Sauble Beach, Port Elgin/Southampton, Tobermory, and Hepworth to Sauble Beach. The “traffic problem” is exaggerated during long weekends.

Generally, the present infrastructure supports present visitation levels although no formal strategic or official plans were noted that measure current capacity against a projected future demand, hence potential gaps have not been identified.

Roads: All roads at three levels of government are able to handle present and future capacity. The assessment ranges from “adequate” to “very good”.⁷¹ The “adequate” rating applies mostly to municipal roads and in specific situations such as roads leading to remote/isolated tourism resources, for example, lighthouses. Recently, municipal and county governments undertook a roads needs assessment, which resulted in a reciprocal transfer of ownership of some roads. This resulted in capacity and quality improvement for roads suitable for tourism traffic. A major road improvement is being undertaken for County Road 10 (the Grey Bruce Line) and is funded by Bruce and Grey Counties and the Province of Ontario. Some roads are “stressed” during peak periods and in high-demand tourist destination areas.

The Chi-Cheemaun is a critical link between Southwestern Ontario and Ontario’s near-north region and as an alternative route to western Canada, and has capacity for increased traffic. Presently, much of the Ch-Cheemaun traffic is “flow through” in nature with Bruce County retaining about 9.7% of the traffic.⁷²

Parking: Parking issues in high-demand tourist areas have been addressed although peak periods in some communities (e.g., Tobermory, Sauble Beach)

⁷⁰ See Smith, 2005.

⁷¹ Chris LaForest, Director, Planning and Economic Development. County of Bruce. Interview. 16 February 2007.

⁷² Owen Sound Transportation Company internal report. (2004). Private communication with Ian Dean.

are pushed to the limits. Some improvements to parking facilities have been made thereby increasing shoulder season parking capacity as a side benefit.

Trails: Bruce County's goal is to be the "#1 trail destination in Ontario". Present capacity can accommodate current use and projected use although some deficits do exist. Sauble Beach and Inverhuron Provincial Parks could use more trails or capacity to accommodate the growing use of trails associated with increased park visitation. Use of trails is not at a level that has caused environmental degradation and trails are not over-crowded. Joint promotion and integrated trails with national and provincial parks could increase trail use, hence increased tourism.

Trails for motorized vehicles (e.g., ATVs) do not exist in Bruce County although anecdotal information gathered at the December 2006 and January 2007 motorcycle shows indicate some demand for such trails.

Tourism has been identified as an important element of an overall economic development strategy for and within Bruce County, at upper and lower tiers of government. The County has embedded this support in its Official Plan (adopted 1997 and approved by the OMB 1999) as follows:

Economic [Goals] [to] recognize, promote and strengthen tourism as a viable, vital component of the County economy. (Source: Section: County Goals 3.4.1.5)

An example of lower tier support comes from the Official Plan of The Northern Bruce Peninsula.

Develop a long-term improvement programme for the downtown / harbour areas within Tobermory and Lion's Head, making these areas a (sic) pedestrian friendly tourism destination (sic). (Source: Official Plan, Tobermory, Lion's Head, and Ferndale: Section 3.2.3.1)

There is a staff complement of 20 in the combined tourism, trails, and planning departments and local and out-of-area consultants able to add additional expertise to specific projects and research needs. The 10-month long Premier-ranked Tourist Destination Framework project and this present strategic plan development are examples of the commitment to tourism planning and development by the County. The County is well positioned to move forward with actions necessary to develop a sustainable tourism destination.

Phase II participants identified a number of issues of concern for managing with carrying capacities. These included: 1) acknowledgement of environmental stresses on the communities of Sauble Beach and Tobermory due to a lack of municipal water and sewage treatments; 2) potential for environmental stress from overuse of national and provincial parks,

ecologically sensitive areas, and simply too many tourists during the peak tourism season; 3) traffic congestion during peak times in Sauble Beach, Tobermory, Port Elgin, and Southampton; 4) generally a tired infrastructure through the region; 5) recognition that much of the demand for tourism is along the Lake Huron and Georgian Bay shorelines and direct benefits do not accrue to the inland communities; 6) a lack of co-ordinated information delivery of statistics to help inform tourism-oriented business decisions; and, a desire to be more involved in the planning and decision-making process.

None of these issues were delivered with a significant urgency but rather with a need that they be addressed sooner than later. The exception is the need to address water and sewage treatment in Sauble Beach as any significant delays will affect Lake Huron water quality and thereby affect tourism visitation numbers.

6.5 Linking Current Performance to Future Planning

The final step in the PRTD Framework process was to identify weaknesses of the present situation, identify agencies responsible, ranking priorities for action, and determine possible responses to those weaknesses. The following sections pull together the research and consultation findings, culminating in a set of recommendations (Table 37) that answer the question, "What do we do now?" Linking current performance to future planning is the task of the strategic plan. The *key function* of the draft comprehensive tourism research strategy and reporting cycle (Table 4) is to ensure that Bruce County's tourism industry continues to monitor itself as an effective way to stay competitive and relevant to tourists' needs.

6.5.1 Phase I Findings

Table 34 outlines the initial thoughts by the PRTD Team and Advisory Committees. Further development of this step (including addressing strengths and challenges) was undertaken as part of the comprehensive strategic planning process. The PRTD Workbook has a comprehensive list of responses, of which all items have significant merit, as elements of a strategic response to the present situation and possible future scenarios.

Table 34: Areas of Weakness, Agency Responsibility, and Priority

| Weakness | Responsible or Lead Agency or Organization | Priority |
|--|---|----------|
| Seasonal destination | Bruce County Tourism lead Bruce County businesses | High |
| Signage | Bruce County Tourism Bruce County Highways | High |
| On-line purchases development | Various Presently under development by Grey Bruce Your Way (Bruce Community Futures Development Corporation) | High |
| Culture/Historic product development | Individual municipalities | Medium |
| Culinary tourism/high-end dining options | Bruce County Tourism lead Individual or consortiums of entrepreneurs | Medium |
| Customer satisfaction surveys | Bruce County Tourism lead | Medium |
| Attract "branded" accommodations | Individual or consortiums of entrepreneurs | Medium |

Table 34 identifies a number of preliminary weaknesses and identification of lead agencies as identified by the PRTD Phase I team. This section of the workbook was not completed as well as the PRTD Phase I team would have liked, requiring a more in-depth approach and analysis. The team decided to defer that process to the Phase II consulting process. Further development of these ideas was undertaken through Phase II, the strategic planning initiative, with significant input through interviews, a focus group, and a survey.

6.5.2 Phase II Findings

As noted in 6.5.1, the Phase I process of identifying weaknesses, agency responsibility, and priority required a more in-depth approach than was possible at the time. That task, combined with identifying strengths, was undertaken as a major component of Phase II with broad industry input. The

findings are highlighted in Tables 34 (priorities) and 36 (strengths and weaknesses). These are carried forward into the ten-year strategic plan.

To establish draft time lines and priorities, several inputs were used as references.⁷³ First, focus group participants identified their individual priorities by voting for specific initiatives or development ideas. Second, the initiatives and development ideas were submitted to broader industry input through an on-line survey to generate rankings of importance for each item. Finally, the project consultants have added their perspective assessed against estimated availability of resources (human, financial, time), ease of initiating development, perception of the importance of an idea/issue, and within the context of the overall strategic plan. The contents of this table were used to inform the time lines and priorities on Gantt Chart (Table 4) in the strategic Plan.

Time lines and priority ratings are submitted as “draft” and should be reviewed by those tasked to implement the various recommendations and deliverables, to ensure they meet actual and changing resources and priorities. Some issues (such as “economic sectoral champions needed”) had not been included in the on-line survey. These, and other issues, were identified after the focus groups, through interviews that took place after the on-line survey.

⁷³ Because of the consultation process, focus group and on-line survey inputs were collected prior to the development of recommendations and deliverables. Hence, the information in Table 34 is included in final rankings on the Gantt Chart (Table 4) but Table 34 does not include all of the deliverables in the Gantt Chart.

Table 35: A Set of Indicators to Establish Priorities and Time-lines for Implementing the Bruce County Tourism Industry Strategic Plan

| Initiative or Development | Focus Group (Votes & Target Year) (See Note 1) | On-line Survey Rankings (% agreeing with statement) | Consultants' Perspective (Priority - Timeline) (Note 2) |
|---|--|---|---|
| Value & develop arts, culture, heritage resources | 3 (2008) | 67-77 | M – M |
| Bundling of value-added experiences [is] #1; need for packages | 3 (2008) | - | L – M |
| Economic sectoral champions needed | 3 (2008) | - | H – M |
| Clean beaches and pristine environment | 3 (2008) | 93-97 | H – M |
| Develop Farmers' Markets | 2 (2008) | 66 | L – L |
| Development of live theatre and music | 1 (2008) | - | M – L |
| Develop sectoral synergy | 1 (2008) | 74 | H – M |
| More washrooms & frequent garbage collection (Sauble Beach) | 1 (2008) | - | H – M |
| Formal tourism education, look to Europe & Asia | 1 (2008) | - | L - L |
| Educate businesses & tourism partners about tourism trends, especially the baby-boomer economy/demographics | 1 (2008) | - | M - M |
| Aesthetic pastoral improvements | 1 (2008) | - | L – L |
| Co-operation between various groups | 1 (2008) | 82 | H – M |
| Source water protection; sewage treatment | 4 (2008/09) | - | H – L |
| Better tourism signage | 6 (2009) | 95 | H – S |
| Collective promotion of shoulder season | 3 (2009) | 95 | M – L |
| Collective promotion of shoulder season | 3 (2009) | 95 | M – L |
| Development of "green" image; attain "green" image & eco-tourism | 3 (2009) | 74-88 | H – M |

| Initiative or Development | Focus Group (Votes & Target Year) (See Note 1) | On-line Survey Rankings (% agreeing with statement) | Consultants' Perspective (Priority - Timeline) (Note 2) |
|---|--|---|---|
| Co-operation has to be improved by local councils & tourism industry | 1 (2009) | - | H – M |
| Education & training of tourism operators | 6 (2010) | 89-90 | H – S |
| Become trail capital of Ontario | 5 (2010) | 79 | M – M |
| Better cell phone & Internet service visitors & residents/businesses | 2 (2010) | 75 | M – M |
| Improve wireless infrastructure | 1 (2010) | - | M – M |
| Bus routes between towns | 1 (2010) | - | L – L |
| Develop "The River" [Saugeen]; fish, canoe, trail | 1 (2010) | - | M – L |
| Most marketing is Web-based | 1 (2010) | - | M – M |
| Heritage building preservation, develop streetscapes & small-town theme plans | 6 (2011) | 73-85 | H – L |
| More washrooms & rest stops along Highway 6 | 3 (2011) | 56 | L – L |
| Maintain or increase natural public space | 2 (2011) | 73 | M – L |
| May to October is "core" season | 3 (2012) | 92-93 | M – L |
| Attract/develop up-scale hotels | 1 (2012) | - | M – L |
| First Nations development collaborations | 2 (2013) | 67 | M – L |
| Bike routes town-to-town | 1 (2013) | - | M – M |
| Politics taken out of t'ism | 5 (2017) | - | M – L |

6.6 Strengths and Weaknesses

Table 36 (Strengths and Weaknesses of the Bruce County Tourism Industry and Environment) was developed from industry-wide input (in Phase II) gathered through consultations, including interviews and focus groups. Strengths and weaknesses also came out of Phase I, which consisted of the county-wide surveys which feed into the PRTD workbook, included interviews and focus groups. Additional input was gathered through intelligence gathering from such sources as the media and unsolicited feedback from individuals, primarily via e-mails.

The strengths and weaknesses table provides a snapshot of the industry as perceived by the industry itself. The information provided significant direction for the recommendations and deliverables. The “weaknesses” should be viewed as “challenges” to be overcome rather than “barriers”. Some, such as a strong Canadian dollar is a barrier to the mass US traveller but high-end niche markets might be the solution.

Although the PRTD process does not include directions to gather resident input, Bruce County is fortunate to have commissioned a study of resident opinions and attitudes about tourism, which has been included in this report elsewhere.⁷⁴ The importance of continuing to include resident input has been addressed in the strategic plan and in a proposed annual cycle of planning (see Section 3.4: A Draft Research Agenda, Table 4).

⁷⁴ See Smith, 2005.

Table 36: Strengths and Weaknesses of the Bruce County Tourism Industry and Environment

| Product | Strength | Weakness |
|---------|---|--|
| | <ul style="list-style-type: none"> ❑ Strong “core” nature attractions⁷⁵ ❑ Strong nature-based products ❑ Outdoor core attractions form a regional cluster ❑ Wide range of on-theme and supporting attractions ❑ Unique geographic/geologic activities are possible ❑ Strong US and International appeal of area and potential for growth | <ul style="list-style-type: none"> ❑ Culture and heritage experiences/products are under-developed/under-performing and not well inventoried ❑ Need for training for front-line, owners towards development of a service culture ❑ Many businesses throughout Bruce have hours of operation that do not meet tourists’ needs ❑ Some sub-sectors foresee a shortage of available trained labour ❑ Accommodations base lacks high-end stock to meet perceived needs of international travellers ❑ Over abundance of lower-end accommodations stock ❑ Lack of high-end dining opportunities ❑ Business owners stated difficulty finding information (statistics, research, reports) to support business decisions ❑ Data on visitor satisfaction are lacking |

⁷⁵ Core attractions are: beaches, Bruce Peninsula National Park, Fathom Five National Marine Park, Niagara Escarpment and Bruce Trail, three provincial parks

| Performance | Strength | Weakness |
|-------------|--|---|
| | <ul style="list-style-type: none"> ❑ Strong 3rd quarter visitation numbers ❑ Transportation infrastructure able to support present and forecasted traffic ❑ High number of season residents with strong potential for VFR ❑ Broad market appeal of segments ❑ Strong overnight market ❑ Activities have a wide range of price points ❑ Potential for food/agri/culinary tourism, especially high-end ❑ Very high 3rd quarter accommodation rates ❑ All expenditures are below provincial averages ❑ Anecdotal evidence indicates strong critical acclaim ❑ Strong national and international “imagery”, especially nature-based | <ul style="list-style-type: none"> ❑ Lack of consistent customer service standards ❑ Lack of baseline data/benchmarks, consistent measurement models, and reference points ❑ Need for measurements on many annual operations that contribute to performance and futurity ❑ Lack of intra-regional public transit ❑ Only 40% of PRTD survey respondents indicated bus parking available ❑ US border and regulations a barrier and will continue to be in the future ❑ Core attractions lack year-round appeal ❑ Majority of accommodations (seasonal and year-round) have low and declining occupancy rates ❑ Lack of visitor-grounded data on levels of satisfaction |

| Futurity | Strength | Weakness |
|----------|--|--|
| | <ul style="list-style-type: none"> ❑ Bruce County Tourism develops an annual marketing plan with analysis of past performance ❑ Adventure Bruce promotion successful ❑ Bruce County Tourism Website solid source of tourism information ❑ Regional marketing approach (RTMP) ❑ New regional tourism map ❑ Several themed, regional promotions including motorcycle, lighthouses, snowmobiling, golf ❑ Continuing support for dedicated County DMO ❑ BCT at present is funded at a sufficient level to undertake successful marketing ❑ Tourism is represented at the County committee level (Agriculture, Tourism, and Planning) ❑ PRTD Framework study identified under-developed/under-performing assets ❑ Several large markets within 3-hour drive (6.9 million people) | <ul style="list-style-type: none"> ❑ Lack of co-ordinated marketing/promotion and collaboration amongst businesses, chambers, tourism groups, and government ❑ Too many tourism publications, causes confusion for tourists ❑ Competition amongst communities rather than co-operation and collaboration ❑ Lack of consistent hours for information centres and hours that do not meet tourists' needs ❑ Regional approach lacks integrated tourism Website presence ❑ Many front-line workers (esp. seasonal staff) lack good knowledge of area attractions, events, activities ❑ Infrastructure is "tired" and in some cases lacking (e.g., sewer and water in Sauble Beach) ❑ No true sense of residents' support for tourism and tourism development ❑ Lacking good cell phone and high-speed Internet/WiFi services ❑ Signage identifying tourism attractions needs improvement ❑ Lack of comprehensive inventory of assets to support shoulder season development (based on geography, resource type) |

| Futurity | Strength | Weakness |
|----------|--|---|
| | <ul style="list-style-type: none"> ❑ \$26.8 million invested in facility renewal, expansion, and development in a five-year period ❑ Investment in accommodations seems strong at \$15.1 million ❑ Survey respondents indicate sufficient trained labour (65%) ❑ Some monitoring of environmental quality (Health Unit and beach water; Blue Flags; provincial and national parks have in-house monitoring) ❑ Infrastructure can accommodate present and near-future demand ❑ Chi-Cheemaun can handle more traffic ❑ Tourism is officially recognized in the County's Official Plan and those of lower tiers ❑ Political support for several tourism initiatives (trails, signage, tourism planning, and tourism staffing level, tourism marketing budget) | <ul style="list-style-type: none"> ❑ Lacking sound, research-based knowledge of competition ❑ No baseline data to determine whether capital investment is high, average, or low ❑ Benefits of tourism are strong along the shorelines but lack impact inland (lack of balanced economic impact) ❑ Some evidence that residents feel tourism leads to increased housing prices ❑ Low rates of employee training ❑ No plan for broadly based tourism satisfaction surveys ❑ Limited opportunities for formal resident input regarding quality of life and tourism; quality of life and tourism development ❑ Some thresholds are being "pushed" (water/waste at Sauble Beach; water quality at Point Clark and Lake Rosalind; traffic at Sauble Beach, Tobermory, and Port Elgin) |

| Linking Current Performance to Future Planning | Strength | Weakness |
|---|--|--|
| | <ul style="list-style-type: none"> ❑ Strong potential for development of some nature-based products, presently undeveloped (e.g., rock climbing, outdoor painting and photography, river fishing, agi-tourism, wilderness camping/BPNP, trails,) ❑ Potential for “green”/eco-friendly tourism products and destination development (Blue Flag, Dark Skies, UNESCO designated biosphere reserve, success of e-terra) ❑ First Nations partnership potential ❑ Significant potential for development of culture and heritage tourism products | <ul style="list-style-type: none"> ❑ Uncertainty of effects of climate change ❑ Lack a co-ordinated, annual approach to planning and product development ❑ Lack of information sharing/availability of information, business-to-business ❑ Tourism industry not well connected with economic development and official planning (at community level) ❑ Perception that tourism is “politically-driven” |

6.7 Opportunities and Challenges

Just as the detailed data collection and analysis from the past and present tourism business and government experiences has revealed strengths and weaknesses, the literature surveys and industry studies assisted in identifying potential opportunities and challenges ahead for Bruce County.

Anticipatory context studies are also an important ongoing part of the system of annual planning cycles, continuing research and SWOT types of analysis, and the integrated partnership-based approach. Here are some immediate examples and applications.

□ Next Steps Process Opportunities

As outlined in 3.1.2 above, there were also serious gaps in the information available and therefore the process requires substantial additional research to fill out and fully realize the potential benefits of the PRTD process for Bruce County.

One example of this is the potential for Bruce in the Cultural Mapping component of the Municipal Cultural Planning approach to developing the municipal opportunities in culture as a key development sector. A thorough cultural mapping exercise in Bruce would fill in many of the gaps in the research on cultural tourism development potential in Bruce and substantially enlarge this tourism development database.

The Grey Bruce Cultural Network is moving to undertake a Community Cultural Planning project as a readiness exercise for full Municipal Cultural Planning by Grey and Bruce Counties and their lower tier municipalities, including the City of Owen Sound.⁷⁶

Similar process opportunities exist in programs directed to agri-tourism and rural development, the agri-culinary initiatives, the recommended “greening” programs, climate change, eco-tourism and others.

□ Next Step Product Development Opportunities

The PRTD audit of established and potential tourism development assets is at the core of this database resource created by the PRTD process. In the Audit, these assets are identified by their geographic significance or “reach”; that is their importance to wider and wider geographic communities or markets.

The ongoing research, as outlined above, will identify more potential tourism assets. In Phase II, additional examples were identified and illustrate both the potential of doing the cultural mapping to fill major gaps, and the product development opportunities for additional long haul tourism traffic generation

⁷⁶ www.gbcn.ca

for Bruce County. The David Milne sites and story to be interpreted in Paisley and the globally unique Park Head fossil beds are both cultural assets of national and international significance, and long haul attraction “reach”.

□ Next Step Partnership Development Opportunities

Following the cultural tourism examples above, both the Province of Ontario and the federal government have responsibilities, institutions and programs for cultural development support, as well as tourism development. Both Milne and the Fossil Beds could well attract significant federal and provincial involvement, investment and operations partnerships, given the national and international significance and potential touring audience for both sites and their interpretive developments.

There are similar opportunities for the County to partner regionally with other governments and area NGOs, as well as tourism industry groups and investors, in advancing and implementing many of the specific actions and key initiatives contained in this Process Report and the Strategic Plan Report. COMRIF, the Canada Ontario Municipal Rural Infrastructure Program fund includes both Tourism and Culture as eligible categories. Prince Edward County has done both PRTD and MCP studies and resultant Plans as part of a wider comprehensive economic development strategy.

Lowell Massachusetts is famous for its integrated planning and implementation of the culture and parks based comprehensive renewal process that exceeded all expectations and brought Lowell a new level of prosperity.⁷⁷ An integrated approach with interlinked Boards of Directors of all stakeholder organizations was a key strategy for success there. The opportunities for developing thematic and product specific partnerships to carry out these plans are clear and present now.

□ The Municipal Services and Carrying Capacity Challenge

Infrastructure has been identified, for the most part, as being able to sustain present and near-future visitation loads. There are some stresses (referenced elsewhere in this report) that include water and sewage at Sauble Beach and the Marl Lakes (Lake Rosalind); parking at Sauble Beach and Tobermory; and, high traffic loads during peak periods in Sauble Beach, Tobermory, Saugeen Shores (particularly Port Elgin). As a carrying capacity issue, the fragile sand dunes in any of the beach areas are candidates for serious damage without constant monitoring and visitor diversion tactics. This is also true for areas with rare orchids and ancient cedars.

Continual monitoring of infrastructure, services, and environmental impacts will require an investment commitment by Bruce County. With increased tourism comes issues of: increased garbage; water and waste (including

⁷⁷ www.lowellma.gov

stresses on inland lakes); increased traffic leading to road maintenance and upgrades; parking shortages; higher crime rates; social stresses of crowding and resident discontent; increased air pollution from vehicle traffic; general overuse of facilities built for lower capacities; and, similar concerns.

A study in 2003 indicated there were about 8,000 seasonal residences (many located on or near water, including islands).⁷⁸ Anecdotal evidence indicates that many of these become “permanent” homes as a result of seasonal tourists retiring to them. Monitoring will be necessary to determine the changes in the numbers of new seasonal dwellings being built and existing ones becoming permanent homes. Increases in both will create additional stresses, for example, on infrastructure, of water and waste, and garbage disposal. Impacts will not be limited to the immediate municipality but will include nearby towns and Owen Sound. As more cottages are built and as they become permanent homes, public access to the waterfront generally, and beaches specifically, will become an issue without strategic land planning ensuring access. Developing a number of forecasting models based on past and projected performance could be used to develop strategic responses based on various outcome scenarios.

Issues of infrastructure, social, and environmental stresses should be part of the proposed Tourism Research Strategy and Reporting Cycle (see Table 4, Section 3.4).

□ The Climate Change Challenge

Bruce County is in the immediate climate transition zone between southern and northern ecosystems, an area of unique, immediate climate change effects. For example, recent studies show that snowmobiling will disappear as viable winter activity in the foreseeable future as far north as Sudbury and definitely in Bruce County.

Ecological changes in all natural areas in this region will require human assistance since the rate of temperature change has been observed to be faster than adaptation rate of flora in particular: the nesting sites and food sources of many animal species. How does Bruce deal with changes in its long-time signature species and images in the Bruce tourism brand: orchids for example?

This radical ecological change may introduce a transitional era of much greater ecological sensitivity and greatly reduced carrying capacity in natural areas. Attention may shift from nature hikes to natural adaptation assistance projects and levels of interest may vary greatly.

Focus on greening and change could build added market opportunities for Bruce. With greening and eco-projects active here, Bruce could be an

⁷⁸ Kraemer. (2003).

outstanding site for seminars and conferences, education and research facilities and interpretive programs at the Bruce County Museum and Cultural Centre and related cultural cluster facilities.

Travel and tourism is a CO2 issue. Modes of transportation that minimize CO2 production can be encouraged wherever possible. A long-standing proposal for a long distance Peninsula Tour bicycle race in many stages is an example of an attraction opportunity in the spirit of the times.

□ The Challenge of Tourist Demographics and Ethnicity (Domestic)

An issue of Tourism, the Canadian Tourism Commission bi-monthly magazine, identified both youth (16-24 year-olds) and tweens (12-14 year-olds) as markets to watch, that are having and will have impacts on tourism.⁷⁹ The youth market is identified as the industry's "fastest growing sector". Three key findings from a 2002 Travel Activities and Motivation Survey (TAMS) study into the aging of Ontario's tourism market were:

- ➔ the primary inbound US market for Ontario (Great Lake states) will grow at a rate of about 9% compared to the US national average of 27%
- ➔ older people, aged 55 and over, will be a sizable market making up nearly 36%, currently accounting for 25%
- ➔ the portion of households with children in the Great Lakes states will decline from the current 3% to 29%

These changes will affect economic growth rates, with decreases of 34% and 51%. Specific age cohorts will affect economic growth rates as well: 18-34 year-olds by -106%; 35-44 year-olds by -250%; and, 45-55 year-olds by -86%. With these changes in demographics will come changes in activity participation rates. The report, too detailed to present here, indicates the need for regular industry research into changing visitor profiles and activity profiles for Bruce County.

During industry consultations, business owners reported anecdotal evidence of increasing numbers of domestic Asian travellers, especially in the peninsula area and Tobermory. Concerns were expressed about a lack of knowledge of how to serve an ethnically diverse tourism market and a gap between product offerings and traveller expectations. An example provided by an accommodations operator highlighted this gap: family groups of eight to ten people arrived expecting to use a room designed for two to four people. In addition, these groups expect to be able to prepare their own meals in their rooms. In some cases, language may be a barrier to properly communicating information needed by a ethnically diverse market.

⁷⁹ March-April 2007 issues.

The Bruce County tourism industry needs to act pro-actively to such changing markets, not reactively. As part of the training and education recommendation, bringing in consultants with expertise in understanding domestic Asian travellers could prove worthwhile. Sharing information through such consultations could be accomplished through an industry-owned, peer-to-peer Website and workshops or issue-specific local conferences.

□ The Health and Security Challenges

Tourism is part of the growing global travel that also results in rapid transmission of health threats such as SARS. SARS had a major impact on Ontario tourism, particularly in the GTA. These events have indirect spin-off effects over much wider geographic areas linked to the effected market. The Walkerton tragedy is another kind of example, here at home. Emergency services and medical services are being upgraded to deal with these. It is vital that the tourism dimension be fully considered and integrated in these measures.

As climate change progresses ever more rapidly, new southern diseases and pests will also migrate into Bruce. These too must be anticipated and new strategies and management plans developed to mitigate those, safeguarding visitors as well as residents.

Border security is a present problem that is having a measurable impact on tourism between Canada and the United States. Bruce County has about 50,000 seasonal residents, many of whom are also residents of the U.S.A. As American families make decisions about passing properties on to the next generation or selling the property in Bruce County, will Bruce's important role as an export tourism revenue earner diminish?

□ The DMO to DMMO Challenge

Much of the consultation feedback, if synthesised into one "grand recommendation", could be captured as a need for the collective tourism industry to consider moving from a destination marketing (DMO) organizational approach of doing business to one of a destination marketing *and management* (DMMO) organizational approach (see Table 35 for recommendations). Such an approach means thinking holistically and comprehensively about the destination, which is Bruce County, or as some feedback suggests, to a regional destination. A DMMO approach might mean reconfiguration so that tourism is a full partner at the economic development and planning tables. This approach would be a logical outcome of a number of present initiatives such as: 1) the regional tourism marketing partnership; 2) Grey Bruce joint "stamps" touring promotions; 3) food and agri-tourism initiative; 4) the Georgian Bay Coastal Route with 11 other DMOs; and, 5) the Grey Bruce Tourism map, started in 2006/2007.

A DMMO model would allow the building of organizational capacity to respond to the challenge of tourists for whom municipal boundaries are meaningless and for whom the experience is everything; pool collective knowledge and skills; pool resources for better ROI; sharing of data and development of appropriate performance measures and benchmarking methodologies; peer-to-peer knowledge networks, and, to adapt what is known as “master developer thinking” (MDT) that includes residents, visitors, and businesses, a more proactive approach. One DMO, as an example, uses the MDT approach as it tries to “touch visitors, engage them, tell them stories, manage visitors flows, and integrate everything with existing retail components”.⁸⁰

A greater collaborative and co-operative environment, developed through a move to a DMMO model, will enhance the ability of the industry to undertake the strategic plan. Such initiatives as going green, developing an industry-owned peer-to-peer Website, and developing county-wide training and education opportunities will be highly successful under a DMMO model. In fact, it may be required for success.

Such a move to a DMMO orientation will require political will and financial commitments, from all players, including chambers of commerce, tourism departments and associations, DIAs/BIAs, and municipal councils. As has been suggested elsewhere in this report, the model of integrated boards of directors used in Lowell Massachusetts could be used.

⁸⁰ See Gretzel, et al. (2006).

7. Conclusions: Process Results and Applications

7.1 A Living Process and Living Documents

This PRDT process has created a large database of tourism industry information not previously gathered in one place in this analytical format. As such it needs to be treated as living document and electronic files, which are updated regularly.

This Process Report and the completed Workbook and additional studies are key resources upon which the Bruce County tourism industry and the Bruce County Tourism office, Bruce County Planning and Bruce County Economic Development can build to their ongoing benefit. The framework to achieve this is the comprehensive ongoing research and planning process set out in the Strategic Plan Report.

7.2 Recommendations

The following recommendations (Table 38) have been developed directly from wide-ranging tourism industry and key stakeholder input, with the underlying themes and trends noted above. These recommendations are further refined into specific deliverables (Table 3, Strategic Plan Report) and draft timelines and priorities established (Table 4, Strategic Plan Report).

Table 37: Strategic Plan Recommendations

| |
|--|
| Recommendation 1 |
| Bruce County develops as an adaptable and competitive destination in harmony with its natural and cultural resources |
| Recommendation 2 |
| The Bruce County Tourism Community will plan and operate responsibly for environmental, social, and economic sustainability. |
| Recommendation 3 |
| Tourism in Bruce County will grow based on outdoor and indoor attractions and activities, complementing and expanding the numbers of experiences available and the tourism season. |
| Recommendation 4 |
| Community engagement and development is vital to authentic achievement of the Vision and requires educational programmes in service and regional tourism knowledge, plus an enthusiasm for the stories, including heritage, cultural, and natural, that uniquely identify our communities. |
| Recommendation 5 |
| Co-operation and enhanced communication, through the annual research, planning, monitoring, measuring, and evaluation cycle, lead to professionalizing and de-politicizing the management and marketing of tourism in Bruce County. |
| Recommendation 6 |
| The Bruce County Tourism Industry supports the importance of a regional marketing strategy that leads to increased numbers of visitors seeking niche experiences, that emphasises diversity, and keeps the brand promise of personal attention. A regional strategy is important but is subservient to the needs of Bruce County residents, businesses, and organizations. |
| Recommendation 7 |
| Bruce County will undertake a review of the brand that is "Bruce County" to ensure that product offerings and experiences are in harmony or consistent with the brand. |

7.3 Establishing Time Lines and Priorities

To establish draft time lines and priorities, several industry consultation inputs were used as references.⁸¹ First, focus group participants identified

⁸¹ Because of the consultation process, focus group and on-line survey inputs were collected prior to the development of recommendations and deliverables. Hence, the

their individual priorities by voting for specific initiatives or development ideas. Second, the initiatives and development ideas were submitted to broader industry input through an on-line survey. Finally, the project consultants have added their perspective assessed against estimated availability of resources (human, financial, time), ease of initiating development, perception of the importance of an idea/issue, and within the context of the overall strategic plan. The contents of this table were used to inform the time lines and priorities on Table 4, Strategic Plan Report.

Time lines and priority ratings are submitted as “draft” and should be reviewed by those tasked to implement the various recommendations and deliverables, to ensure they meet actual and changing resources and priorities.

7.4 The Process of Capitalizing on the Opportunities

The Strategic Plan Report sets out the annual next steps research, planning, monitoring, measuring and evaluation cycle that will fully develop the databases inaugurated by this PRTD process, and provide the living process for pursuing and refining the implementation strategies to create the partnerships and product development, performance gains and added futurity capacity to meet the Vision of Success for Bruce County established by this PRTD process.

7.5 Introduction to the 10-Year Strategic Plan – 2008 to 2017

Two key introductory sets of guiding principles, the Vision of Success and a Statement of Values introduce and set the standards for the three major operational components that follow.⁸² The vision of success is the “grand recommendation” of the strategic plan, the ultimate indicator of success. This is what the tourism industry in Bruce County strives to achieve. The themes of sustainability (environmental, financial, social), development of the shoulder seasons, expansion of tourism products to attract a broader tourist base (natural, heritage, cultural), are fundamental. The opportunities require more co-operation and inclusion of all communities in the planning and implementation of the next generation tourism development.

The operational dimension of the strategic plan has three major components. First, as stated, seven recommendations were developed from the wealth of

information in Table 2 is included in final rankings on the Gantt Chart (Table 4) but Table 2 does not include all of the deliverables in the Gantt Chart.

⁸² The vision of success and statement of values were developed with direct input from participants in the PRTD focus groups and interviews. They are important statements that announce to tourists, residents, and the tourism industry itself that “this is what we want to achieve” (vision of success) and “this is how we’ll achieve it” (statement of values).

consultative and research input⁸³. These recommendations are further distilled into a set of desired deliverables for each recommendation. Each deliverable is then broken down into a series of steps required for it to be achieved.

Second, deliverables are time-lined over a 10-year period setting out suggested times to start, continue, complete, and review each deliverable (Table 4, Strategic Plan Report). These time lines are “draft” as the various specific individuals, work groups, organizations, and departments that implement any of the recommendations (or specific deliverables within a recommendation) may need to make adjustments based on available resources (time, finances, and people/staff) and changing priorities.

Third, annual monitoring of the “health status” of Bruce County’s tourism industry will be important, as a method to monitor, not only successes in implementing the strategic plan, but changes (negative and positive) in the future context. To achieve this, a draft “monitoring strategy and reporting cycle” has been developed (Table 4). The statistics and indicators found in this PRTD Process Report will be used as “bench marks” of the state of the industry against which future years can be measured.⁸⁴ This monitoring and reporting strategy is, essentially, an “early warning system” of significant change.

⁸³ The term “research” is used to mean “any” methods used to gather information about how the tourism industry is doing. It includes focus groups, interviews, statistics, published and unpublished reports, and similar methodologies. The term is not used in the more restrictive sense of scientific/academic research.

⁸⁴ See the original workbook version and consultant’s workbook narrative in the PRTD process report.

8. Appendices

8.1 Appendix A - Bibliography

The bibliography identifies documents and Websites cited and referred throughout Phases I and II of the PRTD project. As identified elsewhere in the strategic plan document, research is a foundation of good decision-making and the wealth of reports and academic literature available will aid in the process. In some cases, these references can lead to identifying tools and techniques to aid decision-making (i.e., see Hunter and Shaw; Smith, 1996) and in others valuable information as case studies (i.e., Hardy, 2003; Auld and McArthur, 2003).

8.2 Appendix B – Transcription of Notes from the Focus Group

Appendix B is a transcription of the flip charts notes recorded at the Phase I focus group. The following topics were discussed:

Status Quo: In the first exercise, participants were asked, as a group, to develop a scenario of the future of tourism in Bruce County based on the status quo. In other words, what did the future look like if nothing was changed regarding the way all tourism-oriented interests (businesses, groups, organizations, and governments) were doing business.

Vision and Values: The second exercise asked participants to identify words and phrases that they felt should be included in VISION and VALUES statements. Vision was defined as the future of tourism in Bruce County. Values were defined as core beliefs, ethics, and philosophies to guide the way of doing business.

Core, On-theme, and Supporting Attractions: Participants were asked to agree or disagree with the list of attractions that had been defined as core, on-theme, and supporting attractions in Phase I. Specifically, did they agree with the list? Would they add anything or move anything from one list to the other? Were there any attractions missing completely?

Product and Futurity: The “wisdom of crowds” was the fourth exercise, done by sticking post-it notes on a matrix of flip-chart paper that formed a 10-year timeline. Working independently, participants identified attractions, experiences, and ideas for future tourism products and actions necessary to improve tourism in Bruce County. The second step of the exercise involved each participant using ten, coloured stick-on “dots” to vote for those attractions and actions they felt were the most important. The result was a timeline of actions for change and priorities.

Identifying Leadership for Change: Very simply, participants were asked to identify organizations and individuals that they felt should be responsible for taking the lead in implementing the Strategic Plan and Action Plan.

Beyond 2017: The sixth exercise allowed participants to identify what they believed would be indicators of success, indicators of achieving change and growth.

Barriers to Change and Growth: This was not part of the original focus group agenda, but, quite independently, participants identified what they believed were barriers to change or impediments to growth.

8.3 Appendix C – Transcription of Interview Notes

A series of interviews were undertaken shortly after the focus group. So that focus group and interview feedback could be merged, interviews were structured using the same questions as used during the focus group. The only exception was that the posting of ideas and issues on a 10-year timeline exercise was not done with interviewees.

Interview questions were not given to participants in advance so responses were “top-of-the-mind”. Notes were taken in point-form (no recordings) by the researcher although some notes are in fact “quotes” while others are paraphrased, keeping the intent of the answer. The interview process did allow for deviation from prescribed questions when a participant wanted to explore an idea further, the same for the interviewer. Most interviews were done in person with a few done via the telephone.

8.4 Appendix D - Summary of the Industry-wide On-line Survey

To gather tourism industry feedback about issues and ideas raised through the FG+I process, a short survey was developed and made available on the Internet through SurveyMonkey.com. The survey focused on four key areas:

- words and short phrases that could be used to create Vision and Values statements
- product developments and enhancements
- other ideas for improving the tourism in Bruce County
- identifying leadership and support for tourism initiatives

8.5 Appendix E – Resources Matrices

Two matrices were developed in Phase I. They reflect the findings of participants at two focus groups. An original Resources Matrix was compiled by the PRTD Team and presented at each of two focus group sessions, representing northern and southern county operators, for discussion and revision as deemed necessary. These matrices identify core, on-theme, supporting attractions as well as those that were deemed to be under-achieving and under performing. Market appeal (regional, provincial, national, and international) also was identified.

8.6 Appendix F – List of Participants

This appendix identifies all participants in Phases I and II but not those participating in surveys.

8.7 Appendix G - Core, On-theme & Supporting Attractions

Appendix H summarizes the core, on-theme, and supporting attractions as identified in Phase I. These were compiled by the PRTD Team and, except for one change, confirmed by participants at two focus groups. The change was to combine the Bruce Trail and Niagara Escarpment as one core attraction.

The core, on-theme, and supporting attractions should be used as indicators of linkages and not as absolute. Some on-theme and supporting attractions are quite limited and might only occur at one location (e.g., water trampolines at Sauble Beach only).

8.8 Appendix H - Selected Demographic and Economic Statistics for Bruce County and Ontario

This appendix includes demographic and economic indicators for Bruce County relative to Ontario taken from the last census (2006) and includes comparison to the 2001 census. The contents of the tables are self-explanatory and interpretation depends on the context (e.g., education levels relative to the tourism industry's need for training and education; age of the present labour force and identification of potential gaps of up-coming labour).

8.9 Appendix I - Demand Generators

Appendix I is an illustration of demand generators, their estimated appeal of "pull" value, and the potential tourism markets (i.e., local, mid and long haul provincial, long haul national, long haul US, and long haul overseas).

8.10 Appendix J - PRTD Workbook, Phase I, included on CD only

Appendix J is the original PRTD Workbook from Phase I. It is included in electronic form only, on the accompanying Final Report CD.

Appendix K - Developing Destinations by Improving Communication (Role and Function), included on the CD only

A consultative worksheet tool to aid a destination in assessing "who does what" regarding a variety of tourism activities, including DMOs, visitor centres, signage, product development, community awareness, motorcoach programs, sport tourism, meeting and conventions incentive travel, etc.