

November 2006



Durham Region's

PREMIER RANKED

Tourist Destination Project



Growing Together:
Building our tourism destination.



The Regional Municipality of Durham
Economic Development & Tourism Department

Durham Region Premier-ranked Tourist Destination Project Team 2005 - 2006

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INTRODUCTION

WHAT IS THE PREMIER-RANKED TOURIST DESTINATION FRAMEWORK?

Tourist Destinations are constantly trying to distinguish themselves in the marketplace, aspiring to achieve *premier* status and operate at the highest level within their reach.

In 2001 The Premier-ranked Tourist Destination Framework was developed by the Ontario Ministry of Tourism and Recreation. It was designed as a tool for destinations to inventory and analyze themselves in the tourism marketplace.

“Premier-ranked” focuses on enabling the destination to “be the best it can be”. The word “Premier” is typically defined to mean first in rank, position, importance, or quality. Being a Premier-ranked Tourist Destination is important because it says “here is a place more attractive than the rest”, a place the potential visitor should consider first in making travel plans.

The Premier-ranked workbook is a tool to measure the market status of the destination. It is a manual for working through a framework that:

- captures the attributes /factors/conditions considered necessary for a destination to be perceived as Premier-ranked
- identifies strengths and opportunities that might be used to create a sustainable competitive advantage
- provides a focus for building an expanded network of tourism stakeholders and consensus on future priorities for action

The Framework provides tools for destination areas to use in assessing their position in the marketplace. It is intended for use by destination areas rather than individual attractions, and is relevant to destinations of any size and with any degree of current market success. Fundamentally, it is designed to identify strategic targets a destination can aim for as it strives to improve performance in the tourism marketplace.

It is defined as a self-contained analytical process to be worked through. Although a commitment of time and energy is required, the investment is rewarded by insights and directions gained. A destination will have a very clear picture of its destinations status, the strengths and weakness supporting or constraining that status, and the direction that might be pursued to further improve market success. The destination should also enjoy a significantly expanded and more capable network of industry stakeholders, with a more cohesive focus on solving the challenges ahead.

In order for a destination to be considered a Premier-ranked Tourist Destination it must receive an exceptional rating in the product, performance and futurity dimensions. The Premier-ranked Tourist Destination Framework workbook has been designed to guide users through a three stage process of evaluation, interpretation, and planning. ***Ultimately, the final determination of rank is less important than the insights gained through the process, and the conversion of those insights***

into a plan for tourism development. As set out in the Premier-ranked Tourist Destination Framework workbook, the destination is evaluated using the following elements.

THE PREMIER-RANKED TOURIST DESTINATIONS FRAMEWORK:

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.

WHY DURHAM REGION

The PrTD process creates a clear appraisal of a destination's current competitive position in the tourism marketplace. There are a number of reasons why Durham Region invested the effort in the Premier-ranked Tourist Destination process.

- To provide a solid foundation for a tourism development strategy
- To demonstrate a solid understanding of what Durham has to offer and who the target market should be
- To establish a consensus on goals, objectives, priorities, and required actions to build the tourism sector
- To attract investment and ensure a common basis for identifying gaps and opportunities in the product mix
- To provide background data for the implementation of a brand development exercise
- To provide benchmarks that will allow measurement of the destination performance against a consistent yardstick

In 2002, Regional Council set out to create a clear vision for the future to allow Durham Region to effectively cope with expected changes to the population, economy and service provision. A Community Strategic Plan was developed that would allow the Region to maximize resources, enter into effective partnerships and

effectively communicate priorities to residents and businesses. Following extensive consultations with the community, Regional Council adopted the Community Strategic Plan in July 2003.

The Community Strategic Plan outlines 6 primary objectives necessary to fulfill Durham's vision of being a united group of vibrant and diverse communities recognized for their leadership, community spirit and exceptional quality of life. Each objective is supported by a series of strategic actions. Durham Tourism has the lead responsibility in two of these objectives and three strategic actions. The following chart list objectives, actions and desired results.

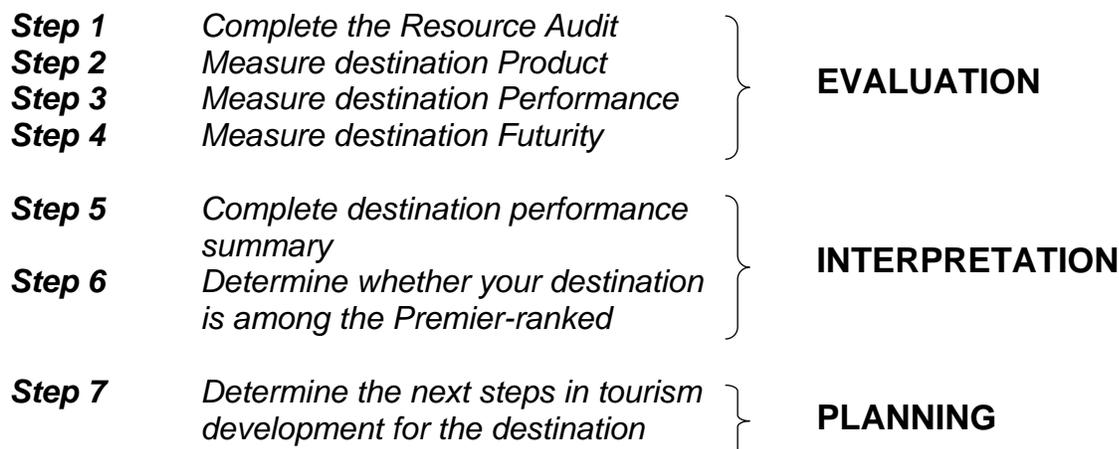
Figure 1.1 Durham Tourism Objectives, Actions and Desired Results

Objective	Actions	Desired Result
<p>Balanced Growth To ensure balanced growth and livable communities which are proud of their heritage, have thriving downtowns, appropriate services and a sustained urban-rural mix.</p>	<p>Action: Fostering greater preservation and appreciation of the Region's natural, built and cultural heritage. Action: Fostering the development of a vibrant artistic community.</p>	<ul style="list-style-type: none"> • To ensure an understanding and pride in the community's history and development. • To ensure the Region has a thriving artistic community.
<p>Economy To build the Region's economy and support the development of a highly diversified economic base and employment opportunities for those with advanced skills.</p>	<p>Action: Facilitating the development and coordinated marketing of the Region's tourism, arts, recreation and cultural facilities.</p>	<ul style="list-style-type: none"> • To ensure a reputation for quality products. • To ensure Durham is recognized as a 'tourist destination'. • To ensure increased value-added agricultural production. • To ensure passive recreation opportunities in natural areas.

Source: Durham Region Community Strategic Plan 2003

THE PROJECT PROCESS

The Premier-ranked Tourist Destination Framework is designed to guide a research team through a three stage process of evaluation, interpretation and planning. These stages and their respective steps are:



In the fall of 2005 Durham Tourism began the implementation of the Premier-ranked Tourist Destination Framework and in November of 2005, four market researchers were hired to create the PrTD team.

EVALUATION:

Step 1: Completing the Resource Audit

The Resource Audit, the foundation of the Framework, records the characteristics of the resources in the destination. The audit relies on four supporting tools:

- A Tourism Resource/Opportunities Matrix
- A Transportation Resource Checklist
- A Travel Trade Resource Checklist
- Core and Sector Surveys

The Resource Audit provides a valuable foundation for the PrTD Framework and is a critical part of the project. A high level of effort and considerable time was invested to complete this portion of the process.

The PrTD team began by creating an extensive tourism database using:

- Durham Region – Your Local Marketplace On-Line Business Directory data
- Durham Tourism Website Database
- Tourism brochures and other printed material

Additional information was obtained to ensure existing data was correct and up to date through:

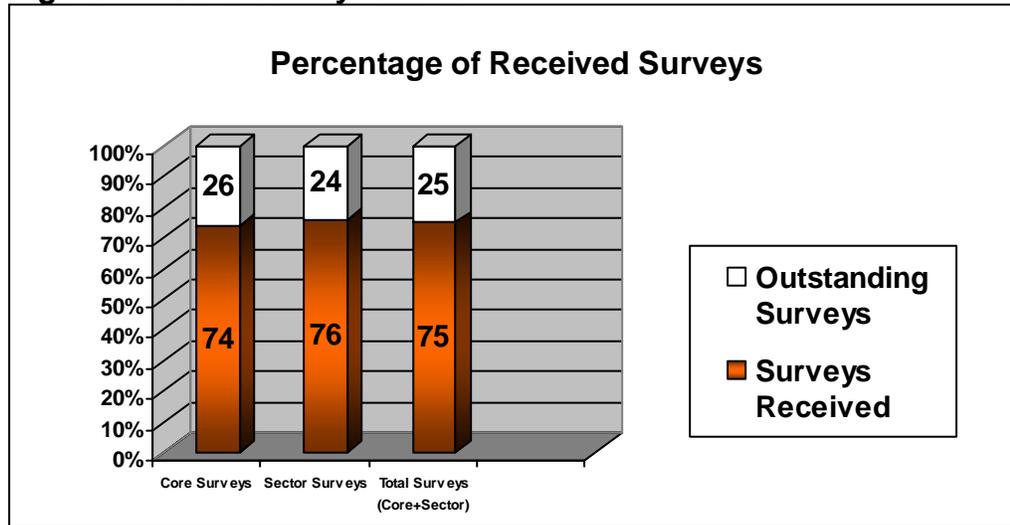
- Verifying data with sector specific associations and organizations
- Canada 411
- Yellow Pages
- Town and Municipality sites
- Phone calls to businesses and web services to verify addresses and update information

The result was a database of 1400 entries, which was sent to the Steering and Industry Committees for consideration and recommendations. A total of 876 tourism businesses were identified. Core surveys and appropriate sector specific surveys were sent out in January 2006. Given that 60 businesses were closed and 236 businesses felt that they had no tourism impact, the true Survey Quantity was 580 core surveys and 623 sector surveys. By the close of the survey phase of the resource audit, 431 core surveys and 467 sector surveys were returned resulting in a 75% return rate.

The Resource Audit included a core survey with standard information about tourism businesses. In addition, there are surveys that specifically address each tourism business sector (i.e. attractions, festivals, adventure providers, dining, etc.). Each business participating in the audit completed a core survey together with the sector specific survey(s) that applied. *Figure 1.2:* shows the percentage of surveys that

were sent out and the percentage returned. (Also see Appendix 1.0 for complete details).

Figure 1.2 Core survey results



Source: Durham Region PrTD Resource Audit, May 2006

Figure 1.3: shows total sector distributed, number and percentage of surveys returned.

Figure 1.3 Sector Survey results

Sector Surveys	Total Sent	Total Received	Percentage Returned
Accommodations Survey	89	75	84 %
Adventure Providers Survey	17	5	29%
Attractions Survey	73	70	96 %
Festivals Survey	69	68	98.5 %
Food Survey	125	55	44 %
Golf Survey	46	32	73 %
Marinas Survey	9	8	89 %
Parks & Trails Survey	26	26	100 %
Retail Survey	162	133	82 %
Skiing Survey	4	2	50 %
Wineries Survey	3	3	100 %
Core Survey	580	431	74%

Source: Durham Region PrTD Resource Audit, May 2006

The data collected from the Resource Audit was entered into the PrTD database and into an Excel Workbook for analysis.

The accumulation of information in the database and the results from the surveys returned formed the basis for completing the PrTD Workbook and the Resource Opportunity Matrix, identifying Core and Supporting Attractions, and determining the current market.

The Tourism Resource / Opportunity Matrix

Completing the Tourism Resource/Opportunity Matrix involved compiling the full range of the destinations tourism resource base and its utilization, counting and categorizing the resource opportunities for each asset type and identifying core attractions, supporting attractions, on theme activities and underdeveloped assets. Assets that participated in group travel and packaged experiences as well as the existing, potential, and desired markets were all identified.

The Matrix is used in several ways:

- as a tool to guide consideration of the tourist destination area's asset base, the resources contributing to its current market penetration, and ultimately the geographic markets from which it is reasonable to expect future visitation to occur
- as an aid to identify product gaps and opportunities for future development
- as a summary reporting form

Transportation Checklist

The Transportation Resources Checklist (see Appendix 2.0) was completed. Information necessary to complete the checklist was drawn from knowledge or perceptions held in common by area stakeholders in tourism, committee and industry sessions, and through direct contact with attractions, taxi and transit service providers.

Travel Trade Resources Checklist

Information was compiled to complete the Travel Trade Resource Checklist (see Appendix 2.0) from consultation with area attractions, tour operators and travel agents. Trade association directories helped to identify the relevant operators and agents required to complete the checklist. Additional information was collected by contacting operators and agents to discuss matters raised by the checklist. A travel trade operator also participated on the steering committee.

Step 2, 3 & 4: Evaluation of the "Product, Performance and Futurity" Dimensions

Steps 2, 3 and 4 lead through an evaluation of destination performance against the PrTD Framework, assessed by a series of measures specific to the Product, Performance and Futurity dimensions.

Each measure is generally in two parts, as shown below in the reproduction of measure A1.ii from page 17 of the workbook. The first part of the measure is in the form of a statement, with an implicit question asking whether the statement can be affirmed as "true", "somewhat true", or "not true yet" for the destination. Each statement is answered with a "Yes", "Partial" ("P") or "No". The second part asks for the facts that substantiate the answer provided. Responses are transferred to the Performance Summary (see Appendix 3.0).

A1. ii. The Audit distinguishes between core and supporting attractions The core attractions are:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Yes	P	No

The results of the resource audit, an extensive library of documents, further in-depth research, and interviews with regional and municipal authorities formed the basis for answering the 118 measures. These measures have been incorporated into this report and form the basis of the evaluation.

INTERPRETATION:

Step 5: Completing the Destination Performance Summary

The PrTD Framework asked that the Performance Summary be completed using the following symbols to record the answers to each measure:

- Yes
- ◐ Partial
- No

When all the criterion had been assigned their appropriate symbol an assessment was made to determine the symbol to be used for each element. The assignment of affirmations given at the element level provided the basis for a judgment that was required to make the appropriate response for each of the dimensions Product, Performance and Futurity.

Ultimately, performance on the dimension level is weighted by the extent to which the destination can affirm that it fulfills the expectations laid out by the measures.

DIMENSION	→ PRODUCT		
Element	→ A. Distinctive Core Attractions		
Criteria	A1	A2	
Measures	A1.i	A2.i	
	A1.ii	A2.ii	
	A1.iii	A2.iii	
	A1.iv	A2.iv	
	A1.v	A2.v	
Element	→ B. Quality and Critical Mass		
Criteria	B1	B4	B6
Measures	B1.i	B6.i	B6.ii
	B1.ii	B6.ii	B6.ii
	B1.ii	B6.ii	B6.ii
	B1.iv	B6.iv	B6.iv
Criteria	B2	B3	B7
Measures	B2.i	B3.i	B7.i
	B2.ii	B3.ii	B7.ii

The resulting summary sheet is a clear and easy to use reference. (For the completed Performance Summary see Appendix 3.0)

Step 6: Determine whether your destination is among the Premier-ranked

The determination of whether the destination is premier-ranked is straight forward. Achieving that status requires:

- a yes in response for the Product dimension,
- a yes in response for the Performance dimension, and
- a yes in response for the Futurity dimension.

With this foundation, identifying potential responses to the destination's weaknesses is possible; creating suggestions/options for future tourism development. These suggestions reflect only a portion of what must be addressed by a tourism

development strategy. A destination's strengths, market trends and opportunities and the competitive context must also be considered and integrated into that strategy.

The services of a consulting firm, ^{the} Tourism Company, were retained and Jill Vandal joined Durham Region's Premier-ranked project in May 2006 as a knowledgeable and objective facilitator familiar with the PrTD process, to guide and articulate the summary of results and facilitate the development of the a tourism development strategy.

Initial conclusions were shared with ^{the} Tourism Company who in turn facilitated a meeting with the steering committee to review and apply the three dimensions, Product, Performance and Futurity as outlined in the workbook. The summary draft from this meeting formed the basis for a review by the broader tourism industry. Two meetings were held with 34 industry partners in attendance, resulting in a confirmation and detailed understanding of the preliminary findings. The summary of these meetings formed the basis for creating strategic priorities and emerging strategic actions and responses.

PLANNING:

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

A visual scan of the completed performance summary will quickly identify concentrations of strengths and weaknesses in the destination's product, performance and futurity allowing a linkage of current performance to future planning.

The Steering Committee, Industry Committee and industry partners prioritized needs and developed strategies. A meeting to review and finalize the recommendations was held in September 2006. Draft reports were created and presented to the Steering Committee and changes were incorporated into the final report.

DURHAM REGION COMMUNITY PROFILE

Durham Region is one of the fastest growing communities in Canada. Durham is comprised of eight municipalities that serve as the eastern gateway to the Greater Toronto Area including the Town of Ajax, Township of Brock, Municipality of Clarington, City of Oshawa, City of Pickering, Township of Scugog, Township of Uxbridge and Town of Whitby.

Total Population:	506,901 (2001)
Population Growth Rate:	From 1996 – 2001, population increased 10.5%
Languages:	English – 87%, French – 2%, Other – 11% <i>(Mother Tongue - the first language learned and still understood)</i>
Age Structure:	0-14 years: 115,565 or 22.8% 15 – 24 years: 66,370 or 13.1% 25-64 years: 275,300 or 54.3% 65 years and over: 49,665 or 9.8%
Income:	Average household income: \$75,058
Dwellings:	Total occupancy - 171,725 <i>This represents an increase of 133% since 1976.</i>
Education:	<i>Of population 20 years and older</i> Less than high school – 5% High school - 35% Trade Certificate - 11% Completed University / College – 49%

Source: *Durham Region Profile – Demographics & Socio – Economic Data, Planning Department 2006.*

Land Area: 2,590 square kilometres (1,000 square miles)

Transportation: Highways 401, 407, 7, 2 and 12; Pearson International; Airport; Oshawa Airport; area harbours

Education/Training: University of Ontario Institute of Technology; Durham College

TOURISM PROFILE

What does tourism in Durham Region look like now?

Total # of visits: 3.03 million

Total spending: \$208 million generating over \$4.5 million in Municipal tax revenue, \$73,737,000 in labour income and 2558 full and part-time jobs

Same day vs. Overnight:
71% same day; 29% overnight

Origin: same day visits 98% from within Ontario; overnight: within Ontario (83%), 9% U.S., 4% other provinces and 4% overseas

Travel Party Profile: 90% 2 adults, average age: 41 yrs.

Market segments: Visiting Friends and Relatives (VFR) 71%, Pleasure: 19%, Business 7.3% and Other 2.1%

Seasonality: 36% July to September, 21% per quarter for the remainder of the year.

Source: CTS/ITS 2004

PRODUCT EVALUATION – Rating: *PARTIAL* (D)

The product dimension of the PrTD Tourist Destination Framework is designed to identify and assess the features that enable a destination to offer a high quality tourist experience.

ELEMENT A: DISTINCTIVE CORE & SUPPORTING ATTRACTIONS Rating: *PARTIAL*

Distinctive Core Attractions criteria and measures assess:

- what it is about the destination that makes it stand out as distinct in the marketplace
- how the destination’s attractions are distinguished
- how the destination offering is relevant to the market wants

A1. The destination offers distinctive core attractions which are linked to its physical setting and / or history. **Partial**

Measure	Rating
i. A Resource Audit has been completed	Yes
ii. The Audit distinguishes between core and supporting attractions	Yes
iii. The core attractions motivate tourist travel to the destination	Partial
They do so:	
<input checked="" type="checkbox"/> On their own <input checked="" type="checkbox"/> As part of a regional complex	
iv. Opportunities to build on complementary tourism attractions/activities have been assessed	Partial
v. The core attractions are linked to the physical setting of the destination	Partial
vi. The core attraction are linked to the history of the destination	Partial
vii. Other Ontario destinations with competitive or similar offerings have been identified	Yes
viii. The destination is considered to stand out as distinct from its competition	No
ix. The destination’s offering is superior because it offers a better guest experience	No
x. The destination has a product positioning statement	Partial

A2. Attractions are relevant to the expectations of the identified market segments.

Partial

Measure	Rating
i. The Resource Audit classifies destination resources and their appeal to Regional, Provincial, National, U.S. and International geographic market segments	Yes
ii. Core attractions are relevant to a tourist market base	Partial
This base is considered to be a:	
<input checked="" type="checkbox"/> Mass market	<input checked="" type="checkbox"/> Special interest market
iii. Attractions appeal to guests from beyond Ontario's borders	No
iv. The market segments for whom the identified attractions are expected to have a compelling appeal have been identified	Yes
v. A core attraction, or set of complementary attractions pull visitation from all segments on a year-round basis	Partial

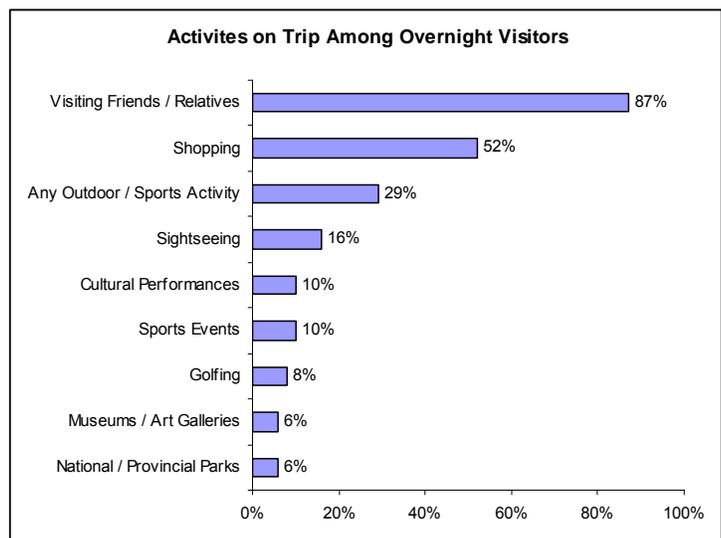
DISTINGUISHING CORE AND SUPPORTING ATTRACTIONS

The Resource Audit provided a great deal of information relevant to assessing the Region's core and supporting attractions. In addition to data collected, there are various factors that need to be considered when determining core and supporting attractions.

Core attractions are measured by:

1. number of annual visitors
2. ability to attract and appeal to visitors from outside the local area
3. link to physical setting or landscape
4. link to history of destination
5. critical acclaim

It is difficult to assess if core attractions motivate tourist travel to the destination on their own. Some with specialty appeal do but most work as part of a regional complex usually bounded within a local municipal area or by type of experience sought.



Source: Statistics Canada, Canadian and International Travel Survey, 2004

CORE ATTRACTIONS

Figure 2.1: highlights characteristics of Durham’s core attractions that appeal to the overnight and day trip markets.

Figure 2.1 Durham’s core attractions for overnight and day trip markets

	Attract / appeal factor	Physical link	Historic link
OVERNIGHT VISITS			
Mosport International Raceway	SI	○	●
Sports Venues / Events	SI	○	●
Business / Education Facilities	SI	○	○
Local Residents	M	○	○
DAY TRIP VISITS			
Downtown Port Perry	M	●	●
Outdoor product cluster	SI	●	○
Agriculture/Garden product	M & SI	●	●
Cultural Attractions	M	○	●
Festivals & Events	M & SI	○	●
Zoos	M	○	●
Casino/Gaming	M	○	●

Source: Durham Region PrTD Resource Audit, May 2006

Legend:

● - Yes	M - Mass
○ - No	SI – Special Interest

DURHAM’S UNIQUE ATTRACTIONS

The Region lacks an iconic natural feature to serve as a core attraction with appeal to a mass market. There are a number of ‘first’ or ‘only’ attractions that appeal and attract specialty markets from outside the local area. *Figure 2.2:* lists Durham’s unique attractions and their features.

Figure 2.2 Durham’s unique attractions and their features

Mosport International Raceway	<ul style="list-style-type: none"> ▪ One of only 3 tracks in the world to have hosted Formula1, Can-Am and Indy car events ▪ 4 km road course, 2.4 km driver development centre with skid pad, 1.4 km kart circuit, ½ mile paved oval ▪ Host of Canada’s stock car championship
Wooden Sticks Golf	<ul style="list-style-type: none"> ▪ Tribute to famous golf holes of the world with 12 of 18 holes inspired by famous PGA Tour holes ▪ Home to Ontario’s Golf Museum ▪ On-site cabin accommodations
University of Ontario Institute of Technology	<ul style="list-style-type: none"> ▪ Ontario’s first laptop based university ▪ State of the art tennis facility, 2 NHL size ice pads, international standard playing fields for baseball, football and soccer ▪ Campus heated and cooled using an innovative borehole thermal energy storage system ▪ Automotive Centre of Excellence
Parkwood, The R.S. McLaughlin Estate	<ul style="list-style-type: none"> ▪ Former home of the founder of General Motors of Canada, Col. Robert S. McLaughlin (Sam) ▪ National Historic Site and considered one of Canada’s last grand castles ▪ Built between 1917 – 1919, the home remains ‘as it was lived in’ with original furnishing and décor

Source: Durham Region PrTD Resource Audit, May 2006

CORE ATTRACTIONS FOR OVERNIGHT VISITS

A core attraction is the main reason or the ‘lure’ that prompts someone to visit an area. It may be one major feature or a cluster of features that, when combined, motivate a visit. The core attraction may be, for example, an internationally renowned landscape or built attraction, a locally significant cultural festival or a regional centre for a specific outdoor activity. Other terms used to describe a core attraction include “core experience” and “demand generator.”

Mosport International Raceway

Mosport International Raceway attracts a specialty audience of motor sport enthusiasts. This track opened in 1961 and is the largest of its type in Ontario. Mosport is one of only 3 tracks in the world to have hosted Formula 1, Can-Am and Indy Car events. The 750-acre, multi-purpose facility boasts a 4 km road course, a 2.4 km driver development centre with skid pad, a 1.4 km kart circuit and a half-mile paved oval track. The four circuits play host to more than 400 events and close to 250,000 racing enthusiasts annually.

Market Segments

- adult couples
- racing enthusiasts

On-Theme Activities

- camping on-site
- skill development (eg. driver training program)
- festivals and events

Purchase opportunities

- on-site
- via the internet
- toll free number
- third parties in Region

Visitation

- Regional, Provincial & U.S. /Int’l

Annual events held at Mosport International Raceway include: the American GT Series, Spec Miata Endurance Championship, Canadian Superbikes-600 (Pro & Am) race, Suzuki SV650, 125 & 250 Grand Prix, Canadian Thunder Series, American Le Mans Series, Po Am Series, SPEED World Challenge GT and Touring Series GT3 Cup, F1200 & Cup Lite, CASCAR Super Series and CASCAR/Mosport Speedway 200 (on the oval). Mosport is open from April to October. The average length of stay is two days.

Sports Venues / Events

There are a large number of sport facilities in the Region that host sports events and tournaments throughout the year. By their very nature, most of these sporting events require an overnight stay. *Figure 2.3:* shows examples of the variety of sport facilities in Durham.

Figure 2.3 Examples of sport facilities in Durham

Facility	Amenities
<p>Iroquois Park Sport Complex, Whitby – this is the largest municipal recreation complex in Ontario, with over two million visitors each year.</p> <p>Expansion: 72,000 square foot Abilities Centre. Variety Village type facility for sport, entertainment, education and training (scheduled to open March 2008)</p>	<ul style="list-style-type: none"> ▪ 6 ice pads ▪ 2 swimming pools ▪ 5 tournament diamonds ▪ 6 lighted tennis courts ▪ skateboard park ▪ soccer pitch ▪ swimming ▪ sport training ▪ fitness centre ▪ rock climbing ▪ gymnasium
<p>The Legends Centre, Oshawa</p>	<ul style="list-style-type: none"> ▪ 200,000 square foot facility ▪ 4 NHL size ice pads ▪ 5 activity rooms ▪ 3-25 metre lane pools ▪ gymnasium
<p>General Motors Centre, Oshawa – opened in November 2006, it will regularly host a variety of sports and entertainment events.</p>	<ul style="list-style-type: none"> ▪ spectator capacity of 5,400 for ice events and 6,400 for concerts in main bowl ▪ seating for 200 at secondary pad ▪ 23 private suites, corporate boxes, club seating ▪ a restaurant/bar with street access ▪ Oshawa Sports Hall of Fame ▪ an outdoor plaza for programmed events and activities (converts to an outdoor ice rink in winter)

The South Courtice Arena , Clarington	<ul style="list-style-type: none"> ▪ 1 NHL size ice pad ▪ 1 Olympic size ice pad ▪ 25 metre/6 lane leisure pool ▪ program rooms
The Scugog Recreation Complex , Port Perry	<ul style="list-style-type: none"> ▪ 2 ice pads ▪ 4 full size beach volleyball courts ▪ 3 premier ball diamonds ▪ 8 youth soccer pitches ▪ meeting rooms ▪ skateboard park
Ajax Community Centre , Ajax	<ul style="list-style-type: none"> ▪ 1 Olympic size ice pad ▪ 3 North American size ice pad ▪ community meeting rooms ▪ 25 metre indoor pool ▪ 4 tennis courts ▪ 5 international squash courts ▪ Indoor rock climbing ▪ skateboard park
Civic Auditorium Complex , Oshawa	<ul style="list-style-type: none"> ▪ NHL size hockey arena ▪ a 5 lane 25 metre pool ▪ a football/soccer stadium seats 2000 spectators ▪ 3 additional football/soccer fields ▪ 225 metre indoor track ▪ 4 indoor tennis courts ▪ 2 international squash courts ▪ 2 badminton courts ▪ program rooms
<p>Durham College/UOIT Sports Complex (Campus Ice Centre and Sport Fields). A joint venture between the City of Oshawa and UOIT to serve the community and students.</p> <p>Note: A feasibility study is currently underway to determine the need for a swimming pool.</p>	<ul style="list-style-type: none"> ▪ 2 NHL size ice-pads ▪ international size baseball diamonds ▪ regulation size football and soccer fields ▪ tennis facilities ▪ lounge with kitchen and serving area ▪ multipurpose room

Source: Durham Region PrTD Resource Audit, May 2006

Oshawa Generals

The Oshawa Generals are the only junior ice hockey team in the Ontario Hockey League (OHL) playing in Durham Region. The team is named for General Motors of Canada, an early sponsor of the team which has its headquarters in Oshawa. The Generals are one of the most storied franchises, and the most successful in Canadian Hockey League history. As they move from the Civic Auditorium to their new home, the General Motors Centre, in November 2006, there is a potential for the Generals to become a demand generator for OHL hockey spectators and sports lovers in general. The tourism benefits of this new facility to attracting tournaments are evident in the Oshawa Generals bid to host the 2008 Memorial Cup, the

championship trophy of the Canadian Hockey League (CHL). Junior Men's (under the age of 21) ice hockey teams from across Canada will compete.

Business / Education Facilities

On a year-round basis, local businesses attract visitors in the form of business travelers who stay for an average of two days. Many of these guests are visiting from national and international locations.

There is a 19,000 square foot conference facility scheduled to open in Ajax in 2007, as part of the second phase of the Hilton Garden Inn development. The Hilton Garden Inn facility, together with new sports and entertainment facilities, will complement existing meeting facilities and provide greater opportunities for Durham to attract the meetings, conferences and event market segments.

The Jubilee Pavilion at Lakeview Park in Oshawa was recently restored to reflect the elegance and ambience of an era gone by including the restoration of the historical dance floor. This facility can host up to 1000 guests.

Conference facilities are available at UOIT and Durham College. The facilities are 80% booked through summer (2006)¹. Rooms and suites in the Simcoe Village and South Village, residences that accommodate over 1,300 students, are used for conference delegates in the off season. International delegates are attending conferences in Durham Region. Examples of recent conferences include:

- the Provincial Genealogy Conference (500 guests) in May 2006;
- the International Green Conference in July 2006; and
- the Mormon Church Youth convention in 2005 - more than 1000 visitors attended from over fifty countries.

The University also boasts a state-of-the-art tennis facility, 2 NHL size ice-pads and international standard size playing fields for baseball, football and soccer².

Over 3,500 students are enrolled at the University Of Ontario Institute Of Technology for the 2005-2006 academic years. Enrolment is expected to rise to 6,500 students by 2010. International students make up more than five per cent of the University's student body, coming from over 30 countries.

Local Residents

Statistics Canada indicates that in 2004 of the 887,768 overnight visitors to Durham, 633,941 or 71% cited the main reason or 'lure' for coming to Durham was their friends and relatives. Durham's residents are a main reason or lure prompting visits to the area.

¹ www.campusconferencecentre.ca

² University of Ontario Institute of Technology www.uoit.ca

DAY TRIP CORE ATTRACTIONS

Durham's day-trip core attractions provide visitors an authentic and unique experience and in some case offer visitors an opportunity to "get out and try" entertainment, cultural and artistic pursuits for the first time. In addition, core attractions to the day-trip market are also supporting attractions to the overnight market as you will see outlined in this report.

Port Perry

The unique features that made this village an attractive place for visitors more than 100 years ago still attract thousands of people every year to experience the quaint charm of the community.

Port Perry is steeped in history. A fire in June of 1884 devastated 35 buildings on Queen Street. By the fall of 1884 the commercial core of Port Perry had been completely rebuilt with red and yellow brick buildings. These buildings have remained largely unchanged for almost 120 years with the ornate brickwork, decorative trims and large windows still intact.

One of the amenities that make Port Perry unique is the waterfront of Lake Scugog. Originally a place of industry, the shore was lined with lumber mills and a railway. The only remaining evidence of industry is the old grain elevator at the east end of Queen Street, built in 1875.

The waterfront (Palmer Park) is the perfect setting for special events and concerts. The park is busy all summer with picnics, concerts, a marina and fishermen. Lake Scugog provides a home to Scugog Island Cruises whose passenger vessel, The Woodman, docks at Palmer Park.

Additional features of Downtown Port Perry are the Victorian style homes built in the 1870's and 1880's and the Town Hall 1873 - now a performing arts theatre. Walking tours are available for self guided tours of the town and guided tours by the local historian are also available.

There are over 300 merchants in downtown Port Perry. Some examples of the unique offerings include:

- The Nutty Chocolatier, a little chocolate shop that takes you back into time, specializing in homemade fudge, truffles, Belgian chocolates, ice creams and frozen yogurts.
- Brocks a fifth generation retail legacy known for quality merchandise at a great value.
- The Settlement House Shops is widely known as the store for home decor and home furnishing inspiration. The Settlement House was chosen "Retailer of the Year 2002".
- Paula Lishman and her award winning soft knit beaver garments and accessories.

Over the years, downtown Port Perry has been host to dozens of Hollywood and Canadian film and television productions, including, *Fly Away Home*, *The West Wing* and the comedy, *Welcome to Mooseport*.

Gaming

The Great Blue Heron Charity Casino attracts 1 million visitors each year. It is designed to reflect an earthy Native American theme. The casino currently operates year-round, 24 hours a day, 7 days a week. It offers 60 gaming tables, 535 slot machines, an all-you-can-eat buffet and a lounge. The casino appeals to a mass market with visitors staying an average of 2-3 hours.

Ajax Slots opened during the Resource Audit and therefore a survey was not completed.

Horse racing at Picov Downs operates May to September and visitors stay 3-5 hours.

Market Segments

- adults
- seniors
- gaming enthusiasts

On-Theme Activities

- horse racing
- dining

Purchase opportunities

- on-site
- tour operators

Visitation

- Regional, Provincial, U.S. / Int'l

Zoos

There are 4 zoos in Durham Region. Although smaller in size than the nearby Toronto Zoo, the benefits of visiting local zoos include:

- the visitor is close enough to see all the animals
- there are a wide variety of animals
- visitors can observe feeding
- there are opportunities to interact with the animals

Local zoos appeal to a mass market. 165,000 people visit Durham's zoos annually. One zoo is open year-round the rest are open May to October. The average length of stay is 2-5 hours.

- Bowmanville Zoological Park has been in existence since 1919 offering a family experience, an educational show and accessibility to seniors and the physically challenged. The zoo has been featured in the *Globe and Mail* and has been awarded the "Thomas Baines Award of Excellence". It is home to; Baghera, the magnificent black tiger from Peter Benchley's "Amazon", a bevy of camels from "The Thirteenth Warrior" starring Antonio Banderas, Caesar the lion from "The Ghost and The Darkness" and Billy, the white Bengal tiger from the TV series "Animorphs". Bowmanville Zoo is an accredited member of the Canadian Association of Zoos and Aquariums (CAZA).

Market Segments

- adults
- families with children
- seniors

On-Theme Activities

- animal rides (elephant)
- animal shows
- children camps
- accommodation
- animal training
- petting animals
- celebrity animals

Purchase opportunities

- on-site
- on-line

Visitation

- Regional, Provincial & U.S. / Int'l

- Northwood Exotic Animal Ranch, located in Scugog, offers the greatest selection of cats in Canada and offers visitors opportunities to play with baby animals. The animals from Northwood have been featured in films such as Grizzly Falls, Road to Avonlea and Young Blood Hawk; on TV programs including Zoboombafoo, Discovery Channel, Canadian Heritage and Mutant X; and in commercials for Tim Horton's, Miracle Whip, Nissan and Ford. They are fully licensed by the Ontario Ministry of Natural Resources.
- Jungle Cat World offers children's camp, educational programs, and an accommodation experience with a safari theme. It has been accredited 5 times by the Canadian Association of Zoos and Aquariums (CAZA).
- Located on the Oak Ridges Moraine the Oshawa Zoo features 45 species of tame exotic and domestic animals in an interactive environment, setting out to exceed national zoo standards.

Outdoor Product Cluster

Durham has an expansive and diverse collection of outdoor activities. As this attraction is a cluster of many activities that appeal to a mass and special interest market, it provides a year-round draw. Golfing, camping and ice /sport fishing draw from outside the Region. Market segments are touring families, outdoor enthusiasts, campers, skiers, fisherman, water sport enthusiasts, and adventurers. The purchase of outdoor experiences can be made on-site, through the internet and toll free numbers.

There are 13 beaches, 60 trails, more than 30 conservation areas, over a dozen sizable campgrounds, and 5 wildlife reserves or areas suitable for watching wildlife.

Durham's outdoor product includes:

Golf:

There are more than 45 golf courses, offering a variety of levels of play and price ranges from beginner to world class. Golf has a great number of on-theme activities, including driving ranges, golf training, golf events, a golf museum, accommodations and dining.

A few of Durham's golf courses that attract visitors from outside the Region include:

Wooden Sticks

- Ranked one of the top 100 golf courses in Canada 2006 by SCORE Golf Magazine
- 12 out of 18 holes were inspired by famous golf holes from the PGA Tour
- Home to the Ontario Golf Museum
- Cabin accommodations are available on-site and packages have been created

Royal Ashburn:

- Ranked in the Top 50 Courses in Canada 2004 and 2005
- Hosts the qualifying school for the CGA every fall

Deer Creek:

- Awarded “Best Teaching Facility Award” and “Best Practice Facility” by The Toronto Sun
- Each year hosts one of the Canadian Junior Golf Association tournaments

Trails:

The Region of Durham boasts over 1,200 km of trails offering opportunities in horseback riding, cross country skiing, biking, hiking, snowmobiling, rollerblading, riding ATVs and riding motocross.

The Durham Trail Coordinating Committee (DTCC) developed a proposal for a Regional trail network to enhance, expand and promote a public Regional trail system connecting the Region of Durham municipalities, the Oak Ridges Marine, Lake Ontario, Lake Scugog and Lake Simcoe (See Appendix 4.0 for a Map of Proposed Trails).

Skiing:

There are four ski hills located within Durham Region that are open December through March with varied hours of operation.

- Lakeridge Ski Resort operates 19 runs, 7 lifts on 70 acres of land
- Oshawa Ski Kirby Club operates 21 runs, 11 lifts on 60 acres of land
- Dagmar Ski Resort located in the Oak Ridges Moraine, offers alpine skiing, snowboarding, cross-country with 4 lifts, 2 Magic Carpets, and lesson packages
- Skyloft Ski and Country Club has 18 runs and trails, one quad chair, Sky Carpet Beginner Lift, a ski school, lessons, childcare and programs for kids

Fishing and Boating:

Fishing is a year-round opportunity in Durham. There are 13 sport fishing companies and 7 ice fishing outfitters. Ice fishing is available on Lake Scugog and Lake Simcoe. Fishing can also be enjoyed off the banks of many rivers and streams.

Good opportunities exist for salmon, trout, muskie, walleye, pike, or bass in Durham. There is access for launching boats and boat rentals are available throughout the Region. Canoeing and sailing are also popular in Durham.

Agriculture / Garden Product

Regional visitors and those visiting from the GTA frequent farms, orchards, farm markets and farmers markets, predominantly during the growing season (May to October). U-pick operations offer apples, blueberries, strawberries, raspberries, fresh vegetables, pumpkins and, in the winter months, ‘cut your own’ Christmas trees.

The cluster that makes up the agriculture attraction appeals to a mass market. The market segments are touring families, adults and seniors who stay for one day on average. The Region’s apple product was featured in “The Discover Ontario Guide (fall) 2005”. The Maple Syrup Festival in Bowmanville was featured in “The Ontario Discovery Guide (spring) 2004”.

Ocala and Archibald's wineries began as on-theme activities to the apple and fruit farms and Archibald's has continued to expand their on-theme activities to include a golf course through the apple orchard.

Both wineries are international award winners offering tours, wine tasting, gifts and special events. The County Durham Brewery Company is a Craft/Micro brewery and is included as part of the "Ontario Craft Brewers Tour Guide". Their beers are available at the LCBO and The Beer Store.

Garden Related Attractions

The market segments (seniors and adults) for which gardens have appeal combine their visit to gardens with their interest in other cultural activities. The Region offers heritage gardens at museum sites throughout the Region. In Oshawa for example, Parkwood is recognized as one of Canada's most significant heritage gardens and the Oshawa Valley Botanical Gardens began with the development of a 280 species Peony garden with a plan to continue development.

Market Segments

- *adult couples*
- *families*
- *seniors*

On-Theme Activities

- *golfing*
- *wagon rides*
- *wineries*
- *special events*
- *corn mazes*
- *baked goods*

Purchase opportunities

- *on-site*
- *on-line*
- *toll free phone*
- *third parties within and outside the Region*

Visitation

- *Regional, Provincial & U.S*

Throughout the Region there are unique gardens for visitors to enjoy including Tyrone United Church (1849) and residential gardens that open to the public by appointment or special event.

Many of Durham's municipalities compete in the Communities in Bloom competition with great success and recognition.

Commercial garden attractions are also well recognized beyond Durham's borders: Lamrock Country Gardens features miniature and large roses, over 330 varieties of daylilies and 160 hostas. Mason Hogue is a small English style nursery with display gardens. The focus in this garden is on perennial shrubs, heathers, bulbs and unusual annuals. The owner, Marjorie Mason hosts a garden show on CKDO, a radio station in Oshawa and has personally hosted garden tours since 1985.

A group of 25 private and public gardens are promoting themselves through a brochure called "Rural Garden Destinations". There are also a number of garden tours hosted by horticultural societies throughout the Region.

Cultural Attractions

Durham Region's cultural attractions include museums, galleries, theatre, music performances, art studio tours and events, historical sites, walking and architectural tours.

10% of Durham's annual visitors participate in cultural performances and 6% attend museums/art galleries. Attractions are visited year-round and the average length of

stay is varied, ranging from 1 hour to 2 days. The appeal is both mass and special interest. A recent venture by Star-Ticketing in Uxbridge assists in coordinating the sale of tickets for cultural events.

Museums

These designated heritage sites feature a wide range of architectural styles and offer a variety of activities including tours, live re-enactments, living history activities, programs for interaction and learning (candle making, quilting etc) and plays.

There are 19 museums in the Region offering experiences in automotive history, aeronautical history, military history, golf history, hockey history, aboriginal heritage, railway history, life of the auto baron in mid 1900's and the daily life of pioneers.

Studio Tours and Art Events

The Resource Audit revealed that there are 14 art studio tours and shows that range from weekend to week long events. Durham Region is rich in art history and in current art. This is highlighted by the range of galleries and artists, and the quality of art work available in the Region.

Theatre

There is an abundance of theatrical events ranging from free theatre in the park to dinner theatre for \$50.00 per person. Businesses that have their own building and create performances include Stone Circle Theatre, Oshawa Little Theatre, Class Act Dinner Theatre and Herongate Barn Dinner Theatre.

Performing groups that do not have their own permanent location perform out of local heritage venues such as Uxbridge Music Hall, Town Hall 1873, the Centre for Performing Arts in Clarington and the Whitby Courthouse. These include Onstage Uxbridge, Whitby Courthouse Theatre, Scugog Choral Society, Borelians, Durham Shoe String Performers, Seventh Star Productions and Driftwood Theatre.

Town halls, courthouses, and other types of buildings accommodate live theatre audiences and are suitable for small theatre groups. However, there is a need for a venue to accommodate groups of 300-1000 for concerts and orchestra or dance recitals and competitions.¹

Music Concerts

Musical performances are held in churches, buildings that have been converted into theatres or local arenas. These venues are reasonable to rent, however are not designed specifically for performances. *Figure 2.2:* shows the number of music concerts by local talent (does not include the musical festivals and events or the "Music in the Park" events in each municipality).

Market Segments

- *adult couples*
- *families*
- *seniors*

On-Theme Activities

- *art studio tours*
- *art classes*
- *music performances*

Purchase opportunities

- *on-site*
- *on-line*
- *third parties in the Region*

Visitation

- *Regional, Provincial, & U.S.*

¹ Economic Impact and Needs Analysis Study for a Performing Arts Centre in Ajax/ Pickering

Figure 2.4 Musical performances and number of shows per season

Music Concerts	Shows per Season
Durham Philharmonic	4
Oshawa Durham Symphony	8
Durham Chamber Orchestra	3
Concerts Series	4
Vital Sparks	9
Greenbank Folk Music Society	9
Total	37

Source: Durham Region PrTD Resource Audit, May 2006

Festivals and Events

There are 90 non-musical festivals held throughout the Region. The market segments are adults, families and seniors. The events appeal to both mass and special interest markets and the average length of stay is 2-3 hrs.

Many of the events have historic links to the area while and some are on-theme activities linked to other experiences. The majority of events are held spring through to fall. There is room for event growth in the winter season. Most event experiences can be purchased on-site and information can be gathered on-line.

Of major significance are the weekend and weeklong festivals and events:

- | |
|--|
| <p>Market Segments</p> <ul style="list-style-type: none"> ▪ adult couples ▪ families ▪ seniors <p>On-Theme Activities</p> <ul style="list-style-type: none"> ▪ art studio tours ▪ art classes ▪ music performances <p>Purchase opportunities</p> <ul style="list-style-type: none"> ▪ on-site ▪ on-line ▪ third parties in the Region <p>Visitation</p> <ul style="list-style-type: none"> ▪ Regional & Provincial |
|--|

Figure 2.5 Examples of Durham’s weekend and weeklong festivals and events

The Canadian Aviation Expo	<ul style="list-style-type: none"> ▪ 14 years old ▪ 3 day weekend event held at the Oshawa Airport in June ▪ Canada’s largest aeronautic tradeshow ▪ Air show featuring the Snowbirds ▪ 200 vendors ▪ 25,000 visitors annually
The Oshawa Jazz and Blues Festival	<ul style="list-style-type: none"> ▪ 5 years old ▪ Week-long event held in August ▪ Canadian and local Jazz and Blues performers ▪ local artisans and children’s entertainment ▪ 15,000 visitors annually from Regional, provincial and international markets
The Highlands of Durham Games	<ul style="list-style-type: none"> ▪ 10 years old ▪ Weekend event held in July ▪ Musical entertainment ▪ Celtic livestock demonstrations and displays,

	Highland and Folk dancing competitions <ul style="list-style-type: none"> ▪ 10,000 visitors annually from Regional, provincial and international markets
Fiesta Week	<ul style="list-style-type: none"> ▪ Week long “Taste of Durham” event held in June in Oshawa ▪ Musical entertainment, dance and a parade ▪ 75,000 visitors annually
Agricultural fairs	<ul style="list-style-type: none"> ▪ 8 events held throughout Durham ▪ Events are 50 to 150 years old ▪ 2 - 3 day events feature agriculture awareness displays, farmer competitions, demonstrations of local crafts, baking and quilt work, beef shows, rabbit shows, horse pulls, and a variety of musical and dance entertainment ▪ 70,000 total visitors annually
Autofest	<ul style="list-style-type: none"> ▪ 13 years old ▪ Three day event held the last weekend of August in Oshawa ▪ Features classic and vintage cars
Art Studio Tours	<ul style="list-style-type: none"> ▪ 14 weekend events held throughout the year (many in spring and summer)
Maple Syrup Festivals	<ul style="list-style-type: none"> ▪ Held throughout the Region of Durham ▪ Education component, pancake breakfast etc.

Source: Durham Region PrTD Resource Audit, May 2006

There are also unique specialty festivals and events such as the “Cannington Quilt & Craft Show and Sale” and the “Sewfest” in Bowmanville. The “Annual Ribfest” in Oshawa is a 3 day event that is very popular, attracting over 30,000 visitors annually, although it is mainly a draw for visitors from within the Region. Events provide entertainment opportunities for hosts and their visiting friends and relatives.

The Resource Audit identified that a number of very successful and interesting fundraising events also attract visitors to the Region:

- Uxbridge’s “Million Dollar Hole in One” a unique week long golf experience, offering the opportunity to win a million dollars
- The Annual Motorcycles for Myelin held in Oshawa, is popular among the motorcycle enthusiasts
- The Dragon Boat Festival in Port Perry is popular among the racers and public alike, attracting teams from throughout Ontario
- Durham Regional Police Disabled Children’s Games sponsored by the Durham Regional Police

Additional annual musical festivals include:

- The Orono Bluegrass Old Tyme Country Jamboree
- Bowmanville’s Maple Festival and All That Jazz
- Pickering Village Jazz Festival
- Elgin Park Live

SUPPORTING ATTRACTIONS

Supporting attractions are features or facilities that draw guests to a destination by giving additional reasons to travel there. Supporting attractions may be a primary travel motivator to some specialty markets, but generally are a compliment to core attractions. Core attractions for same day visitors are also important supporting attractions for overnight visitors. The following list of attractions was identified during the Resource Audit.

Scugog Island Cruises

Steamboats are an important part of the history of Lake Scugog. One of the first vessels launched in Lake Scugog was called the *Woodman*. The current passenger vessel was built in 2002 and is its namesake. Currently in its fourth year of operation, a visitor can board the 100 passenger vessel and discover Lake Scugog by learning first hand about local history from past to present.

The two hour scheduled theme tours (steamship, history, nature, eco-nature, native history) on the lake are complemented with music, and often with dancing. Cruises run from May to October and include daytime sightseeing cruises, a variety of evening cruises, Sunday brunches, sunset jazz and dinner cruises. Scugog Island Cruises have been featured in the Toronto Star and mentioned in various magazine articles featuring Port Perry. Scugog Island Cruises was awarded the "CVPA Cruise Innovation Award" in 2004. This experience has mass appeal.

Downtowns

Quaint main streets, animated public spaces and Victorian architecture provide the backdrop for leisurely strolls through, and/or shopping in, our historic downtown areas. Shops in picturesque downtown heritage shopping areas offer a relaxing adventure for families and avid shoppers alike. Museums, galleries and festivals and events contribute to a vibrant tourist experience on a year-round basis in the downtown areas.

The revitalization of downtown Oshawa is presenting increased tourism opportunities. The new General Motors Centre opened in November 2006. This centre will be the new home to the Oshawa Generals and the host facility for numerous concerts and events (Example: Opening concerts included Tom Jones, INXS and the Lipizzaner Stallions). In addition, new condominium projects, a redeveloped hotel site, a new regional court house and a performing arts centre at the Regent Theatre, together with tourism related facilities already available in downtown Oshawa (i.e. The Robert McLaughlin Gallery), are projected to increase tourism activity.

Market Segments

- *adult couples*
- *families*
- *seniors*

On-Theme Activities

- *Dinner / Brunch Cruises*
- *Themed Cruises*
- *Sightseeing*

Purchase opportunities

- *on-site*
- *on-line*
- *toll free phone*
- *third parties in the Region*

Visitation

- *Regional, Provincial & US / Int'l*

PHYSICAL LINKS TO ATTRACTORS

Lake Scugog and Scugog Island

The name "Scugog" is an Ojibwa word meaning "marshy waters". The lake forms the shoreline in the town of Port Perry. It has an area of 514 km² with an average depth of 1.3 m and is fed by the Nonquon and Layton rivers and drained by the Scugog River. The lake was formed when William Purdy dammed the Scugog River at Lindsay, Ontario in 1834 to power his grist mill. Today, the lake has a marina and is used for fishing, recreational boating, and is home to Scugog Island Cruises. The lake is surrounded by swamps and marshes which provide habitat for waterfowl and other wildlife.

Lake Ontario

The name of the lake is derived from *Skaniadario*, an Iroquois word meaning either "beautiful lake" or "sparkling water". The Canadian province of Ontario was named after the lake. It is the eastern-most and smallest in surface area (18,960km²) of the Great Lakes. The area around the lake is a fruit growing area (apples, plums, cherries, pears, peaches, and grapes for wine making). It is part of the Great Lakes Waterway and the Trent-Severn Waterway which is used for pleasure boats and connects Lake Ontario to Georgian Bay.

A section of the 740 km Lake Ontario Waterfront Trail runs through the Region and is available for biking, hiking, walking, rollerblading and commuting. There are several beaches, marinas and yacht clubs, parks and natural areas and annual waterfront festivals.

Lake Simcoe

Lake Simcoe is the fourth largest lake in the province with an area roughly 725 km² in size; it forms the northern border of the Region. Its beaches are ideal for swimming, boating, fishing and seadooing in the summer, and it is popular for ice fishing in the winter.

The Oak Ridges Moraine

The Oak Ridges Moraine is one of the most significant landforms in southern Ontario. The Moraine gets its name from the rolling hills and river valleys extending 160 km from the Niagara Escarpment. It runs midway across Durham and, apart from the Township of Brock, it impacts each of the Regions' municipalities. It is a widely forested area that offers an ideal place for wildlife and a wide variety of plant species. Golf courses, ski hills, cross-country skiing, hunting, hiking and other outdoor activities are available within the Moraine.

THE HISTORICAL LINKS TO ATTRACTORS

The Mississaugas First Nations

The Mississauga Nation, a branch of the Ojibwas of the “Three Fires Confederacy”, moved southward from the Sault Ste. Marie area around 1695. The Mississaugas over time, settled into community groupings at the mouth of the Credit River, and locations including the shores of Lake Scugog.

The Mississaugas of Scugog Island First Nation is a small aboriginal community and is the closest First Nation to Metropolitan Toronto. Although one of the smallest First Nations in Canada with determination and a progressive attitude the Mississaugas have developed a community that is growing and provides ample opportunity to experience the history, culture, and heritage of the First Nations through its vibrant people, festivals and events. In partnership with Scugog Shores Museum, they hold an annual Pow Wow and created the Ojibwa Heritage Interpretive Lands (OHIL), an exhibit that interprets the natural and cultural history of the Scugog Watershed prior to European settlement.

The McLaughlin Family

Robert McLaughlin founded the McLaughlin Carriage Co. in 1869. This would eventually lead to his son R.S. McLaughlin beginning the automotive revolution in Oshawa with the McLaughlin Motor Car Co. in 1907 and to the founding of General Motors of Canada in 1918. Robert’s other son, John J. McLaughlin, created Canada Dry Ginger Ale, another product well known throughout North America.

The McLaughlin’s were well loved citizens of Oshawa and contributed to the city in many ways including a band shell in Memorial Park, the Oshawa hospital, Lakeridge Health Cancer Centre, Camp Samac, and the golf and curling clubs. They are also remembered in other landmarks in Oshawa including R.S. McLaughlin High School, McLaughlin Public Library, and The Robert McLaughlin Art Gallery. Contributions did not go unnoticed as R.S. McLaughlin, or Colonel Sam as he was affectionately known by the citizens of Oshawa, was one of the first 35 people to be given the Order of Canada.

The McLaughlin’s also made many contributions outside the Region, for example:

- 1968 - the library and its entire contents at the University of Guelph
- 1967 - the intensive care unit at the Sick Kids Hospital in Toronto
- 1969-1970 - the McLaughlin Science and Theatre building at the Lakefield College School

Designated Historic and Architectural Sites

Creating a rich ambiance throughout the Region there are a total of 234 designated historic sites. Those that contribute to tourist activity including museums, galleries, downtown shops, and attractions are:

- 4 National Historic Sites
- 3 Provincial Historic Sites
- 29 designated local Heritage Sites
- 20 Significant Heritage Sites (properties recognized by the town or municipality as of historic value, but that have not for one reason or another been designated)
- the others are part of 11 walking tours, several driving tours, seasonal house tours; and 2 Doors Open Events

The four National Historic sites in Durham are the Trent-Severn Waterway, the Leaskdale Manse/Lucy Maud Montgomery House, Town Hall 1873 in Port Perry and Parkwood Estate.

The most recognized National and Architectural site is Parkwood Estate. This 12-acre property, located in Oshawa, is one of Canada's finest and last remaining grand estates featuring architectural and interior designs of 1920-1930's, significant heritage gardens and the work of prominent Canadian landscape architects between 1918-1936. Animated tours are available. Parkwood is a popular film site with 12% of their business resulting from film making. It is also a popular venue for weddings and special events (McLaughlin Days, Oshawa Jazz Festival, Garden Tours, etc.).

A fine example of designated architecture is a magnificent Byzantine temple inspired by India's Taj Mahal, known as the Thomas Foster Memorial. Thomas Foster, the mayor of Toronto from 1925-1927, served as a councilor, worked as a butcher and errand boy, and had made his fortune in real estate investment, dying a millionaire at age 93 in 1945. The memorial was built in the countryside of Uxbridge (his boyhood community), and is available for tours on the first two Sundays of June, July, August and September. The site is also used for plays, concerts, weddings and funerals.

Of special significance are the heritage sites that make up the downtown areas in each municipality (See Appendix 5.0 for a list of Tourism Related Heritage Sites).

THE DMO / TOURISM PARTNERSHIPS

Opportunities to build on complementary tourism attractions with nearby destinations have been assessed through Getaway Country Tourism Partnership and the GTA Tourism Network facilitated by Ministry of Tourism and Recreation regional field representative.

Getaway Country Tourism Partnership is a tourism development organization with a mandate is to increase the profile and traffic to the Getaway Country area through assisting, enabling and facilitating local tourism agencies and providers to effectively develop, deliver and promote tourism experiences. Examples are partnering at the

Outdoor Adventure Show, working together to provide training opportunities to the tourism industry.

DESTINATIONS WITH COMPETITIVE OR SIMILAR OFFERINGS

Other destinations with similar offerings have been identified. Durham's product has been compared to similar offerings in:

York Region	35 km
Peterborough County	40 km
Northumberland County	45 km
Peel Region	60 km
Simcoe County	55 km

Some of the core experiences in Durham Region do indeed stand out as distinct from our competition. This is true especially those with specialty market appeal. Although there are some other grand estates (i.e. Castle Loma, and Dundurn Castle), Parkwood is distinct in that the estate contains original artifacts of the McLaughlin family and its' original heritage gardens remain.

No other Ontario destination has racing that compares to Mosport International Raceway as it is the largest of its type in Ontario and is one of only 3 tracks in the world to have hosted Formula 1, Can-Am and Indy Car events.

VISITOR EXPERIENCE

Due to the limited number of businesses in each sector that utilized guest surveys information is not available to establish whether or not Durham Region's offer is superior because of better guest experiences.

POSITIONING STATEMENT

At one time, the tourism product positioning statement was 'The Countryside Just East of Toronto'. Over the past few years this changed based on the growth of the area and the urban product available. Recently "City Sight Country Delights" was being used to describe the types of offerings available.

A brand development strategy is underway using the findings obtained from this study.

MARKET APPEAL

The Resource Audit identified that the destination attractions appeal to regional, provincial, national, US and international markets. Detailed findings are available on the Resource Matrix (See Appendix 6.0). In 2004, of the total overnight visitation to Durham; 38,735 or 4% were from other provinces, 79,556 or 9% from the U.S, 36,618 or 4% from other international markets; 732,855 or 83% from Ontario.

Figure 2.6 Total trips by place of residence (Top 10)

Place of Residence	Person Visits
Toronto Metropolitan Municipality	756,968
York Regional Municipality	433,208
Durham Regional Municipality	215,085
Peel Regional Municipality	203,034
Peterborough County	198,525
Simcoe County	160,478
Northumberland County	115,403
Victoria County	110,450
Halton Regional Municipality	93,632
Waterloo Regional Municipality	68,197

Source: Canadian Statistics, Canadian and International Travel Survey

A significant number of visitors are from the border states, (71,228) including 30,174 from Michigan; 15,112 from New York and 11,915 from Ohio.

Core attractions are relevant to both mass and special interest markets and these market segments are characterized as touring families, seniors, adults, shoppers, golfers, race enthusiasts, sport spectators and participants, theatre and music enthusiasts. *Figure 2.7*: lists top ten activities among overnight visitors.

Figure 2.7 Activities on trip among overnight visitors in 2004 (Top 10)

Activities	Person Visits
Visiting friend and relatives(VFR)	774,701
Shopping	464,737
Any Outdoor / Sports Activity	257,861
Sightseeing	140,926
Nightlife	137,197
Cultural Performances	92,546
Sports Events	87,913
Golfing	71,915
Museums/ Art Galleries	55,180
National Provincial Nature Parks	52,953

Source: Statistics Canada, Canadian and International Travel Survey 2004

The attractors that are available in the Region have appeal to the current tourist market base that consists of:

- Adult groups with an average age of 41 (90%);
- Adults with Children/ Teens (10%).¹

Although some attractors are offering activities on a seasonal basis and some year-round, there is a sufficient offering to have some attractiveness year-round for the Regional short haul visitor.

¹ Statistics Canada CTS/ITS 2004

ELEMENT B: QUALITY AND CRITICAL MASS

Rating: **PARTIAL**

The Quality and Critical Mass element measures the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging:

- core and related experiences
- entertainment, shopping and dining

B1. The destination offers a range of memorable experience-creating, core and on theme activities sufficient to sustain interest for more than 24 hours. **Partial**

Measure	Rating
i. The core destination experience stands out as memorable to the visitor	Partial
ii. The core experience is typically consumed over a period greater than 24 hours	No
iii. A variety of on-theme activities are available to give guests a reason to stay overnight	Partial
iv. The average length of stay at the destination is greater than 24 hours	No

B2. The destination offers a range of memorable experience-creating, core and on-theme activities sufficient to sustain tourist interest on a year-round basis. **Partial**

Measure	Rating
i. The destination offers a range of memorable experience-creating, core and on-theme activities sufficient to sustain tourist interest on a year-round basis	Partial
ii. The destination offers on-theme activities on a year-round basis	Partial

B3. Core activities are easily accessible to a variety of market segments at a variety of price points and layer of added value. **NO**

Measure	Rating
i. Core and on-theme activities are easy to buy	No
ii. There is a range of options and price points available for a variety of segments to engage in core or on-theme activities	Partial

B4. The destination offers a variety of activities attractive to a variety of market segments at a range of price points and layers of added value. The range extends from most basic to multiple layers, including opportunities for relaxation, entertainment, learning, skill development, adventure and new experiences. **Partial**

Measure	Rating
i. The destination offers a variety of activities attractive to a variety of market segments at a range of price points and layers of added value. The range extends from most basic to multiple layers, including opportunities for relaxation, entertainment, learning, skill development, adventure and new experiences	Yes
ii. This range of activities is well promoted to, and understood by, guests	Partial
iii. This range of activities is easy to buy	No
iv. Groups have cooperatively invested in programming or animating public spaces, gathering and queuing areas	No

B5. The destination offers cultural experience and entertainment options, from basic to venues/shows/events credible at regional to larger scales, over a range of price points. **Partial**

Measure	Rating
i. The destination offers a range of cultural experience and entertainment options	Partial
ii. Events or venues in the last two years included performances by artists with name recognition beyond the local region	Partial

B6. The destination offers a broad range of dining options. **Partial**

Measure	Rating
i. The destination offers a range of dining options at a range of price points	Partial
ii. A number of restaurants have wine lists with more than 25 wine labels	Partial
iii. A number of restaurants have trained and accredited chefs	Partial
iv. A number of restaurants/chefs have name recognition beyond the local region	No

B7. The destination offers a broad range of shopping options. **Yes**

Measure	Rating
i. The destination offers a range of retail shopping opportunities including clothing, crafts and memorabilia at a range of price points.	Partial
ii. Stores or galleries in the destination area have name recognition beyond the local region	Yes

SUSTAINING INTEREST FOR MORE THAN 24 HOURS

The core destination experiences offered in Durham Region stand out as memorable because of the opportunities to partake in activities that are unique to Durham and engage the entire family.

Although Statistics Canada CTS and ITS show that 71% of visits are day visits and only 29% of the visits are overnight stays, the Resource Audit revealed that there are

sufficient activities to sustain longer visitation and the addition of new fixed roof accommodations indicates a natural trend towards an increase in overnight stays. However, strategies need to be developed to enhance awareness of tourism product among both visitors and local stakeholders in order to encourage longer stays.

Figure 2.8: lists core and supporting activities and the duration in hours or days.

Figure 2.8 core and supporting activities and the duration in hours or days.

Core and Supporting Activities	Duration (Hours/Days)
Mosport Racing	2 days
Golfing	2-5 hours
Accessible Outdoors	Camping 2 days, ice fishing 12 hours, sport fishing 8 hours, ATV/dirt bike tours 6 hours, trails for hiking 2-5 hours, boating 5 hours
Downtown Shopping Port Perry	4 hours
Accessible Agriculture / Gardens	1 hour to 2 days or more depending on activity and level of interest
Scugog Island Cruises	2-4 hours
Festivals & Events	3-5 hours
Gaming	1-2 hours
Studio art tours/art classes	1-2 days
Skill development-race car driving, golf,	4 hours
Zoos	2-4 hours
Theatre and entertainment	2-3 hours

Source: Durham Region PrTD Resource Audit, May 2006

SUSTAINING INTEREST YEAR-ROUND

A portion of the core attractions and supporting attractions are seasonal by nature, however the destination offers sufficient activities to sustain tourist interest on a year-round basis. *Figure 2.9:* lists core and supporting activities seasonality and price range.

Figure 2.9 Tourist Activities by Season and Price Range

Overnight Core	Season	Price Range
Mosport racing	Spring - Fall	\$15 - \$60
Golfing	Spring - Fall	\$10 - \$80
Business/Educational Facilities	Year-round	
Sporting Events	Year-round	
Day Trip Core		
Shopping	Year-round	Discount to high end
Accessible Outdoors	Year-round	
Cultural activities	Year-round	Free - \$50
Accessible Agriculture	Spring - Fall	
Gardens	Spring - Fall	Free - \$15
Zoos	Spring - Fall	Free - \$16
Casino/Gaming	Year-round	
Supporting Activities		
Museums	Some year-round / Spring - Fall	\$2 - \$15
Events Musical/ Non Musical	Year-round	Free - \$50
Skill development, Art and Driving	Year-round	\$50 - \$280, \$150 - \$3,000
Water based activities some ice fishing	Year-round / more Summer	
Entertainment - shopping, dining	Year-round	\$5 - \$35 (dining)
Trails – hiking, cross-country skiing	Year-round	
Wineries	Year-round	

Source: Durham Region PrTD Resource Audit, May 2006

On-theme activities are experiences with a link to the core attraction or they are another way of experiencing the core attraction. On-theme activities derive their attractiveness from their physical or logical relationship to the core attraction.

There is room for expansion of on-themed activities to encourage increased overnight stays. On-theme activities currently offered by core attractions include:

Figure 2.10 Examples of core attractions on-theme activities

Attraction / Season	Activity
Mosport Spring - Fall	<ul style="list-style-type: none"> - Camping - Skill development - Festivals and events
Golf Year-round	<ul style="list-style-type: none"> - Driving ranges - Golf lessons - Dining - Golf events - Golf museum - On-site (golf course) accommodation - Weddings
Agriculture Year-round	<ul style="list-style-type: none"> - Hay rides at farms and orchards - Maple syrup events - Pumpkin events - Baked goods - Golfing in the orchards at Archibald Estate Winery
Zoos May – September Accommodation Year-round	<ul style="list-style-type: none"> - Educational animal shows - Animal rides(elephant) - Children camps - Safari theme accommodation - Animal training/accommodation - Petting animals (baby animals) - Celebrity animals (movie/TV star)

Source: Durham Region PrTD Resource Audit, May 2006

ACCESSIBILITY TO MARKET

All activities can be purchased on-site. A limited number of activities can be purchased on-line and from local third parties in the destinations.

A new venture, Star Ticketing, offers tickets and information on the local theatre and music performances from a central website. This has been especially helpful for the performing groups who do not have their own venue, and has resulted in an increase in sales for these cultural events.

Mosport International Raceway, Scugog Island Cruises and the wineries also sell tickets and offer product through 1-800 numbers, and on-line. A few of the galleries and higher end shops sell product on-line. The accommodations advertise their services on the internet and over half have a 1-800 number. National hotel chains have on-line reservation systems; however, others require that a potential visitor email or phone for reservations.

A central point where purchases of core activities can be made does not exist in the Region (i.e. at visitor centres, etc.).

PRICE POINTS, ADDED VALUE and EXPERIENCE LAYERS

Visitors to Durham can experience a variety of activities with a range of sub-options for each. *Figure 2.11:* shows the wide range of experiences and the variety of price points.

Figure 2.11 Range of experiences and price points

Experience	Activity	Price Range
Relaxation	Golfing	Free - \$35
	Boat Cruise/Boating	\$11 - \$25
	Shopping	
	Festivals & Events	\$2 - \$35
	Studio Art Shows	Free
	Fishing	Free - \$ 45
Entertainment	Annual Musical Festivals	Free - \$60
	Boat Cruise	\$11 - \$25
	Festivals & Events	\$2 - 35
	Dinner Theatre	\$25 - \$50
	Theatre	\$Free - \$50
	Racing	\$15 - \$60
	Casinos, Gaming	Free
	Zoos	\$8 - \$12
	Galleries	Free
	Fairs	\$2 - \$8
Interpretation	Studio Art Tours	Free
	Museums	\$3 - \$5
	National Historic Sites	\$2 - \$8
Education	Second Marsh Conservation Area	
	Scugog Pow Wow	\$2
	Fairs (Agricultural)	\$2 - \$8
	Wine Festivals/ Tours	Free
	Canadian Aviation Expo	\$15 - \$20
	Studio Art Tours	Free
	Galleries	Free
	Highlands of Durham Games	\$10 - \$15
	Festivals and Events	\$8 - \$12
	Cultural/Historic Understanding	Festivals & Events
Art Shows		\$5 - \$25
Fiesta Week		\$5
Museums		\$3 - \$5
Galleries		Free
Scugog Pow Wow		Free
Heritage Walks & Tours		Free
Skill Development	Equestrian Centres	\$35 - \$65
	Art Galleries (classes)	\$50 - \$280
	Canadian Aviation Expo	\$15 - \$20
	Mosport International Raceway	\$480 - \$3,000
	Farms & Orchards	\$6
Adventure	Zoos	\$8 - \$12
	Farm/Orchards on-theme activities	
	Newcastle Outback Paintball	\$10 - \$25

Source: Durham Region PrTD Resource Audit, May 2006

Many activities are advertised on the internet, in newspaper, flyers, brochures and in some cases by direct mail, radio and TV advertisements. During industry consultations it was repeatedly mentioned that individual businesses, owners and staff were not familiar with all the opportunities or how to provide/obtain information to serve their guests. One suggestion was to produce a Region wide hard copy directory that listed all that is available for visitors to do while they are in the Region. This tool would assist staff in referring activities, thereby providing better customer service and the opportunity to increase the length of stay.

Investment in programming and/or animating public spaces, gathering and queuing areas, has resulted in “Music in the Parks” activities, seasonal lighting, signs and banners, flower boxes and benches in downtown areas.

Port Perry is an example of a downtown area that has been successful in having a sustained partnership between the local Chamber of Commerce, BIA and municipality, which has resulted in an animated downtown that consistently attracts and supports tourism activity.

CULTURAL EXPERIENCES

Beyond the core and supporting attractions, a range of cultural and entertainment activities are available for the visitor, at a variety of price points. However, according to a recent study¹, Durham presently has limited facilities for theatre groups and plays. There is a need for facilities that can properly accommodate audiences of 100-300 for live theatre or 300 -1000 for concerts, orchestras, dance recitals and competitions. The General Motors Centre and the future restoration of the Regent Theatre will help fulfill some of the demand.

The Durham West Art Centre Foundation is currently fundraising and working on building the infrastructure for a permanent arts centre in the Ajax / Pickering area within the next five to ten years. When built, the Durham West Arts Centre will become the cornerstone of Pickering and Ajax's arts and cultural landscape. In 2006, Ajax and Pickering councils approved \$25,000 each in funding to the DWAC. In addition, \$50,000 was pledged from the Pickering Mayor's Gala in 2006. The DWAC's vision is to create and manage a creative and performing arts centre for Durham Region.

Figure 2.12: lists current cultural activities with price ranges.

¹ Economic Impact and Needs Analysis Study for a Performing Arts Centre in Ajax/ Pickering Area Dec 2005
DWAC

Figure 2.12 Cultural activities and price range

Activity	Price Range
37 Musical Concerts	Free - \$35
9 locations offering "Music in the Park"	Free
40+ Theatre Events	\$12 -\$50
Doors Open	Free
Art Studio Tours/ Shows	Free - \$30
Heritage Walking Tours	Free
Museum	\$2 - \$5
Gallery Exhibits	Donation
Festivals & Events	\$3 - \$35
Fairs	\$6 - \$20
Garden Tours	\$2 - \$8
Horse Racing/ Gaming	\$0.5 - \$5 and up

Source: Durham Region PrTD Resource Audit, May 2006

In the past few years a number of artists with name recognition beyond the local region have performed in Durham.

Figure 2.13 Entertainers with name recognition

Venue	Artist
Oshawa Civic Auditorium	Alice Cooper and Helix
Sunderland Community Center	Blue Rodeo
Greenbank Community Hall	Ron Sexsmith
Vital Spark Folk Society	Valdi, James Callahan, Mike Ford
Town Hall 1873	Rick Emmett, Quartet Candence
The Thomas Foster Memorial	Kingsway Choir, Sedric Smith, York Minstrel Singers

Source: Durham Region PrTD Resource Audit, May 2006

Figure 2.14: shows the number of music concerts by local talent (this does not include the musical festivals and events or the "Music in the Park" events that go on in each municipality weekly during the summer).

Figure 2.14 Music Concerts by local Talent

Music Concerts	Shows per Season
Durham Philharmonic	4
Oshawa Durham Symphony	8
The Durham Chamber Orchestra	3
Concert Series	4
Vital Sparks	9
The Greenbank Folk Music Society	9
Total	37

Source: Durham Region PrTD Resource Audit, May 2006

There are nine park locations throughout the Region where free music concerts take place during the summer. The live music in the park events are prearranged events that take place once or twice weekly per location.

DINING

Durham offers a wide variety of restaurants however lacks a large number of high-end dining establishments.

A number of restaurants that were included in the Resource Audit did not reply to the survey. Many felt that they are not impacted by tourism. Of the restaurants that returned their surveys:

- 40 were mid price restaurants;
- 15 were fine dining restaurants;
- 10 were fast foods/café.

There are a wide variety of local dining establishments offering the following average entrée prices per person:

Figure 2:15 Restaurants and average entrée price

Restaurants	Average Price
Price range \$ 5 - \$12	
The Antrim House Pub	\$7
Einstein's	\$9
Hank's Pastries Limited	\$6
Harwood Blues Coffee House	\$8
Farmers Kitchen	\$8
Massey's Restaurant	\$12
Johnny's Favourite Eatery	\$11
The Waltzing Weasel	\$11
Price Range \$13 - \$20	
Francesco Ristorante	\$20
Fazio's Restaurant	\$20
Hobby Horse Arms	\$15
Don on Main Café	\$16
Bistro Chanterelle	\$20
Nice Bistro	\$20
Steamers Restaurant	\$13
Sixty – Six on Brock	\$20
Price Range \$21 - \$35	
Soup Shack	\$30
Harpo's Restaurant	\$35
Pepperberries Bistro	\$21
Hot Rock Creative Dining	\$30
Shrimp Cocktail & Café	\$21
Bella Notte Ristorante	\$28
Mondo Ristorante	\$26

Source: The Durham Region PrTD Resource Audit, May 2006

A number of restaurants have trained and accredited chefs and more than 25 wine labels:

- 9 restaurants that have chefs with accreditation; and
- 25 restaurants have 25 or more wine labels.

Figure 2.16: lists restaurants in Durham Region with accredited chefs with their accreditation /certification and *Figure 2.13:* lists restaurants with total wine labels.

Figure 2.16 Restaurants with accredited chefs

Restaurants	Certification
Mondo Ristorante, Whitby	Red Seal
Steamers Restaurant, Newcastle	Red Seal
Brothers' Ristorante, Whitby	Red Seal
Hot Rocks Creative Diner, Whitby	Red Seal
Shrimp Cocktail / Seafood, Whitby	Red Seal
Waters Edge/Great Blue Heron, Port Perry	Red Seal
El Rancho Restaurant, Whitby	George Brown
Zinns Bistro, Port Perry	George Brown
Bistro Chanterelle,	Chef du Cuisine
Don On Main, Uxbridge	National Certification

Source: Durham Region PrTD Resource Audit, May 2006

Figure 2.17 Restaurants with 25 or more wine labels

Restaurants	Total Wine Labels
Mondo Ristorante, Whitby	200 +
Harpo's Restaurant, Oshawa	51
Belle Notte Ristorante, Whitby	40
Hobby Horse Arms, Uxbridge	25
Nice Bistro, Whitby	25
Pepperberries, Brooklin	50
Shrimp Cocktail/Seafood, Whitby	30
El Rancho Restaurant, Whitby	25
Zinn's Bistro, Port Perry	25
Hot Rocks Creative Diner, Whitby	25
Sixty-Six On Brock, Uxbridge	37
Pennelle Bistro, Ajax	25
Pat & Mike's Seafood, Oshawa	25

Source: Durham Region PrTD Resource Audit, May 2006

Fazios Restaurant in Oshawa also has an extensive wine cellar. They conduct two wine tasting events per year in the fall and the spring.

There were restaurants with both local and Regional recognition; however there is a lack of recognition for Durham's restaurants outside of the Region.

SHOPPING

Durham Region offers year-round shopping and provides a range of shopping opportunities, including enclosed shopping malls, downtowns, farm markets and stands, arts and crafts, galleries, antique stores, flea markets and specialty shops.

Quaint main streets, animated public spaces and Victorian architecture provide the backdrop for shopping in our historic downtown areas. *Figure 2.18:* shows a range of shopping opportunities at a range of price points for unique shops in Durham.

Figure 2.18 Range of Shops, products and range of price points

Store	Product	Quality
Settlement House Shops	Home Furnishing/Decor	Mid Price–High end
Lishmans	Fashions	High end
Connie’s Brooklin Village Shoppe Ltd.	Ladies Clothing	High end
Dana’s Goldsmithing	Jewelry	High end
Village Card and Gift Shop	Gift /Collectables/ Home Decor	High end
White Feather Country Store	Mixed – bakery, frozen foods, house-ware, arts and craft and gifts	Mid Price
Luke’s Country Store	Crafts /Home Décor Gifts	Mid Price
The Genuine Article	Arts/Crafts Collectables	Mid Price
Snob Country Collectables	Arts/Crafts	Mid Price
Lafontaine	Ladies Fashions	Mid Price
Henshells Clothing & Gifts	Clothing & accessories	Low to Mid Price
Tyrone Mills 1846	Food	Low Price
Nestleton Country Store	Variety Store	Low Price

Source: Durham Region PrTD Resource Audit, May 2006

A number of retail stores indicated they have name recognition outside the local area, some examples include:

- Settlement House Shops
- Lishmans
- Gallery Brougham
- Kensington Silver Studio
- Meta4 Contemporary Gallery
- Algoma Orchards Limited
- Ocala Orchards Farm Winery
- Archibald’s Orchards and Estate Winery

**ELEMENT C:
SATISFACTION AND VALUE**
Rating: ***PARTIAL***

The Satisfaction and Value criteria and measures document the extent to which the destination offers guests:

- a welcome
- satisfied expectations
- value for money
- what the destination is doing to enhance its performance in these areas

C1. Guests feel welcomed into a community that is happy to host, serve or engage them. **N/C**

Measure	Rating
i. The destination is considered “friendly” or “very hospitable” by guests and by travel agents and tour operators packaging experiences at the destination	N/A

C2. The destination offers a highly satisfying experience to its guests. **No**

Measure	Rating
i. The destination carries out regular surveys which track guest satisfaction and their perceptions of value and hospitality	No
ii. The most recent survey indicated that most guests were very satisfied with their destination experience	N/A

C3. The destination is perceived as offering value for money spent. **Yes**

Measure	Rating
i. The destination is considered “good value” or “expensive but worth every cent” by guests and travel agents and tour operators packaging experiences at the destination	N/A
ii. Key experience and service prices are monitored and are staying constant or trending up	Yes
lii. Visitation is trending upwards	Yes

CUSTOMER SATISFACTION

Due to limited customer satisfaction information available throughout the Region, it cannot be verified that most guests were very satisfied in their destination experience. The Resource Audit revealed that a very limited number of customer satisfaction surveys were implemented.

VALUE

The Resource Audit revealed that key experiences, service prices and visitation are staying the same or increasing. Visitation is on an upward trend. The significant population growth in the last two years, marketing and unique experiences appear to be the reasons for this. *Figure 2.19*: lists key experiences with current price and price trend.

Figure 2.19 Key experiences current prices and price trend

Key Experience/Service	Current Price	Trend	% Increase (past year)
Farms/Farm Markets	Free - \$8	Flat	-
Music and Theatre	\$18 - \$50	Up	5% - 10%
Zoos	\$4 - \$12	Up	10%
Mosport Speedway	\$15 - \$60	Flat	-
Scugog Island Cruise	\$11 - \$25	Up	10%

Source: Durham Region PrTD Resource Audit, May 2006

ELEMENT D: ACCESSIBILITY Rating: **YES**

The Accessibility criteria and measures assess:

- The ease of getting to the destination
- The transportation modes that serve it
- For waterfront communities, "friendliness" to cruise ships or boat passengers
- The recognition given to the importance of transportation to the tourist experience

D1. The destination is within 2-3 hours drive from a major population centre or international gateway, or a lesser drive time from a regional gateway. **Yes**

Measure	Rating
i. The travel time to the nearest major urban market is less than 3 hours	Yes
ii. The population within a 3 hour drive time is substantial	Yes
iii. Drive time from the nearest U.S border crossing or international airport is less than 2 hours	Partial
iv. Flight time from the international to the nearest regional airport is less than 1 hour	Yes
v. Drive time from that regional airport is less than 1 hour	Yes

D2. Travel from the nearest urban centre or gateway is not unpleasant, and is achievable with minimum effort and discomfort. **Yes**

Measure	Rating
i. Travel from the nearest urban centre or gateway is not unpleasant, and is achievable with minimum effort and discomfort	Partial
ii. A direct connection to the destination is conveniently available, or travel by private car is over a route generally accepted as direct and well marked	Yes

D3. The destination is accessible by alternative travel modes and price options. **Yes**

Measure	Rating
i. Alternative modes of travel from the urban centre/gateway are available	Yes
ii. If located on water, the destination is accessible to cruises ships	No
iii. If located on water, the destination offers slips to transient boaters	Yes
iv. If located on the water, the destination offers slips to transient boaters	Partial

D4. The destination is investing in making access to it and its attractions attractive and visitor friendly. **Yes**

Measure	Rating
i. The transportation checklist has been completed	Yes
ii. A minimum of 9 yes's have been recorded	Yes

Map showing Durham Region in reference to South Eastern Ontario



MAJOR POPULATION CENTRE / GATEWAY

Durham Region covers 2,532 square kilometers. Downtown Toronto is 50 km from the western edge of Durham, with a population base of 2.5 million people. The total population within a 3 hour radius is 5 million people.

The two nearest U.S. border crossings are Niagara Falls which is 181 km away and Kingston, which is 214 km away. Driving to these border crossings can take as little as 2 to 2 ½ hours when transportation routes are not congested.

The Pearson International Airport can be reached in as little as one hour depending on highway traffic. Visitors can also commute by taxi, bus, Go Transit, and VIA. The flight time from Pearson Airport to the Oshawa Municipal Airport is less than an hour and the Oshawa Municipal Airport (located off Thornton and Taunton in Oshawa) is within a one hour drive from anywhere in the Region.

TRAVEL TO DURHAM

Travel on Highways 401 and 404 (Don Valley Parkway - DVP) from Toronto is pleasant when the traffic volume is down and there are no accidents or road construction. The people living and commuting in the GTA impact movement on major highways and arterial roads. The Region is accessible via the 401, along the south, which carries high volumes of traffic through the Region; Durham Highway 2, a more scenic route; and Highway 7 or Highway 407 Express Toll Route which enters the Region in the west, north of the lakeshore cities. These routes are all clearly marked.

ALTERNATIVE MODES OF TRANSPORTATION

Alternative modes of travel from the Greater Toronto Area include Go Transit (rail and bus), Greyhound (bus), VIA (rail) and taxi or rental cars.

The Trent-Severn Waterway runs through the Region, enabling avid boaters' to visit areas in Durham on their trip. The destination has 11 marinas, spread throughout the Region, from Lake Ontario in the south to Lake Simcoe in the north. In total, the marinas offer 224 slips for transient boaters, however there are no provision for docking cruise ships. There is also limited tourism product available in close proximity, so a car is still required for a complete experience.

INVESTING IN INCREASING ACCESSIBILITY

The Transportation Resources Checklist was completed. The checklist revealed the following information:

- Durham has a number of Visitor Information Centres:

- Clarington's Visitor Centre is located in Bowmanville just off Highway 401
 - Oshawa's Visitor Centre is located just off Highway 401 in summer and in the Chamber office downtown throughout the year
 - Whitby's information centre recently moved to the Whitby Library in the downtown area
 - Scugog Visitor Information Centre is located on Perry Street in downtown Port Perry
 - The library in Pickering provides visitor information in Pickering
 - Uxbridge Business and Information Centre is located on Toronto Street in downtown Uxbridge.
- Some major tourist transportation routes to the downtowns have directional signage, e.g. off Highway 401 and other arterial roads. However these signs do not indicate if there is tourist activity available in the downtown core, if it is where municipal offices are located, or the local business district.
 - The roads are well maintained and the public spaces are generally attractively maintained with seasonal lights and some banner material. Many participate in "Communities in Bloom" or similar programs.
 - Transportation routes to major attractions have directional signage if the attraction has purchased signage through the Tourist Oriented Directional Signage (TODS) program. The Regional Signage Program is connected to the TODS program and follows the same criteria. Attraction/Tourism operators expressed their concerns with the lack of signs, consistency, limitations, placement of signs, cost and size of signs available.
 - At the present time there is no brochure stand, or taxi information at the VIA Station in Oshawa, or any of the other Go Stations located in Durham Region. Tourist information is available at transportation terminals including:
 - Oshawa Airport;
 - Ajax Greyhound & Go Bus;
 - Oshawa Bus Terminal; and
 - Durham Transit in Ajax.
 - At present there are no tourist traffic congestion problems that require transit-based intervention within the Region; however, tourist traffic can be impeded by commuters on highway routes.
 - It is advisable to visit by car for a complete experience of all that Durham has to offer. The geographic size of the Region makes it difficult for alternative modes of transportation to reach all attractors in the destination. The bus routes that are available do not always coincide with the varied hours of operation of local attractions.
 - Taxi drivers are given service delivery training. All new drivers are required to take the Taxi Driver Training Program at Durham College. This program includes customer service, CPR, culture, and finance. Starting in September 2006, all drivers are required to have this training. Only one taxi company

offers a briefing on tourism products, and offers an onboard video screen connected to a Global Positioning System (GPS) that provides information to customers on community events. All other taxi companies said that they require drivers to inform customers about local attractions, although no formal training is given.

- The responses from the businesses during the Resource Audit indicated that attractions that serve the motor coach tour market have sufficient on-site bus parking or convenient access to a bus parking area. For example Mosport International Raceway, Parkwood, Bowmanville Zoo, Downtown Port Perry and Great Blue Heron Casino all accommodate coaches.

FUTURE INVESTMENTS IN TRANSPORTATION

DURHAM'S REGIONAL CYCLING PLAN

A 25-year project for Durham's Regional Cycling Plan is in progress and will result in a Region wide, visible and connected network of on and off road cycling routes and facilities that will be actively used by all types of cyclists. It will be designed to connect cities, towns, villages and hamlets as well as key attractions.

HIGHWAY 407 TO HIGHWAY 35/115 EXPANSION

An environmental assessment is presently being conducted for the proposed expansion of Highway 407 to Highway 35/115, with two high-speed freeway connections to Highway 401. The extensions of Highway 404 into Durham and related improvements to Highway 48 and 12/48 would provide economic and social benefits for the Region's northern areas. These projects are proposed to be complete by 2021. Exit ramps are also planned at Stevenson Road and Lakeridge Road at Highway 401.

GREATER TORONTO TRANSPORTATION AUTHORITY (GTTA)

The Ministry of Transportation is working with nine transit agencies (including Brampton Transit, Burlington Transit, Durham Region Transit, Go Transit, Hamilton Street Railway, Mississauga Transit, Oakville Transit, Toronto Transit Commission, and York Region Transit) to implement a GTA fare card system. Planning has been completed, business requirements have been developed and the design of the system has been finalized.

A competitive search is underway for a vendor who will implement the system. An announcement of the successful vendor will be made in the near future. Implementation will begin early 2007 and be fully in place across the GTA, from Hamilton to Oshawa, by 2010.

ACCESSIBILITY FOR HANDICAPPED

Although the PrTD workbook focused on transportation accessibility, the Resource Audit also collected information about access for the physically challenged. The Resource Audit found that the majority of attractions had access for persons with disabilities. In the heritage buildings where it was not possible to have access to the entire building there was at least access provided to the first floor and accessible washroom facilities. Over 70% of the festival and events reported having services available for the physically challenged.¹

ELEMENT E: ACCOMMODATIONS BASE Rating: **PARTIAL**

The Accommodations Base criteria and measures assess the breadth and depth of the destination's offering in terms of:

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

E1. The destination offers accommodations across a range of types and a variety of quality levels and price points. **Partial**

Measure	Rating
i. The destination offers rooms at a variety of quality levels and price points	Partial
ii. There is a range of choices in locations relative to attraction venues and a range of price points	Partial
iii. This inventory includes representation by branded and widely known and respected higher end operators	Partial

Durham offers the traveler a range of low to medium priced options for accommodations including motels/hotels, bed and breakfasts, nationally recognized hotels and camping. *Figure 2.20: lists the range of choices and price points in accommodation.*

Figure 2.20 Accommodation choices, number of rooms and price range

Class	# of Properties	# of Rooms	Price Range
RV Parks/Campgrounds	9	66,807	\$10 - \$2,575
Bed and Breakfast	40	124	\$50 - \$250
Lodge / Resort	1	8	\$101 - \$150
Motel-Independent	7	178	\$50 - \$100
Motel-Chain	3	170	\$50 - \$100
Hotel-Independent	1	24	\$50 - \$100
Hotel-Chain	9	2,201	\$50 - \$300

Source: Durham Region PrTD Resource Audit, May 2006

¹ Durham Region PrTD Resource Audit May 2006

Although there are a range of choices in locations relative to attractions, most hotel accommodations are located along Highway 401. This limits the opportunity for example to accommodate certain market groups thereby limiting the tourism opportunity in some areas of the Region. The nationally recognized hotel chain accommodations are located along Highway 401 in the southern area of the Region.

Other limitations include:

- The sport fishing industry within the Township of Brock is currently turning away business due to the lack of suitable accommodations. There is potential to draw considerable numbers from U.S. border states if there were a means to accommodate.
- There is not a hotel/motel close to Mosport International Raceway, one of the Region's core attractors. Mosport races begin the weekend of Victoria Day and are held every weekend through to September. There is camping on location at the raceway with accommodation for RV's and trailers. There are several B&Bs within 15-20 minute drive of the raceway. The demand for accommodations to serve Mosport event visitors often fills hotels along Highway 401 as far away as Oshawa and Whitby.
- The inventory includes 12 nationally recognized hotel chain properties, which are busy mid-week with business travel but have weekend availability.

MEETING FACILITIES

The Resource Audit identified that Durham Region has a number of meeting facilities available for business or pleasure. Community halls, golf courses, theatres, galleries, and some museums offer meeting rooms as do the major hotels/motels in the area. There are 20 large scale meeting rooms that can accommodate 200 or more; 15 mid-size meeting facilities accommodating 50-200 persons and 28 small scale meeting facilities accommodating 1-50 persons. This inventory of meeting facilities should be made available to interested parties through publication and / or website.

PERFORMANCE EVALUATION - Rating: *PARTIAL (D)*

The Performance elements, criteria and measures identify the extent to which Durham Region as a destination is successful and recognized in the tourism marketplace. It takes a critical look at how Durham Region does when compared to the Province of Ontario and other competitive destinations with similar offerings. The performance dimension uses provincial, national and international data for Durham Region to evaluate the following criteria:

- Visitation
- Occupancy and Yield
- Critical Acclaim

Completing this section will clearly determine Durham Region's absolute and relative visitation performances in the tourism marketplace, given the experiences offered throughout the Region. It will determine if Durham Region draws a significant share of Ontario's total travel, if it draws from multiple market segments over more than one season, the share of total provincial expenditures by visitors that Durham Region is able to attract and finally, it will answer these questions:

- Is Durham Region 'top of mind'?
- Is it a 'must see/must do' destination?
- Has any of its attraction ranked 'Best in Class'?

It will show if Durham Region is at or near the top of the list of places out-of-town guests must be taken to, or things guests must do when "seeing the sights" in the wider travel region. When compared to places offering the same type of travel experiences, as a destination, is Durham a "must see/must do" destination?

ELEMENT F: VISITATION Rating: *PARTIAL*

The Visitation criteria and measures assess the destination's market performance in terms of:

- its visitation numbers and market shares
- its attractiveness to different market segments
- its attractiveness over the four seasons of the year

F1. The destination draws a significant share of Ontario's total travel to attractions of its type. **Partial**

Measures	Rating
i. The destination attracts a significant number of guests	Yes
ii. The destination attracts a significant share of total VFR/Pleasure motivated travel by residents of Ontario	Yes
iii. The destination attracts a significant portion of its visits from markets beyond Ontario's borders	No
iv. The destination's <u>share</u> of visits by all visitors (day and overnight) to the province from markets beyond Ontario's borders is significant	No
v. The destination's share of meetings and conventions motivated travel to Ontario is significant	No
vi. Total visitation is not dominated by same day guests	No
vii. The destination's share of visits in Ontario which included activities relying on the destination's core attractions classes is significant	Partial
viii. The destination's share of the visits identified above are significant in comparison to competitive destinations in Ontario	Yes

F2. The destination offering draws from multiple market segments. **Partial**

Measure	Rating
i. The destination attracts visitors with differing visitor profiles. Including the following market segments: <i>e.g. families with young children</i>	Partial

F3. The destination offering draws from market segments over more than one season. **Yes**

Measure	Rating
i. Visitation is distributed among multiple market segments over more than one season	Yes

DURHAM'S SHARE OF PROVINCIAL VISITATION

The destination attracts a significant share of Ontario's total travel to attractions of its type. The destination attracts a significant number of guests. In 2004, Durham attracted 3,034,154 guests; 2,146,386 on day visits, with 887,768 staying overnight. The source of these estimates is the CTS/ITS 2004.

VFR/PLEASURE MOTIVATED TRAVEL

The destination attracts a significant share of the total VFR/Pleasure motivated travel by residents of Ontario. In 2004 the destination captured 3% of the total 70,890,387

number of VFR/Pleasure motivated trips taken by Ontario residents. Durham's share of those day trips was 4%. Durham's share of overnight visits was 2%.

VISITATION FROM BEYOND ONTARIO'S BORDERS

The destination attracts visitors from markets beyond Ontario's borders. In 2004, visitation came from the following geographic areas for overnight and daytrips.

Overnight visits:

- 38,735 or 4% from other provinces
- 79,551 or 9% from the U.S.
- 36,618 or 4% from other international markets
- 732,855 or 83% from Ontario

In 2004 same-day visitation came from the following geographic markets:

Same day visits:

- 4,118 or 0% from other provinces
- 30,810 or 1% from the U.S.
- 10,151 or 0% from other international markets
- 2,101,307 or 98% from Ontario

The destinations share of visits by all visitors (day and overnight) to the province from markets beyond Ontario's borders is not significant. In the year 2004, destination visits by guests from the following origin markets accounted for the identified share of out-of-province visitation to Ontario:

- 1% of the total 5,847,224 trips to Ontario by guests from other provinces
- 1% of the total 21,391,369 trips to Ontario by guests from the U.S.
- 2% of the total 2,049,374 trips to Ontario by other international guests

CONVENTION AND SPORTS TOURNAMENTS/EVENTS

The destinations share of meetings and conventions motivated travel to Ontario is significant.

In the year 2004, the destination attracted 33,758 meetings and conventions motivated trips, or 1% of the total meetings and conventions motivated trips to Ontario.

SAME-DAY VISITS

Total visitation is dominated by same-day guests (71%).

SHARE OF VISITS IN ONTARIO RELYING ON CORE ATTRACTION CLASSES

The destinations share of overnight visits in Ontario which included activities relying on the destinations core attractions classes is not significant, 2% or 887,768 overnight visits out of the 46,672,218 overnight visits to Ontario.

In 2004, overnight destination visitation which included activities identified below represented the stated shares of all overnight trips in Ontario which included the same activities:

Figure 3.1 Durham visits as percent of total Ontario visits with specific activity

Activity	Ontario Visits	Durham Visits	Percentage Share of Ontario Visits
Visit Friends and Relatives	28,791,781	774,701	3%
Shopping	20,781,743	464,737	2%
Golfing	1,667,525	71,915	4%
Sport Event	2,900,123	87,913	3%
Cultural Performances	3,450,616	92,546	3%
Zoos/Aquariums/Gardens	1,977,019	31,933	2%
Museums and Galleries	4,113,757	55,180	1%
Historic Sites	4,989,036	51,001	1%

Source: Statistics Canada, Canadian and International Travel Survey, 2004

The destination's share of visits identified above are equal or slightly greater in some cases, in comparison to competitive destinations in Ontario. *Figure 3.2:* shows Durham's percentage share of overnight visits in Ontario, compared to competitive destinations in Ontario which included the same activities.

Figure 3.2 Durham's share of overnight visit activities compared to competitive destinations.

Activity	Total Overnight Ontario	Durham Region % share	York Region % share	Halton Region % share	Simcoe County % share	Northumberland County % share
VFR	28,791,781	3%	2%	2%	6%	1%
Shopping	20,781,743	2%	2%	2%	6%	1%
Golfing	1,667,525	4%	2%	1%	10%	2%
Sport Events	2,900,123	3%	1%	3%	4%	1%
Cultural Performances	3,450,816	3%	1%	2%	4%	1%
Zoos	1,977,019	2%	1%	2%	5%	1%
Museums and Galleries	4,113,757	1%	1%	1%	3%	1%
Historic sites	4,989,036	1%	1%	1%	4%	1%

Source: Statistics Canada, Canadian and International Travel Survey, 2004

MARKET SEGMENT DRAW

The destination offer draws from multiple market segments. The destination attracts visitors with differing visitor profiles, including the following market segments: adults only visitor parties, visitor party with children/teens, business and sports travelers.

MARKET SEGMENT SEASONALITY

The destinations offering draws from market segments over more than one season. Visitation is distributed among multiple market segments over more than one season.

Quarterly distribution of total visitation is distributed as follows:

21% in Q 1, 22% in Q2, 36% in Q3, and 21% in Q4

Visitation for the adult only segment is distributed as follows:

22% in Q1, 24% in Q2, 33% in Q3 and 21% in Q4

Visitation for the family segment is distributed as follows:

15% in Q1, 12% in Q2, 56% in Q3, and 17% in Q4

Figure 3.3: illustrates the quarterly distribution for all guests among market segments.

Figure 3.3 Quarterly Distribution of Guest by Market Segments

Quarterly Distribution of Guest by Market Segments				
All Guests and Market Segments	First Quarter “Jan – Mar”	Second Quarter “Apr – Jun”	Third Quarter “Jul – Sept”	Fourth Quarter “Oct – Dec”
All Guests	21%	22%	36%	21%
Adults Only	22%	24%	33%	21%
Adult With Children/Teens	15%	12%	56%	17%

Source: Statistics Canada, Canadian and International Travel Survey 2004

ELEMENT G: OCCUPANCY AND YIELD Rating: **PARTIAL**

The Occupancy and Yield criteria and measures assess the destination’s market performance in terms of:

- accommodations base occupancy
- guest expenditure levels

With statistics obtained through the Resource Audit and figures supplied by the Ontario Ministry of Tourism and Statistics Canada CTS/ITS, this criteria and measure assesses Durham Region’s performance in terms of accommodation base,

occupancy and guest expenditure levels. Local accommodation base, occupancy and expenditure levels will be compared to norms, provincial averages obtained within the same period (calendar year) and the destination's share of visitation.

G1. The commercial accommodations base has occupancy rates in excess of 65%.
Yes

Measures	Rating
i. The annual average accommodations occupancy rate is over 65%	Yes
ii. Occupancy is spread throughout the year	Yes

G2. The destination attracts a significant share of total provincial expenditures. **No**

Measures	Rating
i. The average expenditure per capita for guests on day trips to the destination is equal to or greater than the provincial average	No
ii. The average expenditure per capita for guests on overnight trips to the destination is equal to or greater than the provincial average	No
iii. The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips in Ontario	No
iv. The destination's share of expenditures by guests on overnight trips is equal to or greater than its share of overnight trips in Ontario	No

OCCUPANCY RATES

From information gathered through the Resource Audit, in 2005 the annual average accommodations occupancy rate in Durham Region was 68.1%.

The quarterly occupancy rate varies by as much as 20% between the lowest quarter and the highest quarter. The third quarter has the highest occupancy rate. This result is comparable to the findings on visitation in the 'market segments and quarterly visitation distribution' section (see Figure 3.3 above). Occupancy is spread throughout the year with most business travel taking place during the week and sport / event travel on the weekends. *Figure 3.4:* shows average and quarterly accommodation occupancy for 2005 (Jan – Dec)

Figure 3.4 Quarterly accommodation occupancy rates

Quarterly Accommodation Occupancy Rate 2005			
Q. 1	Q. 2	Q. 3	Q.4
58%	69%	78%	64%

Source: Durham Region PrTD Resource Audit, May 2006

DURHAM'S SHARE OF PROVINCIAL EXPENDITURES

The destination does not attract a significant share of total provincial expenditures. The average expenditure per capita for guests on day trips to the destination is less than the provincial average. In the year 2004, the average expenditure per capita for guests on day trips was \$39.23 or 63% of the \$62.56 average for Ontario.

The average expenditure per person for guests on overnight trips to the destination is less than the provincial average. In the year 2004 the average expenditure per person for guests on overnight trips was \$139.65 or 52% of the \$270.27 average for Ontario.

The destination's share of expenditures by guests on day trips is less than its share of day trips in Ontario. In 2004 total spending by guests on day trips to the destination was \$84,075,257. Total spending by all tourists on day trips in Ontario was \$4,474,312,928. The destination's share of total spending by these tourists was 2%, while the day trip visitation was 4%.

The destination's share of expenditures by guests on overnight trips is less than its share of overnight trips in Ontario. In the year 2004, total spending by guests on overnight trips to the destination was \$123,976,085. Total spending by all tourists on overnight trips in Ontario was \$12,606,368,516. The destination's share of total spending by these tourists was 1%, while the overnight visitation share was 2%. *Figure 3.5: shows average spending by overnight visitors by geographic origin.*

Figure 3.5 Average per night spending by overnight visitors by geographic origin. *Note: Average length of stay is 2.6 nights*

Average Spending by Overnight Visitors by Geographic Origin				
Average \$ spent	Ontario	USA	Other Countries	Average
Durham Region	\$51	\$85	\$45	\$54
Province of Ontario	\$70	\$132	\$105	\$84

Source: Statistics Canada, Canadian and International Travel survey 2004

ELEMENT H: CRITICAL ACCLAIM Rating: **PARTIAL**

The Critical Acclaim criteria and measures address the extent to which the destination is recognized as:

- “must see/must do” on general grounds or those more specific to a given type of experience
- having a profile that contributes to the attractiveness of Ontario and Canada as a destination
- a top-ranked place to visit

The Critical Acclaim element assesses the extent to which Durham Region is recognized as a “must see/must do” destination. It addresses the extent to which the

destination has a profile that contributes to the attractiveness of Ontario and Canada and, most importantly, whether Durham Region is a “top-ranked” place to visit when compared to other destinations in Ontario. In the simplest terms it assesses whether Durham Region is recognized as standing out from other competitive destinations. Is it a ‘must see/must do’ destination?

H1. The destination is considered as “must see / must do” and is recognized as a symbol of its type of travel experience. **Partial**

Measures	Rating
i. The destination is at the top or near the top of the list of places out-of-town guests must be taken, or things guests must do when “seeing the sights” in the wider travel region	Partial
ii. The destination is at or near top of mind when considering “must see/must do” places or activities offering the same type of travel experience as the destination	Partial

H2. The destination has a role in branding/marketing Ontario and/or Canada. **Partial**

Measures	Rating
i. Destination imagery of, and/or text about, the destination or its core attraction(s) is used in promoting Ontario and/or Canada	Partial

H3. The destination or its attractions have been ranked “Best in Class” or “Top Tier” in consumer or industry rankings. **Yes**

Measure	Rating
i. The destination or its core attraction(s) has (have) been ranked as “Number 1,” “Best in Class” or “Top Tier”	Partial
ii. Other products or experiences in the destination have been ranked as “Number 1,” “Best in Class,” “Top Tier,” or otherwise recommended	Yes

RECOGNITION AS ‘MUST SEE’ DESTINATION

Durham Region does not currently stand out from other destinations and would not be considered ‘must see/must do’ for the average visitor. However, for visitors within the GTA, some of Durham’s product stands out from other competitive destinations with similar offerings.

The destination may not be widely recognized, but some centres within the Region are. Durham’s key experiences – automotive history and action, range of outdoor activities, gardens and gardening for avids, agriculture, shopping in downtown Port Perry, destination golf, and hands-on zoos - attracts short haul Regional visitors, although few are widely recognized by provincial, national and international guests.

Durham lacks a world-class and easily recognizable attraction. Mosport International Raceway, the only raceway of its type in Canada, continues to develop into a ‘must do’ attraction among the racing community. However its special interest market

appeal limits its impact in Durham’s overall attractiveness. Durham’s ‘Accessible Agriculture’ (apples, Farm Fresh, and agricultural products), while key to the Region’s tourism offering, is not unique but competes well among other destinations with a similar offering.

It is becoming increasingly evident that Durham Region’s ‘hands-on’ zoos, because of their size and format, offer a unique experience. For example, at the Region’s zoos you are more able to experience the animals close-up and ‘hands-on’ (i.e. ride elephants, feed, pet, witness feeding and experience animal shows).

DURHAM’S ROLE IN BRANDING ONTARIO

Durham images have been featured in provincial marketing campaigns; *Figure 3.6*: is a partial list of publications that Durham’s products have been featured in.

Figure 3.6 Publications that have featured local products

PRODUCT	PUBLICATION/DESCRIPTION	DATES
Parkwood Estates Heritage Gardens	Ontario Discovery Guide	Spring 2005
Bowmanville Maple Syrup Festival	Ontario Discovery Guide	Spring 2005
Durham Region Apple Product	Ontario Discovery Guide	Fall 2005
Thomas Foster Memorial	Architecture in Canada	2003
Downtown Port Perry	Edifice Magazine	2005
Lucy Maud Montgomery Manse	Canadian Homes and Cottages	2004
Lucy Maud Montgomery Manse	ARCHI-Technology Magazine	2003
Mosport International Raceway	Various National & Int’l Media	

Source: Durham Region PrTD Resource Audit, May 2006

NOTABLE AWARDS RECEIVED BY CORE/ON-THEME/SUPPORTING ATTRACTIONS

Tourism operators and products throughout Durham Region have received awards and recognition. *Figure 3.7* shows Durham Region’s tourism operators who have received awards/recognition.

Figure 3.7 Durham’s tourism operators who have received awards/recognition

Attraction/Business	Award	Year
City of Oshawa	International Communities in Bloom	2005 2004
Deer Creek Golf Course	Best Teaching Facility – Toronto Sun 4 Diamond Top 18 Holes – Toronto Sun Friendliest Staff – Toronto Star Best Practice Facility – Toronto Sun	2002-05 2002-05 2004-05 2004
Quality Suites Whitby	Choice Hotel Bronze Award	2002-05
Royal Ashburn Golf Course	Top 50 Golf Courses in Canada – Globe & Mail	2003
The Settlement House	Canadian Gift & Table Assoc.-Retailer of the Year	2002
Bowmanville Zoo	Thomas Bain Award of Excellence - Globe & Mail	
The Robert McLaughlin Gallery	Ontario Association of Art Galleries (OAAG) Design Award - (Merchant Capital Group Design Awards, Presented by Di Brandt)	

Source: Durham Region PrTD Resource Audit, May 2006

It is also worth mentioning that some local attractions have received coverage in national and international media (e.g. Parkwood, The R.S. McLaughlin Estate and Mosport International Raceway). Other local attractions have received awards and recognition within the province and Canada (e.g. Jungle Cat World, Karen Richards Gallery, Durham Philharmonic Choir and Scugog Choral Society). Some of Durham’s festivals and events have received awards and recognition (e.g. Best Performance Award, Civic Pride Award and Award of Distinction, Festival & Events Ontario’s Top 50).

Also notable, Durham is home to North America’s 2006 Town Crier Champion Mr. McKee. Mr. McKee is the Town Crier for Oshawa, Uxbridge and Port Perry.

FUTURITY EVALUATION - Rating: *PARTIAL* (D)

The purpose of the Futurity dimension is to identify the scope to which Durham Region as a tourist destination is investing in its future as a place with viable and continuing attractiveness to evolving markets. The elements and measures identify the extent to which the destination targets viable markets, invests in managing and promoting its tourism marketplace and consults with the travel trade operators and agents serving the areas visitors and residents.

ELEMENT I: DESTINATION MARKETING Rating: *PARTIAL*

The Destination Marketing criteria and measures identify 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

11. The destination's product offerings are created and packaged to attract significant market segments with prospects for stability, if not growth. **Yes**

Measures	Rating
i. There is a market demand for the destination's type of offering	Yes
ii. Market demand to the destination's type of offering is stable or growing	Yes

12. There is a Destination Marketing Organization (DMO) in place with funding sufficient to sustain awareness and motivate travel from target markets. **Partial**

Measure	Rating
i. There is a DMO in place with a focus on the local destination vs. a larger travel region	Yes
ii. The DMO is funded at a level sufficient to reach target markets through print and electronic (e.g., Internet, toll-free phone lines, etc.) media	Partial
iii. The DMO conducts surveys which track the influence of marketing on guest visits	No

13. Travel Trade operators and agents have been contacted for advice on product and package development opportunities. **Yes**

Measure	Rating
i. The Travel Trade Resources Checklist has been completed, and	Yes
ii. a minimum of 10 "Yes" has been recorded [A minimum of 7 "Yes" is required for an "Partial"]	Yes

14. A tourism development and marketing strategy is in place. No

Measure	Rating
i. A destination development and marketing strategy focusing on growth in visitation and/or yield has been developed and is being implemented	No

15. Performance towards the development plan's objectives is being monitored. No

Measure	Rating
i. A program for tracking progress towards objectives is in place	No

16. Customer service training programs are in place. Partial

Measure	Rating
i. There is a customer service training program in place at the key experience/activity providers, as well as programs for the service community generally	Partial

MARKET DEMAND

There is a market demand for the Region's product offerings. Between 1998 and 2004 total visits have grown by 12%¹, and the demand for the Region's product is stable according to the statistics in the Regional Tourism Profiles which indicated there were over 3 million visitors in 2004². The eTAMS report indicated that visitors traveling from the U.S. to Ontario would increase slightly through the next 3 to 4 years. However, the introduction of the new passport requirement, the Canadian dollar value, the increase in gas prices and concern for terrorist threats may result in a decline in visitation from the U.S. and other international markets.

Information collected through the resource audit indicates that only a handful of businesses in each sector are currently packaging with other businesses. A small percentage of the accommodations create packages. For example, the Holiday Inn Express in Whitby is currently offering shopping, theatre and wedding packages.

More partnering and packaging will create an increased awareness of all the activities available, encourage greater use of the existing product, make it easy to book and give people continued reason to visit.

¹ Ontario Ministry of Tourism - Durham Regional Tourism Profile, CTS/ITS 2004

² eTAMS report and the Regional Tourism Profile

DESTINATION MARKETING ORGANIZATION

There is a Regional Destination Marketing Organization (DMO) in place which is presently funded to sustain awareness and motivate travelers from target markets. Most marketing currently implemented is print and electronic media (e.g. Internet, toll-free phone lines, etc.). Various organizations provide destination marketing services including the Greater Oshawa Chamber of Commerce, Municipality of Clarington, the Scugog Chamber of Commerce and Port Perry BIA.

At the time of this evaluation there were no surveys being conducted by DMOs to track the influence of marketing and guest visitation.

WORKING WITH TRAVEL TRADE

Durham Tourism invests time and resources on an annual basis consulting with the travel trade operators bringing visitors to the area. An inventory of tour operators that bring groups to Durham was used to contact operators during the Resource Audit for their advice on product and packaging development opportunities. The Travel Trade Resource Checklist was completed and a detailed inventory of receptive tour operators was compiled. A local receptive tour operator participated on the Steering Committee.

Tour operators are communicated to on a regular basis through market places (OMCA) and follow-up information. This allows for identification of attractions, accommodations and other facilities and services used. More contact and working closely with the industry serving the area is needed to ensure they are addressing opportunity to improve visitor experience and increase visitation.

DEVELOPMENT AND MARKETING STRATEGY

The current Regional marketing strategy is a modification and enhancement of what was created in the past. One of the outcomes of the Premier-ranked Tourist Destination Framework is the creation of a clear strategy enabling the DMO to move forward in an effective manner. This will include a new 5-10 year Tourism Development Strategy and a new brand position for tourism in the Region. Both the strategy and the brand are to be launched by 2007.

Marketing programs have been difficult to track in the past because coupons and advertising in printed material depended on not only regional tracking but also participating tourism operators implementing tracking methods and sharing the information on results.

New technologies (mainly on-line) are making it easier to track and obtain information on interested visitors.

CUSTOMER SERVICE TRAINING

The Resource Audit showed that in-house customer service training programs were being used by most tourism operators to train front line staff. Strategy development meetings suggested that a “host” training program would be highly beneficial as the Region moves forward in its goal to increase tourism activity and to create consistency in approach. Other ideas discussed include the development of tools for use by all front line staff with information on what else there is to do in the destination and the process of helping front line staff understand what visitors expect as a standard.

ELEMENT J: PRODUCT RENEWAL Rating: **YES**

The Product Renewal criteria and measures assess the extent to which the destination is making capital investments in its attractiveness into the future.

J1. Reinvestment and new investment is occurring to enhance, revitalize or develop facilities relevant to the quality of the tourist experience. **Yes**

Measures	Rating
i. In the past five years, capital has been invested in facility renewal, expansion or development	Partial
ii. A significant portion of that investment occurred in the past two years	Yes
iii. Core attractions demonstrate an ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience	Yes

J2. Investment and reinvestment in underdeveloped or underperforming assets is occurring. **Yes**

Measures	Rating
i. Underdeveloped and underperforming assets (or the absence of same) have been identified in the Resource Audit	Yes
ii. Investments and/or reinvestments are being made in developing or revitalizing underdeveloped or underperforming assets	Partial

CAPITAL INVESTMENT

Reinvestments and new investment is occurring to enhance, revitalize or develop facilities. In the past 5 years capital has been invested in facility renewal, expansion or development.

The following table shows that in each tourism sector a percentage of businesses have made significant investments in the past 5 years, *Figure 4.1*: lists investments by tourism sectors.

Figure 4.1 Percentage of businesses Investing

Sector	Percentage of businesses Investing
Attractions / Festivals	50%
Accommodations	40%
Golf	51%
Parks and Trails	72%
Retail	39%
Dining	46%

Source: Durham Region PrTD Resource Audit, May 2006

Of the investment that has occurred, 64 % has been in the past two years. (see Appendix 7.0 for a detailed list of new investments that have taken place in the last two years, are currently underway or planned). The Resource Audit revealed that investments are occurring in all sectors including core attractions.

The Resource Audit identified underdeveloped and underperforming assets. (see the Resource Opportunity Matrix for a complete list). The Resource Audit indicated that “underdeveloped assets” are those assets for which there is a consensus that, with further investment and/or marketing effort, the asset would likely become a core or supporting attraction.

ELEMENT K: MANAGING WITHIN CARRYING CAPACITIES

Rating: ***PARTIAL***

The Managing With-in Carrying Capacities criteria and measures assess the extent to which the destination is aware of, and manages within, the capacity thresholds of it's:

- local economy
- ecosystems setting and soft services infrastructure
- guests' satisfaction levels
- hard services infrastructure
- administrative systems

K1. Destination visitation generates economic benefits to the host community. Yes

Measures	Rating
i. Guest visits and expenditures make a net positive contribution to the local economy	Yes
ii. Benefits and costs are balanced equitably across municipal boundaries	Partial

K2. Visitation does not consume local resources or increase their values to an extent that the local population is negatively affected. Yes

Measures	Rating
i. Attractiveness of the destination to recreational or retirement home or investment markets has not bid up the cost of housing to the extent that it is unaffordable to the locally employed population	Yes
ii. Where labour pool constraints are occurring, a plan to resolve the problem is being implemented. (Record N/A below and leave the boxes blank if the preceding answer is 'Yes')	N/A
iii. Servicing guest visitation, or the investment to attract and accommodate it, does not consume labour or materials to the extent that their cost or availability to other sectors is impairing those sectors' profitability	Yes
iv. Where resource cost or availability impacts are occurring, a plan to resolve the problem is being implemented. (Record N/A below and leave the boxes blank if the preceding answer is 'Yes')	N/A

K3. Trained labour is available to serve visitation demands at a level that maintains guest satisfaction. Partial

Measures	Rating
i. There is a labour pool sufficient to accommodate current and projected levels of visitation	Partial
ii. Where labour pool constraints are occurring, a plan to resolve the problem is being implemented (Record N/A below and leave the boxes blank if the preceding answer is 'Yes')	
iii Guest surveys confirm satisfaction with hospitality and service	Partial
iv. Where dissatisfaction has been identified, a plan to resolve the problem is being implemented. (Record N/A below and leave the boxes blank if the preceding answer is 'Yes')	

K4. Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by destination visitation. Yes

Measures	Rating
i. There is an environmental monitoring program in place which provides early warning that the quality of the resource or the visitor experience is at risk of being impaired	Yes

ii. There is a community health and well-being monitoring program in place that provides early warning of whether quality of life impact thresholds are being approached	Yes
iii. Evidence from formal monitoring programs or informal observations indicates that no capacity/thresholds are being exceeded	Yes
iv. Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented	Yes

K5. Growth in visitation to the destination is not threatening the experience enjoyed by current visitors. **Yes**

Measure	Rating
i. Overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience is not being raised as issues by guest surveys or by managers of facilities and resources	Yes
ii. If issues are raised, they relate to one or two peak weekends only	N/A
iii. A response to identified issues has been defined and is being implemented	N/A

K6. Infrastructure is available to accommodate current or projected levels of demand without exceeding carrying capacities. **Yes**

Measure	Rating
i. There is current/planned water treatment and delivery capacity to accommodate current and projected levels of visitation	Yes
ii. There is current/planned sewage treatment and trunk capacity to accommodate current and projected levels of visitation	Yes
iii. There is current/planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation	Yes
iv. Assessments of the environmental effects of infrastructure expansions have been completed, with effects considered manageable and acceptable	Yes

K7. Municipal entities with approval authority are able to address development applications in a timely manner. **Yes**

Measures	Rating
i. Local and upper tier (where present) Official Plans have tourism related objectives and policies in place	Yes
ii There is a political will to move forward with those projects considered to further the objectives expressed in the Official Plan or other planning documents	Yes
iii. There are sufficient administrative resources in place to efficiently manage review, approvals and permit processes	Yes

ECONOMIC BENEFITS

Guest visits and expenditures generated \$4,486,000 in municipal tax revenues in 2004. Visitor expenditures are distributed among the municipalities based on the existence of tourism product. In 2004 visitors spent \$208,051,342 in Durham Region, generating \$145,908,000 direct and indirect contributions to the Gross Domestic Product, \$73,707,000 of labor income, 2,558 full-time and part-time jobs, and tax revenues totaling \$89,940,000.

INCREASED VISITATION AND LOCAL RESOURCES

The attractiveness of the Region to recreational, retirement homes, and investment markets has not bid up housing costs. Although real estate prices are escalating, the annual Building Permit Activity Review¹ states that population growth is the reason for the increase in the demand for housing in general and the main driving factor.

Servicing guest visitation, or the investment to attract and accommodate it, does not consume labor or materials to the extent that their cost or availability to other sectors is impairing those sectors profitability.

TRAINED SKILLED LABOUR

Statistics Canada places Durham's work force at 316,000 with a population of 506,901¹. Trained labour in the Region is available to serve visitation demands at a level that maintains guest satisfaction. The Resource Audit results showed that the industry felt there was sufficient trained labour available. There was however concern about sufficient volunteer labour.

The Resource Audit results showed in-house training is taking place, however discussions at the industry sessions revealed that greater attention must be given to train staff and to provide information to residents and volunteers regarding local opportunities.

A very limited number of operators currently conduct satisfaction surveys with guests. Conversations with tourism operators and limited survey information collected indicated that guests had an interesting experience and will also tell others about their visit. The strategy needs to address this lack of visitor or guest surveys Region-wide.

INFRASTRUCTURE

Durham Region has an Environmental Advisory Committee in place whose function is to advise Regional Council on environmental matters. The Regional Planning Department has a monitoring system for new development. The Regional Municipality of Durham Official Plan (2004) outlines the Region's responsibility to

¹ Durham Region Profile – Demographics & Socio-Economic Data, Planning Department 2006

protect and preserve the environment. Assessments of the environmental effects are considered manageable and acceptable.

Overcrowding, overuse, diminished quality of the environment or diminished qualities of the guest experience are not being raised as issues by guest surveys or by managers of facilities and resources.

There is current and planned water treatment and delivery capacity and sewage treatment and trunk capacity to accommodate current and projected levels of visitation. The plan is described in *The Regional Municipality of Durham Master Plan*.

Local traffic congestion is not a general concern for the citizens of Durham, except for weekday commuter traffic and other peak periods where heavy traffic passes along Highway 401 and Highway 7/12. As a result, there are several major road construction projects underway in and around Durham Region.

For example:

- New on/off ramp at Stevenson Road with north and south connection to Highway 401. Estimated end of project July 2010
- Widening of Highway 401 from Stevenson Road in Oshawa to Bennett Road in Bowmanville
- Public Transportation – The implementation of the new GTTA Fare Card System will enable commuters to travel on public transit from Durham Region to as far as Hamilton using a single card (fare). This will integrate municipal and regional transit planning, and co-ordinate fares and transit service to improve convenience.

According to Parks and Trails Resource Audit results municipalities are investing in the expansion and accessibility of trails.

Assessment of the environmental effects of infrastructure expansions have been completed with effects considered manageable and acceptable as documented in Section 2, page 3 of the Regional Municipality of Durham Official Plan 2004.

POLITICAL WILL

Where present, local and upper tier Official Plans, have tourism related objectives and policies in place.

There is political will to move forward with those projects considered to further the objectives expressed in the Official Plan and other strategic documents.

Although there is political will to develop tourism, it has not yet been translated into concrete strategic actions. There is need to develop a recognized, accepted approach and to promote the positive impact tourism has on the community and the local economy.

CONCLUSIONS

PRODUCT

*Based on the PrTD workbook criteria, Durham Region's tourism **product** was rated as **Partial**, meaning that it met, partially met, and did not meet, various product measures outlined.*

The Resource Audit allowed core and supporting attractions to be distinguished. Although the Region lacks an iconic natural feature that attracts a mass market, there are a number of attractors that appeal to and serve short-haul Regional visitors and visiting friends and relatives. Core attractions that drive visitation on their own tend to appeal to special interest groups, while core experience clusters have a mass appeal.

The landscape or physical setting of the Region along with the history and heritage of the Region compliment core attractions and play a part in creating uniqueness only available in Durham Region. For the most part however, Durham's product does not stand out as distinct, nor is it considered to offer a better guest experience than competitive regions in Ontario.

Durham does not currently have a product positioning statement that is used on a regular basis to differentiate local product from the competition.

Core attractions are relevant to both mass and special interest markets and have the ability to attract visitors on a year-round basis. Although they may be hosting guests from beyond Ontario's borders, for the most part, attractions are not drawing these visitors on their own; rather they are coming for other reasons, mainly visiting friends and relatives.

71% of Durham's visitation is day-trips. Some on-theme experiences are currently available however greater development in addition to more promotion and packaging are required to encourage longer stays. In addition, these experiences need to be easier for the consumer to purchase.

Durham currently attracts 90% adult-only parties despite having the product to attract more families.

Durham offers a range of cultural experiences and recent and upcoming developments and investments will increase the opportunity to offer performances by artists with name recognition beyond Durham.

Although there are restaurants located throughout the Region, there are a limited number of fine-dining opportunities. Restaurants are very important to the tourism sector and it will be important to find a way to incorporate dining opportunities into our visitor experience promotions.

There is a good range of retail shopping opportunities in the Region with some stores having name recognition beyond the local area.

A very limited number of guest surveys are implemented in Durham Region, making it difficult to determine if the Region is perceived as friendly or very hospitable and if Durham is perceived as offering value for money spent.

Durham's geographic location is an advantage. There are 5 million people within a two hour drive, an international airport within one hour and border crossings within 2 hours. Commuter routes in the GTA do impede a visitor's ability to visit with minimum discomfort, however there are various other transportation options to encourage GTA visitors. Durham is best visited by automobile so those using alternate transportation would benefit by renting a car. Transient slips at various marinas are important, however additional investment and development of marina areas is required.

A variety of accommodations at various levels of quality and price are available within Durham, however they are not well distributed geographically. Nationally branded hotel properties are located along the 401 corridor. There is a need to attract similar investment in northern areas of the Region.

PERFORMANCE

*Based on the PrTD workbook criteria, Durham Region's tourism **performance** was rated as **Partial**, meaning that it met, partially met and did not meet various performance measures outlined.*

Durham Region attracts over 3 million visitors annually, 90% of which is VFR or pleasure motivated, representing a significant share of that in Ontario. Durham captures a very limited amount of visitation from beyond Ontario's borders.

Durham's share of meetings and conventions motivated travel is extremely low. This is expected to change moving forward with the development of new conference and event facilities.

The annual average occupancy rate in fixed-roof accommodations in Durham is over 68%, based on resource audit results, with occupancy spread fairly evenly throughout the year.

Durham lags behind the provincial average for day and overnight trip spending resulting in our share of spending in the province being lower than our share of visitation.

In most cases, Durham does not rank near the top of the list of places out-of-town guests must visit however based on our share of VFR, it is important to recognize that experiences within Durham do rank as must-see to local residents.

Experiences offered in the Region have been used to promote Ontario however a more pro-active approach is required on the part of local DMOs, associations and operators to ensure that our product is known and imagery is available for use.

FUTURITY

*Based on the PrTD workbook criteria, Durham Region's tourism **futurity** was rated as **Partial**, meaning that it met, partially met and did not meet various futurity measures outlined.*

Visitation statistics collected through Statistics Canada and the Travel Activities and Motivation Survey (TAMS) indicate that there is market demand for the product offerings available in Durham Region.

There are a number of organizations including regional tourism, municipal tourism, chambers of commerce and business improvement areas developing and marketing travel related experiences in Durham Region. There is a role for all of these organizations and the exposure obtained is very important to tourism operators however there is a need to ensure that activities provide value to partners and are complimentary rather than duplicating or providing information in a way that is confusing for the consumer.

Customer service training is provided by some local operators however the Region could benefit from the development of a program that provides consistent approaches to service as well as knowledge base of front-line staff.

There are a number of capital investment projects underway at this time as well as planned for the near future that will continue to compliment as well as potentially create new core attractions. Core attractions need to continue to re-invest in programming and other improvements to enhance visitor experiences.

Tourism is positively impacting Durham's economy and quality of life. Visitor expenditures in 2004 contributed \$4.86 million in tax revenues retained in Durham. 2,558 of Durham's full-time and part-time jobs are supported by tourism. At the same time, visitation is not consuming local resources or increasing their values to a negative impact on the local economy and carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed due to destination visitation.

At this time, growth in visitation to the destination will not threaten the experience enjoyed by local residents or current visitors. Infrastructure is available to accommodate projected levels of demand and entities with approval authority locally are able to address development applications in a timely manner.

Official plans, where present, have tourism objectives in place and there is political will to move projects forward with sufficient administrative resources in place.

NEXT STEPS

In April 2006, ^{the} Tourism Company was retained to facilitate the evaluation of Durham's tourism performance against the Premier-ranked Tourist Destination Framework and to prepare a detailed 5 year strategic plan.

The strategic plan has been completed following consultation meetings with the Steering Committee, Industry Committees and tourism operators. The document titled "*A Strategy to Develop the Tourism Industry in Durham Region*" identifies strategic priorities to address key findings from this report. It integrates discussions and input from various stakeholder sessions.

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GLOSSARY

ATV: All Terrain Vehicles

B&B (B&Bs): Bed and Breakfast

BIA(s): Business Improvement Area

Chamber(s): Chamber of Commerce

CLOCA: Central Lake Ontario Conservation Authority

Core Activities: Tourists' activities as they interact with a destination's **core attraction(s)** to create **core experiences**.

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. They can overlap or be distinctly different for differing visitor segments or mass vs. specialty segments. A core attraction can also be the product of an assemblage of assets all relating to a specific theme.

Core Experience: The guest's experience of the **core attraction** or the experience that is itself the core attraction.

Chef Du Cuisine: The highest professional culinary recognition and accreditation in Canada.

CTS: Canadian Travel Survey

DC: Durham College

DMO: A Destination Management / Marketing Organization - a generic term for any agency with a mandate to promote and develop tourism in a geographic area.

DWAC: Durham West Art Centre Foundation

DTCC: Durham Trail Coordinating Committee

e TAMS: is a web tool that allows free public access to the **Travel Activities and Motivation Survey (TAMS)** — a major study that identifies existing and potential travel markets in North America and provides information on place of residence, demographics and media use of these potential visitors.

Farm Fresh: Ontario / Durham Farm Fresh Marketing Association

FIT: The Fully Independent Travel market - visitors making their own plans and travel arrangements.

George Brown: A world renowned culinary school based in Toronto (culinary diplomas and certificates).

GTA: Greater Toronto Area

GTTA: Greater Toronto Transportation Authority

High Quality Tourist Experience: A travel experience which exceeds the guest's expectations.

HRDC: Human Resources Development Canada

Hwy: Highway

ITS: International Travel Survey

Km: Kilometres

LCBO: The Liquor Control Board of Ontario

Memorable Tourist Experience: A satisfying travel experience that lasts in the guest's memory, typically because he or she was engaged in a deep and lasting (i.e., in an out-of-the-ordinary) manner by their experience of the destination.

Mosport: Mosport International Raceway

MTR: Ontario Ministry of Tourism and Recreation

National Certification: Certification allowing a chef to work anywhere in Canada.

OAAG: Ontario Association of Art Galleries

OHL: Ontario Hockey league

On-Theme Activities: Activities (uses made of features or facilities) that are related to the core attraction or the **core experience**. For example, if the core attraction is Niagara Falls, on-theme activities could be: dining with a view of the falls; a trip on the Maid of the Mist and walking the trails in the Niagara Gorge.

OPG: Ontario Power Generation

OTMPC: Ontario Tourism Marketing Partnership Corporation- An agency of the Government of Ontario. The partnership between the provincial government and the tourism industry responsible for marketing tourism in and to Ontario.

Parkwood: Parkwood Estate, The R.S. McLaughlin Estate

PGA: Professional Golfers' Association

Product Positioning Statement: A brief description of what a product or service does, and its benefits using terms which set it apart from its competitors.

PrTD: Premier-ranked Tourist Destination

Receptive Tour Operator: A travel operator who specializes in packaging travel to the market area in which it is situated, for sale generally to visitors from other geographic market areas; an important resource in understanding market perceptions, needs and opportunities in a destination area.

Red Seal: Inter-provincial standard of National training and certification, allowing a chef to work anywhere in Canada.

Regional Complex: A term describing the situation in which individual tourism resources in an area are not sufficiently attractive to draw significant tourist visitation by themselves, but as a group attract visitation by virtue of complementing one another and creating a larger whole.

ROI: Return on Investments

RV(s): Recreational Vehicle

Special Interest (Niche) Segments: Smaller market segments with a travel-motivating interest in a particular type of experience, e.g., a specific interest in good boardsailing opportunities vs. the mass market interest in a more generic sun and sand destination.

Supporting Attraction: These are features or facilities that draw guests to the destination area, by giving additional but secondary reasons to travel there; Supporting attractions can be primary travel motivators (i.e. **core attractions**) to some markets (typically **specialty segments**). They are generally distinguished from core attractions by their smaller number of visitors.

Travel Activities and Motivation Survey (TAMS) — a major study that identifies existing and potential travel markets in North America and provides information on place of residence, demographics and media use of these potential visitors.

Travel Agent: An individual or firm licensed under the Travel Industry Act to offer travel advice and bookings; an important resource in developing packaged travel opportunities in a destination area.

U-Pick (you-pick): Pick your own produce farm and/or farm market

UOIT: University of Ontario Institute of Technology

U.S. /U.S.A: The United States of America

VFR: Visiting friends and relatives - an important motivator for tourism travel.

VIA: VIA Rail

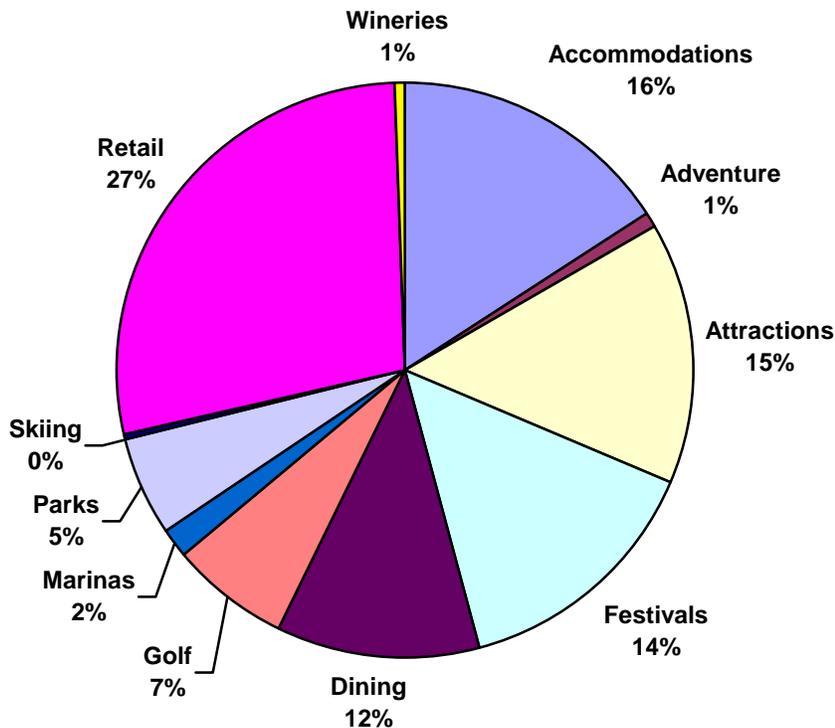
APPENDICES

APPENDIX 1.0 RESOURCE AUDIT RESULTS

Resource Audit Results

	Core	Accommodations	Adventure & Outfitters	Attractions	Festivals & Events	Dining	Golf	Marinas	Parks & Trails	Retail	Skiing & Snowboarding	Tours & Excursions	Wineries & Breweries	Total Sector Specific Surveys
(A) Total Surveys Distributed	876	97	17	90	69	351	47	11	26	213	4	0	3	928
(B) Number of Businesses Closed	60	8		7		10	1	1		31				58
(C) No Tourism Impact Indicated	236			10		216		1		20				247
(D) True Survey Quantity (A=B=C)	580	89	17	73	69	125	46	9	26	162	4		3	623
(E) Completed Surveys Returned	436	75	5	70	68	55	32	8	26	133	2		3	477
(F) Refused To Complete	12	5	1	1			2			2				11
(G) No Response	132	9	11	2	1	70	12	1		27	2			135
PERCENTAGE RECEIVED (E÷D)	75	84	29	96	99	44	70	89	100	82	50		100	77

Durham's Sector Representation by Surveys Returned



APPENDIX 2.0 TRANSPORTATION AND TRAVEL TRADE RESOURCES CHECKLIST

Transportation Resource Checklist

Yes No

- | | | | |
|----|--|-------------------------------------|-------------------------------------|
| 1. | The destination has at least one easily accessed Visitor Information Centre, | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | a. on a major transportation route. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | b. With clear and frequent directional signage | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 2. | Major tourist transportation routes to downtown(s) have frequent directional signage, | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | a. well-maintained road surfaces | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | b. attractively maintained public spaces | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3. | Transportation routes to major attractions have frequent directional signage, | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | a. well-maintained road surfaces | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | b. attractively maintained public spaces | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4. | Shuttle services or taxis and Tourist orientation information are available at transportation terminals | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5. | Tourist traffic congestion and way-finding problems are addressed by transit-based interventions, e.g., municipal transit, shuttle services, People Movers, satellite parking. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 6. | Transit services to core attractions have schedules that accord with attractions' hours of operation. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 7. | a. Taxi drivers have been given service delivery training | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | b. Taxi drives have been given a briefing on tourist attraction locations | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 8. | All attractions serving the coach tour market have sufficient on-site bus parking, or there is convenient access to a bus parking/staging area. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Travel Trade Resource Checklist

Yes No

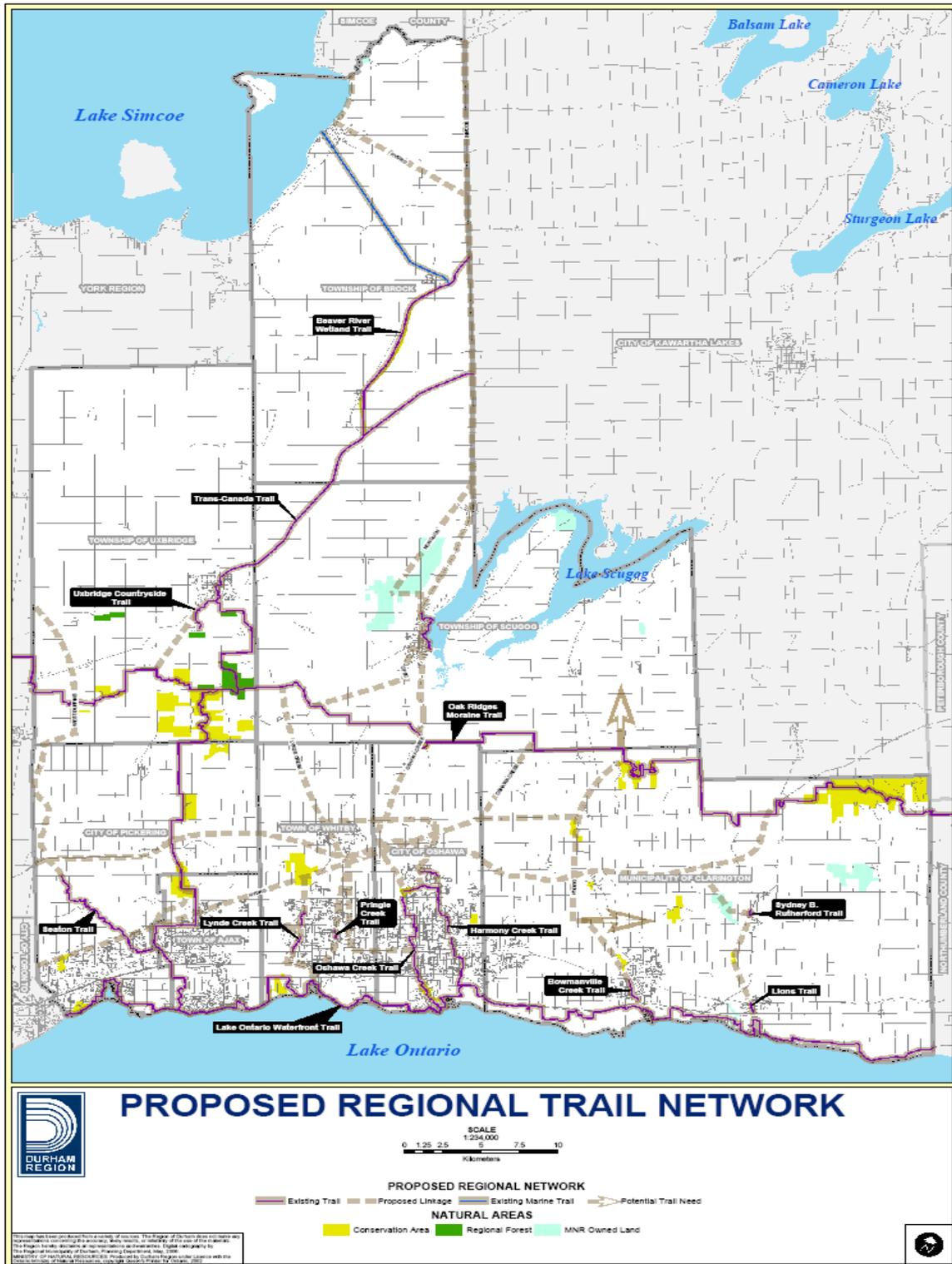
- | | | | |
|----|---|-------------------------------------|--------------------------|
| 1. | A complete inventory of receptive tour operators bringing coach or FIT travel to the destination. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2. | Receptive tour operators have been contacted to identify: | | |
| | a. The attractions, accommodations and other facilities visited, and visitation volumes; | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | b. issues e.g., parking, that impair visitation or the visitor experience; | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | c. opportunities to improve the visitor experience and increase visitation; and | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | d. other assets that, with additional investment, could attract group tour visitation. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3. | A local receptive tour operator sits on a Workbook implementation committee. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4. | A complete [smaller areas] or comprehensive cross sectional [larger centres] inventory of local travel agents serving clientele resident in the destination area has been compiled. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5. | Travel agents have been contacted to determine: | | |
| | a. their perceptions of opportunities to package travel experiences within the destination area; | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | b. their interest in packaging travel experiences within the destination area; | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | c. their perceptions of opportunities to improve the visitor experience and increase visitation to the area | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 6. | A local travel agent sits on a Workbook Implementation Committee | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

APPENDIX 3.0 PERFORMANCE SUMMARY PREMIER-RANKED TOURIST DESTINATION

PRODUCT	PERFORMANCE	FUTURITY																																																																		
A. Distinctive Core Attractions - ▸																																																																				
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LEGEND
● Yes
▸ Partial
○ No
? Unsure

APPENDIX 4.0 PROPOSED REGIONAL TRAIL NETWORK MAP



APPENDIX 5.0 LIST OF TOURISM RELATED HERITAGE SITES IN DURHAM

National Historic Sites

Parkwood, The R.S McLaughlin Estate
The Trent-Severn Waterway

Local Heritage (Designated) Sites

Uxbridge Heritage Centre
Cannington Centennial Museum
Bowmanville Museum
Clark Museum and Archives
Oshawa Community Museum & Archives
Head Church & Cemetery at Scugog Shores Historic Museum
The Thomas Foster Memorial
Uxbridge Music Hall
Uxbridge Library
Uxbridge Railway Station
The Regent Theatre
Orono Town Hall
Town Hall 1873
Former Palmer House
Lanark Farm
Centennial Building Whitby
The Station Gallery
Cream of Barley Mill / The Visual Arts Centre of Clarington
James Rowe House
Sunderland Town Hall
James Rowe House
Hamlet of Cherrywood
Hamlet of Whitevale
Pickering Village
Tyrone Mills
Clark Museum and Archives
Hobby Horse Restaurant, Uxbridge
Pizza Pizza, Uxbridge

Archives

Scugog Shores Historical Museum Village & Archives
Uxbridge Historic Centre
Clark Museum & Archives
Oshawa Community Museum & Archives
Whitby Archives (2 locations)
Sunderland and District Historical Museum
Clarington Museum and Archives

Living History Site

Scugog Shores Historical Museum
Pickering Village Museum this Museum which is a small village offer interpretive programs, has its own theatre group and hosts various seasonally appropriate events as well as may interactive activities for children
Spirit Walk this is an historic re-enactment hosted from PVM
Beaverton River Museum

Provincial Heritage Sites

Lucy Maud Montgomery / Manse
Trafalgar Castle (plaque) located in Whitby is an all girls school and is home to The Driftwood Theatres Trafalgar 24 an annual theatre event, and the location of Outdoor Theatre performances, by the same group.
Uxbridge Train Station located in Uxbridge was built in 1904.

Local Heritage Sites (Significant)

Uxbridge Quaker Meeting House
Pine Grove Church
Glen Major Church
Sunderland Museum
The Robert McLaughlin Gallery
The Canadian Automotive Museum
The Robert Stuart Aeronautical Museum & Camp X
The Oshawa Aeronautical Military & Industrial Museum
Tyrone Mill 1848
Airmen Park
Union Cemetery
Pickering Museum Village
Whitby Museum
Downtown Whitby
Downtown Bowmanville
Downtown Uxbridge
Downtown Port Perry
Beaverton Town Hall
Marc Barrie Gallery
Herongate Dinner Theatre

Architectural Heritage Sites

Parkwood, The R.S. Mc Laughlin Estate
Beaver River Museum
Oshawa Community Museum & Archives
Scugog Shores Historical museum
Uxbridge – Scott Museum & Archives
Cannington Centennial Museum
Bowmanville Museum
The Robert McLaughlin Gallery
Thomas Foster Memorial
Clarke Museum & Archives
Pickering Museum Village
The Station Gallery
Visual Arts Center of Clarington
Uxbridge Music Hall
Uxbridge Library
York Durham Railway Station
Queen St Port Perry
Cochrane St Port Perry
Hamlet Blackstock Core
Green Back Hall
Hamlet of Prince Albert Core
Seven Mile Island
Ocala Winery
Downtown Whitby
Downtown Bowmanville
Downtown Uxbridge
Downtown Port Perry
Hamlet of Whitevale

APPENDIX 6.0 RESOURCE OPPORTUNITY MATRIX

TOURISM RESOURCE / OPPORTUNITY MATRIX			OPPORTUNITIES							EXISTING MARKET			
			Count	Resource Opportunities	Core Attractions	Supporting Attractions	On-Theme Activities	Underdeveloped Assets	Group Travel	Packaged	Regional	Provincial	National/Int'l
TOURISM RESOURCES – BUILT / MANAGED													
Natural Resource Opportunities	Natural Parks and Sites	National											
		Provincial	1	○		▼				◐	●	○	
		Crown Land	1										
		Conservation Areas	30	●		▼		▼	▼		●	◐	○
		Reserves	12	◐							●	○	○
		Interpretive Programs / Walks / Tours	11	◐							●	◐	○
Cultural and Heritage Resource Opportunities	Historic Places and Sites	World Heritage Site	0										
		National Historic Site	4	●	▼	▼	▼	▼		●	◐	○	
		Provincial Heritage Site	29	●	▼	▼	▼	▼	▼	●	◐	○	
		Local Heritage Site	24	●		▼			▼	▼	●	◐	○
		Aboriginal / Heritage Site	4	○							●	◐	
		Living History Site	4	◐		▼	▼		▼		●	◐	
		Heritage Gardens	10	◐		▼	▼	▼	▼	▼	●	◐	
		Folklore Site	0										
		Architectural Heritage Site	28	◐		▼	▼		▼	▼	●	◐	○
		Cultural/Historic Landscape	8	○		▼			▼		●	◐	
		Cultural/Historic Travel Corridor	1	○				▼			●	◐	
		Interpretive Programs/Walks/Tours	11	○		▼	▼	▼	▼	▼	●	◐	
		Archaeological Attractions	Public Digs										
	Shipwreck Interpretive Tours/Dives												
	Interpretive Programs/Walks/Tours		3								●	◐	
	Cultural Attractions	Aboriginal Pow Wows/Celebrations	1	○		▼			▼		●	◐	○
		Archives	7	◐							●	◐	○
		Annual Musical Festivals	10	◐		▼	▼	▼	▼		●	◐	○
		Annual Non-Musical Festivals	90	●		▼	▼	▼	▼		●	◐	○
		Special Events/Celebrations	26	○		▼	▼				●	◐	○
		Crafts Events	6						▼		●	◐	
		Museums	19	●		▼	▼	▼	▼		●	◐	○
		Galleries - Private	8	○		▼	▼		▼		●	◐	○
		Galleries - Non Profit	5	◐		▼	▼	▼	▼		●	◐	○
		Large Scale Theatre											
		Studio/Garden/Architecture Tours / Walks-Events	21	◐		▼	▼	▼	▼		●	◐	○
		Art Events	19	◐		▼	▼	▼	▼		●	◐	
		Live Theatre - Performers	6	◐		▼			▼	▼	●	◐	
		Live Theatre	5	◐		▼			▼	▼	●	◐	○
	Live Music - Performers	19	◐		▼	▼	▼	▼		●	○		

		Live Music	9	○							●		
		Performing Arts Venues	5	○		✓					●	◐	
		Other Performing Arts Venues/Events - Non-Profit											
		Active Street Scenes											
Built Recreational / Commercial Infrastructure	Sports Venues / Events	Playing Field Complexes	60								●	◐	
		Swimming/Diving Complexes	10								●	◐	
		Arena Complexes	16								●	◐	
		Community Hall	48								●	◐	
		Equestrian Facilities	9	◐				✓	✓		●		
		Major League Franchise Venues	0										
		Minor League Franchise Venues	1			✓			✓		●	◐	
		Significant Sports Events	15	●		✓	✓		✓	✓	●	◐	
		Annual/Recurring Tournaments	8			✓	✓		✓		●	◐	○
		Skydiving									●	◐	
		Recreation Centre	24	○				✓			●	◐	
		School/University Facilities	1								●	◐	○
		Sport Club/Organization											
		Recreational / Resort Developments	Ski Development - Alpine	5	◐		✓	✓	✓	✓		●	◐
	Ski Development - Cross Country		21	●		✓	✓	✓			●	◐	
	Marina - Boating Developments		15	●		✓	✓	✓			●	◐	
	Golf Courses		46	●	✓	✓	✓		✓	✓	●	◐	
	Attractions	Amusement/Theme Park - Outdoor	1	○				✓			●		
		Amusement/Theme Park - Indoor	3	○				✓			●		
		Commercial Events	16	○		✓			✓		●	◐	
		Water Park/Wave Pool	1				✓				●	◐	
		Observations Sites - Indoor											
		Observations Sites - Outdoor											
		Horse Racing	1	○		✓			✓		●	◐	
		Casino/Gaming	2	◐	✓	✓		✓	✓	✓	●	◐	
		Zoo/Game Farm/Animal Farm	8	●		✓		✓	✓	✓	●	◐	○
		Motor sports Venues	1	◐	✓	✓			✓	✓	●	◐	○
		Floral/Other Garden Attractions	17	○		✓	✓	✓	✓		●	◐	
		Farmer's Markets	5	●		✓			✓		●	◐	
		Farms / Orchards	54	●		✓		✓	✓		●	◐	○
		Winery/Brewery	3	○		✓		✓	✓	✓	●	◐	○
		Commercial Venues	Theme Retail	46	●		✓	✓				●	◐
	Factory Outlet/Shopping Mall		6	●		✓					●	◐	
	High-End Shopping		12	○		✓					●	◐	○
	Antiques Shopping		27	◐		✓			✓		●	◐	○
	Arts & Crafts Shopping		58	◐		✓		✓	✓		●	◐	○
	Downtown Shopping		89	●	✓	✓	✓	✓	✓		●	◐	○
	Day Spas		13	◐		✓		✓			●	◐	
	Dining - Café		42	◐		✓		✓			●	◐	
	Dining - Fast Food		853	●		✓					●	◐	
Dining - Mid-Price	18								✓	●	◐		
Dining - High-End	35	◐		✓	✓	✓			●	◐			

		Banquet Hall	23	●		✓			✓		●		
		Brew Pubs	30	●		✓					●		
		Entertainment	30	●		✓		✓			●	●	○
		Night Life	5								●	●	
		Tour Operators	2								●		
		Travel Agents	62	●							●		
		Bars	67	●		✓					●		
	Accommodations	Campground	13	●		✓	✓		✓		●	●	
		RV Campgrounds	13	●		✓	✓		✓		●	●	
		Cottage Court											
		Bed and Breakfast	48	●		✓		✓			●	●	●
		Lodge											
		Resort Lodge											
		Eco-Lodge											
		Condominium											
		Condo/Hotel											
		Vacation Rental											
		Spa	1	○		✓		✓	✓	✓	●	●	○
		Motel - Mid-Market	14	●					✓	✓	●	●	●
		Motel - Up-Market											
		Hotel - Mid-Market	11	●					✓	✓	●	●	●
		Hotel - Up-Market											
		University & College Residence	1	○					✓		●	●	
		Hostel											
		Conference/Convention Centre	20	●					✓		●	●	
		Mid-Scale Meetings Facilities	15	●					✓		●	●	○
		Small-Scale Meetings Facilities	28	●					✓		●	●	●
	Transportation	Airport	1										
		Rail	2										
		Bus	4										
		Taxi	21										
		Car Rental	12										
Limousine		20											
Other													
Other Tourism Resources	Chamber of Commerce	9											
	Travel Information Centres	8											
	Currency Exchange												
	Other Tourism Resources												
TOURISM RESOURCES – NATURAL													
	Swimming	Beaches	13	●		✓	✓	✓	✓		●	●	
		Other Venues											
	Fishing	Sport fishing	13	○		✓	✓	✓			●	●	
		Ice fishing	7	○		✓	✓	✓			●	●	
	Boating	Sight Seeing Cruises - Day	1	○		✓	✓	✓			●	●	
		Sight Seeing Cruises - Overnight											
		Sailing	20	●		✓	✓	✓			●	●	
Power Boating/Touring	18	●		✓	✓	✓			●	●			

		Board Sailing													
		Sail/Power Boat Charters													
		Boat Launch Ramps	18	◐		✓	✓	✓				●	◐		
		Water Skiing	18	◐		✓	✓	✓				●	◐		
		Canoeing/Kayaking - Flat-water	18	◐		✓	✓	✓				●	◐		
		Canoeing/Kayaking - Whitewater													
		Ice Boating													
		Rafting													
		Scuba / Snorkeling													
		Land Based Recreation Opportunities	Hunting	Big Game	2			✓						●	
Small Game	3					✓						●	◐		
Water Fowl	1														
Camping	Auto Touring														
	Bicycle Touring		31												
	Wilderness Trail		59												
	Wilderness Canoe/Kayak														
Trails	Day Hiking		59										●	◐	
	Snowshoeing		16										●	◐	
	Cross Country Skiing		19										●	◐	
	Mountain Bike		33				✓						●	◐	
	Road Bike Routes		26				✓			✓			●	◐	
	Equestrian Trails		5				✓						●	◐	
	Snowmobile Trails		3				✓						●	◐	
	All Terrain Vehicle Trails		1				✓						●	◐	
Rock Climbing															
Cave Exploring															
Land and Water Based Opportunities	Viewing Natural Attractions	1													
	Bird watching	1													
	Waterfalls														
	Photography/Painting														
	Travel Touring Corridors	Rail													
		Boat													
Car															

LEGEND

OPPORTUNITIES	MARKET
● Abundant	● Strong
◐ Moderate	◐ Moderate
○ Limited	○ Limited
No Resource	No Usage

APPENDIX 7.0 TOURISM INVESTMENT IN DURHAM REGION

RECENT INVESTMENTS

Ajax Slots at Picov Downs

Over 200 slot machines opened in the spring of 2006.

New Legends Centres

Opening in phases starting in late 2005 through 2006. Legends Centre is a \$39 million facility that includes 4 NHL size ice pads, leisure pool and waterslide, library, senior's centre, gymnasium, leisure room, indoor track, multi-purpose rooms, fitness centre, outdoor amenities, concessions.

Hilton Garden Inn Ajax

Phase 1 opened in spring 2006 - 134 rooms and 3,000 square feet of meeting space. Future expansion (2007 / 2008) includes:

- o Phase 2: 19,000 square foot convention centre
- o Phase 3: 80 suites for extended stay (Hilton Homewood Suites)

University of Ontario Institute of Technology

Over 4,300 students are enrolled at UOIT for the 2006-2007 academic year. Enrolment is expected to rise to 6,500 students by 2010. International students make up more than five per cent of the university's student body, coming from over 30 countries. As Ontario's only laptop-based university, UOIT uses the latest technology to enhance learning. UOIT uses one of the world's largest geothermal well fields to help heat and cool its buildings. Made up of 384 holes drilled 213 metres (700 feet) into the ground, the sophisticated system takes advantage of the earth's relatively constant temperature to provide a stable, low-maintenance and efficient energy source.

The Granite Club Golf Course in Uxbridge

Located Durham Road 30 near Stouffville Sideroad, Granite Golf sits on 300 acres of property, on Reesor Creek in the Township of Uxbridge. The course was designed by Thomas McBroom. Mr. McBroom has designed such notable courses as Barrie National Pines, The Links at Crowbush Cove, Beacon Hall and The Lake Joseph Club. There will be an emphasis on the highest quality professional teaching for every level of golfer, from Junior to Senior.

Garnet B Richard Recreation Complex Hockey Museum

This \$1.8 million facility opened in the fall of 2006. An educational experience showcasing almost 1,300 artifacts in the collection of Brian McFarlane, long-time Hockey Night in Canada commentator, and Peter Puck creator.

EXPECTED INVESTMENTS WITHIN 2 YEARS

Wyndance Golf Club in Uxbridge

Target completion: summer 2007. Featuring 9 and 18 hole courses. An expanded club house, with restaurant, outdoor patio, bar, and meeting facility. Wyndance will also feature 125 estate homes nestled within the course itself.

R. S. McLaughlin Durham Regional Cancer Centre

New Cancer Center at Lakeridge Health Corporation located at Oshawa General Hospital, a \$103 million project. Projected occupancy date is 2007. The catchment area for the R. S. McLaughlin Durham Regional Cancer Centre includes the counties of Durham, Haliburton, Hastings, Northumberland, Peterborough and Victoria and part of Metropolitan Toronto. Our catchment area will have a population base of 3.193 million. (Based on 1991 Census)

General Motors Centre

This \$45 million facility in downtown Oshawa opened in November 2006. Managed by Maple Leaf Sports and Entertainment, the facility will regularly host a variety of sports and entertainment events that will appeal to the community as a whole. Spectator capacity of about 5,400 for ice events and 6,400 for concerts. This is the new home for the Oshawa Generals with 23 private suites, a restaurant/bar with street access, the Oshawa Sports Hall of Fame, a pro-shop, an outdoor plaza that will host pre and post events/activities, and an outdoor area for stage events and promotional opportunities. A fountain and reflecting pool by summer will, in winter, convert to an outdoor ice rink for use by the community.

Second Marsh's Great Lakes Wetland Centre

The estimated cost of constructing the Centre is over \$7 million. Construction of the Great Lakes Wetlands Centre is scheduled for late 2006 with the Centre estimated to open in the fall of 2007. The 30,000 square foot facility will include a large viewing deck, permanent display space with state-of-the-art exhibits, Ornithological Hall of Fame, auditorium, classroom and meeting space, licensed restaurant, research facility and library, and gift shop. Proposed building to be erected on the 5 acres of land in Oshawa donated by General Motors of Canada.

Port Perry Accommodation

As of March 2006, at Scugog council to consider official plan amendment and zoning by-law amendment. The \$100 million plan includes a 150 unit residential component (including fractional ownership, second homes), an 80 suite hotel with banquet facilities (negotiating with Marriott), and an arts centre, pool, spa and retail uses complex. Proposed development consists of 57 acres and ½ mile of waterfront and will include a trail system linking the resort to Port Perry

EXPECTED INVESTMENTS IN 2 - 5 YEARS

The Regent Theatre Renewal Project

Opening in downtown Oshawa in 2008. This 700+ seat facility will host over 200 events per year including live performances by nationally renowned artists, theatrical productions, school concerts, children's programs and corporate functions with state of the art technology.

Durham's Regional Cycling Plan

A Region-wide, visible and connected network of on and off road cycling routes and facilities that will be actively used by all types of cyclists. It will be designed to connect cities, towns, villages, and hamlets as well as key attractions and destinations in Durham. The plan will be implemented over a 25 year period, and

may be broken into short and long term phases. Short term implementation may occur over the next 2 to 5 years.

New Provincial Courthouse

Located in Downtown Oshawa, this 360,000 square foot courthouse with 1800 daily visitors conducting business. The project will assist in rejuvenating the downtown core by increasing the demand for office space, restaurant meals and other services in the area. Expected completion is early 2009.

EXPECTED INVESTMENTS IN 5+ YEARS

Durham West Arts Centre Foundation (Regional) Arts Centre

DWAC formed under a two-year pilot project to grow support for a permanent performing arts centre for Durham West.

Regional Trail Network

Expand, enhance and promote a public regional trail system connecting the Region of Durham's municipalities (including key destination points) that will support active and healthy community lifestyles. At the time of this report, a timeline for completion has not been established.

Highway 407 to Highway 35/115 Expansion

An Environmental Assessment is presently being conducted for the proposed expansion of Highway 407 to Highway 35/115, with two high-speed freeway connections to Highway 401. The extensions of Highway 404 into Durham and related improvements to Highways 48 and 12/48 would provide economic and social benefits for the Region's northern areas. These projects are proposed to be complete by 2021. Stevenson Road and Lakeridge Road Exchanges at Highway 401 are also expected.

Pickering Airport

Review of business case and potentially an Environmental Assessment on the proposed sub-regional airport in Pickering.

Greater Toronto Transportation Authority (GTTA)

The Ministry of Transportation is working with nine transit agencies to implement a GTA fare card system (including Brampton Transit, Burlington Transit, Durham Region Transit, Go Transit, Hamilton Street Railway, Mississauga Transit, Oakville Transit, Toronto Transit Commission, York Region Transit). Planning has been completed, business requirements have been developed and the design of the system has been finalized. A competitive search is underway for a vendor who will implement the system. An announcement of the successful vendor will be made in the near future. Implementation will begin early 2007 and be fully in place across the GTA, from Hamilton to Oshawa, by 2010.