Tourism Advisory Committee
November 1, 2018 – 9:00 AM
Heritage Room, Grey County Administration Building

1. Call to Order

2. Declaration of Pecuniary Interest

3. Reports
   a. CAOR-TAC-23-18 Tourism Destination Development Action Plan Priorities for 2019
      That Report CAOR-TAC-23-18 be received and that the Priorities for 2019 under the Tourism Destination Development Action Plan be supported.
   b. CAOR-TAC-24-18 Tourism Advisory Committee Terms of Reference
      That Report CAOR-TAC-24-18 regarding revised Terms of Reference for the Tourism Advisory Committee be received; and
      That the revised Terms of Reference for the Tourism Advisory Committee as attached to Report CAOR-TAC-24-18 be endorsed.


5. Grey County Tourism Updates
   a. Partner Criteria
   b. 2018 Colour It My Way Campaign
   c. Updated Metrics Backgrounder

6. Cycling and Trails Master Plan Verbal Update

7. Municipal Accommodation Tax (MAT) Verbal Update


9. Other Business
10. Next Meeting Dates
   a. To be determined

11. Adjournment
Committee Report

To: Chair Gingras and Members of the Tourism Advisory Committee

Committee Date: November 1, 2018

Subject / Report No: CAOR-TAC-23-18

Title: 2019 Tourism Destination Development Action Plan Priorities

Prepared by: Bryan Plumstead

Reviewed by: Kim Wingrove

Lower Tier(s) Affected:

Status:

Recommendation

1. That Report CAOR-TAC-23-18 be received and that the Priorities for 2019 under the Tourism Destination Development Action Plan be supported.

Executive Summary

Grey County’s Tourism Destination Development Action Plan is half-way through its mandate, about two and a half years with an equal time remaining. The Action Plan confirmed Grey County Tourism’s existing goal to “Increase sustainable tourism revenues through managing and marketing Grey County as a tourism destination”.

Background and Discussion

Key accomplishments in 2018 included:

- creating a Marketing Strategy
- assisting with the Great Lakes Waterfront Trail through Grey County
- assisting with implementation of OMCC (Ontario Municipal Commuter Cycling) funded projects including purchase of five cyclist counters, and initiation of a Cycling and Trails Master Plan
- another successful ColourItMyWay campaign
- working with Blue Mountain Village Association and regional partners on an attainable housing strategy for South Georgian Bay.
Ongoing activities include:

- hosting five “Let’s Talk Tourism” industry sessions
- hosting 6 media visits
- regular industry and visitor communication and marketing activities
- updating Grey County’s tourism performance and metrics measures
- directing our summer students in visiting over 40 events, delivering tourism materials and conducting our most active and engaging summer social media presence to date

Priorities for 2019

Successful implementation of the Action Plan’s proposed activities will result in tourism growth and value, and the development of a strong, collaborative tourism community in Grey, further solidifying its reputation as a destination of choice in Ontario. The chart below highlights the phasing of activities.

**Pillar 1: Stakeholder Engagement**

Research indicated that stakeholders are keen to hear from Grey County often and seek greater opportunities for networking with industry peers. The County’s role is to facilitate collaboration between stakeholders and ensure stakeholders are well informed of County activities.

Recommendations for 2019

In consultation with industry partners, implement market-ready criteria which provide Grey County tourism industry with “best practice” criteria to maintain a competitive approach in today’s global marketplace. Continue to deliver timely and relevant industry education and networking sessions. Continue to improve the industry newsletter to include timely editorial features on key topics. Updating the industry website is planned to coincide with work on the consumer site.

Objective: To create a collaborative tourism community in Grey County.

<table>
<thead>
<tr>
<th>Key Activities</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement market-ready criteria for tourism industry</td>
<td>Provide “best practice” criteria to maintain a competitive approach in today’s global marketplace and increase consumer confidence.</td>
</tr>
<tr>
<td>Continue “Tourism Talks”</td>
<td>Bi-Monthly networking events that benefit all stakeholders.</td>
</tr>
<tr>
<td>Update Stakeholder Communications</td>
<td>Provide a steady flow of valuable news and information.</td>
</tr>
<tr>
<td>Make the industry website a useful tool and resource</td>
<td>Updated site navigation and content.</td>
</tr>
</tbody>
</table>
Pillar 2: Destination Development

At the core of the Action Plan is the product development and marketing of Grey County that differentiates the County from its competition. Grey County Tourism’s marketing strategy brings the brand to life through innovative marketing and communications channels, including #ColourItMyWay, a visiting friends and relatives (VFR) campaign. The Action Plan recommends coordinating product and experience development that is in line with market needs through identification of key experiences.

Recommendations for 2019

The ColourItMyWay summer and fall campaign continued to be very successful in telling the stories of our “ambassadors” to build community engagement and pride. A new component in 2018 was the introduction of two Grey County “Insiders” who focused on our tourism assets with their insights. Staff are looking at expanding this part of the campaign to feature more “places” in 2019 to complement the “people” that currently comprise our campaign and also plan better integration of our media relations. Working with our municipal DMO partners, we would like to initiate a communications campaign to highlight the importance and benefits of tourism in our local communities and economy. Visitgrey.ca is now three and a half years old, and in need of a facelift to keep up with today’s social media and mobile-driven standards. This includes bringing social media onto the front page, more video and story-telling. This is a capital project funded from reserve and estimated at $20,000.

Development of packages and itineraries will focus in three themes: outdoor adventure (including cycling) food/culinary and arts and culture. Outcomes from the Cycling and Trails Master Plan will also drive development activities in 2019. Some of these include: identifying key cycling routes for infrastructure investment including signage, and identifying key trails for inclusion in a Grey County Trails guide. Also new for 2019 is to begin looking at US and overseas markets for a partnered or direct approach.

Objective: To increase the competitiveness of Grey County as a tourism destination.

<table>
<thead>
<tr>
<th>Key Activities</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanding #ColourItMyWay campaign</td>
<td>Campaign to leverage the many relatives and family friends who visit Grey County and to motivate our potential visitors</td>
</tr>
<tr>
<td>Closer integration of media and influencers with campaign.</td>
<td>Reinforcement of campaign through external channels</td>
</tr>
<tr>
<td>Update visitgrey.ca – mapping, mobile-friendly</td>
<td>Robust information portal for travel consumers to use pre-trip and in-market</td>
</tr>
<tr>
<td>Facilitate Creation of Packages and Itineraries</td>
<td>Development of experiences under broad themes with itineraries/packages</td>
</tr>
<tr>
<td>Create a Simple Experiential Outbound</td>
<td>Increased US/overseas market exposure</td>
</tr>
</tbody>
</table>
Key Activities | Results
---|---
Tour Operator Strategy | and interest by tour operators

**Pillar 3: Market Research and Tracking**

The Action Plan is measurable. The scorecard identifies key performance indicators and data sources for Grey County Tourism to measure its success on an on-going basis and compare annually. Besides measuring the progress of the Action Plan, the report recommends surveying industry on an annual basis to develop a snapshot of the ‘State of Tourism in Grey’ and sharing that data with stakeholders.

Recommendations for 2019

A tourism metrics workshop is scheduled for mid-November to share existing research and metrics and obtain input for business and partner needs going forward. Outcomes will inform the business survey to go out before the end of 2018. The Research and Data Analyst project has been rescheduled and budgeted for 2019.

Objective: To measure the Action Plan and provide strategic data to stakeholders.

<table>
<thead>
<tr>
<th>Key Activities</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track success of the Action Plan</td>
<td>Quarterly scorecard circulated to Tourism Advisory Committee and annual report to County Council.</td>
</tr>
<tr>
<td>Track key quantitative and qualitative metrics and economic impact of tourism</td>
<td>Dashboard on the state of tourism produced based on available data and industry surveys</td>
</tr>
<tr>
<td>Create profiles of target market audience groups (demographics/psychographics)</td>
<td>Provide tools to stakeholders to help them target their marketing</td>
</tr>
</tbody>
</table>

**Pillar 4: Resource Allocation**

Grey County Tourism has a dedicated team, and investing in their professional development should be a priority.

Recommendations for 2019

The tourism department experienced some changes in staff in 2018. All staff develop work plans that align with Grey County’s four seasons and provide feedback on Action Plan deliverables as well as ongoing service delivery. The team also identifies training needs required to meet Action Plan objectives.

Objective: To create the most effective tourism team at Grey County.

<table>
<thead>
<tr>
<th>Key Activities</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>All staff complete annual work plans with</td>
<td>Create the most effective structure able</td>
</tr>
</tbody>
</table>
Key Activities

<table>
<thead>
<tr>
<th>quarterly deliverables and metrics.</th>
<th>to support stakeholders and Grey County's strategic initiatives.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invest in professional development</td>
<td>Ensure staff is always on top of the trends</td>
</tr>
</tbody>
</table>

(Every effort has been made to ensure this document is accessible in accordance with the Ontarians with Disabilities Act, 2001 (ODA) and the Accessibility for Ontarians with Disabilities Act, 2005 (AODA). To request this information in an alternate format, please contact Rob Hatten at Robert.Hatten@grey.ca or 519-372-0219 ext. 1235.)

Grey County Tourism Priority Calendar for DDAP - 2019

<table>
<thead>
<tr>
<th>Priority Levels:</th>
<th>Year 3 - 4: 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Level</td>
<td>Q1: Jan-March</td>
</tr>
<tr>
<td>Pillar 1: Community Engagement</td>
<td></td>
</tr>
<tr>
<td>1. Clean Up and Maintain the Grey County Tourism Stakeholder Database</td>
<td>1</td>
</tr>
<tr>
<td>2. Build Stakeholder Communications Plan - ongoing Communication</td>
<td>2</td>
</tr>
<tr>
<td>3. Relaunch &quot;Tourism Talks&quot; - ongoing sessions</td>
<td>2</td>
</tr>
<tr>
<td>4. Make the Industry Website a Useful Tool and Resource</td>
<td>2</td>
</tr>
<tr>
<td>Pillar 2: Destination Management</td>
<td></td>
</tr>
<tr>
<td>1. Create Marketing and Communications Plan - update for 2019</td>
<td>1</td>
</tr>
<tr>
<td>2. Embrace the Brand</td>
<td>2</td>
</tr>
<tr>
<td>3. Create a Visiting Friends and Relatives (VFR) Marketing and Communications Campaign - update campaign for 2019</td>
<td>2</td>
</tr>
<tr>
<td>4. Create a Grey County Tourism Mobile Application - Update Website</td>
<td>3</td>
</tr>
<tr>
<td>5. Facilitate Creation of Packages &amp; Itineraries</td>
<td>4</td>
</tr>
<tr>
<td>6. Create a Simple Experiential Outbound Tour Operator Strategy</td>
<td>4</td>
</tr>
<tr>
<td>Pillar 3: Market Research and Tracking</td>
<td></td>
</tr>
<tr>
<td>1. Track the Success of the DDAP</td>
<td>1</td>
</tr>
<tr>
<td>2. Track Key Quantitative and Qualitative Metrics and Economic Impact of Tourism</td>
<td>2</td>
</tr>
<tr>
<td>3. Create Profiles of Target Market Audience Groups Using Both Demographics and Psychographics</td>
<td>3</td>
</tr>
<tr>
<td>Pillar 4: Resource Allocation</td>
<td></td>
</tr>
<tr>
<td>1. Reorganize Tourism Staff Functions</td>
<td>1</td>
</tr>
<tr>
<td>2. Invest in Professional Development</td>
<td>3</td>
</tr>
</tbody>
</table>

Legal and Legislated Requirements

None.

Financial and Resource Implications

Implementation of the Tourism Action Plan is contained within the proposed budget and staffing allocations for 2019.
There are also some recommendations that involve information technology (IT) and may involve a combination of use of County IT staff where possible and some outside resources. The largest impact is the updating of visitgrey.ca and ensuring continued mobile compatibility. Further research will be undertaken to determine the scope, costs and ability of the IT department to do this work. This is a capital project funded from the tourism reserve and estimated at $20,000, with no net budget impact.

Relevant Consultation

☑ Internal – CAO
☐ External – none

Appendices and Attachments

None.
To: Chair and Members of Tourism Advisory Committee

Committee Date: November 1, 2018

Subject / Report No: CAOR-TAC-24-18

Title: Tourism Advisory Committee Revised Terms of Reference

Prepared by: Bryan Plumstead, Manager of Tourism

Reviewed by: Kim Wingrove, Chief Administrative Officer

Lower Tier(s) Affected: All Grey County

Status: Recommendation

1. That Report CAOR-TAC-24-18 regarding revised Terms of Reference for the Tourism Advisory Committee be received; and

2. That the revised Terms of Reference for the Tourism Advisory Committee as attached to Report CAOR-TAC-24-18 be endorsed.

Executive Summary

The Tourism Advisory Committee Terms of Reference required minor revisions following revised roles/title changes and membership changes.

Background and Discussion

The Tourism Advisory Committee exists to support the County of Grey’s Goal 1 in its Corporate Strategic Plan to ‘Grow the Grey County Economy’ and specifically assist in implementation of “Tourism Destination Development Action Plan.”

Committee membership includes: two members of County Council and five members to represent broader tourism interests/sectors and geography of Grey County.

The Chair and Vice Chair are elected from committee members and the Committee reports directly to Committee of the Whole with recommendations being finalized by County Council.

The recommended revisions to the terms of reference have been highlighted and attached to this report. These revisions are minor in nature, reflecting revised roles/title changes and the addition of one bullet under scope of responsibility to recognize the importance of sustainability of Grey County’s tourism industry.
Legal and Legislated Requirements
There are no legal or legislated requirements associated with this report.

Financial and Resource Implications
There are no financial or staffing considerations associated with this report.

Relevant Consultation
☒ Internal – Deputy Clerk/Legislative Coordinator, CAO, Manager of Tourism
☐ External – none

Appendices and Attachments
Grey County Tourism Advisory Committee Terms of Reference
Purpose
To strategically support the County of Grey's goal to grow its economy and specifically to implement the Tourism Destination Development Action Plan, of securing the County's place as Ontario's recreation jewel and of expanding the prosperity base.

Scope of Responsibility
- To progressively move towards Grey County Tourism’s vision: “Increase sustainable tourism revenues through managing and marketing Grey County as a tourism destination”.
- To provide guidance and recommendations on strategies, policies and priorities regarding:
  - Monitoring of emerging trends in tourism and for realignment of the County’s resources accordingly.
  - Utilization of research to build market insight, track performance and guide product development.
  - Growth of Grey County Tourism's role as a collaborative tourism leader.
  - Enhancing sustainability of Grey County as a tourism destination.

Voting Membership
- Five members of the tourism industry or public to be selected to represent a cross-section of interest in tourism sectors and geography of locations across Grey County and recommended based on a range of skills and competencies from completion of the membership application attached as Schedule "A". The term of the appointment shall be concurrent with the term of council.
- Annual appointments of two members of County Council.

Chair & Vice Chair
The Chair and Vice chair shall be elected annually from the voting members.
Meetings
The Committee shall meet quarterly.

Quorum
A quorum shall consist of more than 50% of the membership of the Committee.

Statutory Authority
The Committee is guided by the County’s Procedural By-law as well as Provincial Acts and regulations such as the Municipal Act.

Reporting Relationship
The Tourism Advisory Committee reports directly to the Committee of the Whole with recommendations being finalized by County Council.

Resources Lead Staff
County C.A.O.
Tourism Manager of Tourism
Tourism Specialists
Deputy Clerk/Legislative Coordinator Administrative Support – Assistant to the Tourism Manager and Economic Development Manager
External Agencies will be approached when required

Committee Coordination
The Clerk’s and Tourism departments will provide staff support and coordination.

Financial Support
Committee expenses and implementation of the Tourism Destination Development Action Plan are contained within the annual Tourism Department budget.
Grey County Tourism Advisory Committee Membership Application

Applicants Name: ____________________________________________________________

Address: __________________________________________________________________

E-Mail: ____________________________________________________________________

1. Please provide a short description of why you are interested in serving on this committee?
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

2. Please indicate all tourism sectors in which you have experience; (Use "C" to indicate current experience and "P" for past experience):

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Outdoor Recreation / Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Festivals &amp; Events</td>
<td>Arts &amp; Culture</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>Shopping / Retail</td>
</tr>
<tr>
<td>Attractions</td>
<td>Other (please elaborate):</td>
</tr>
</tbody>
</table>

3. Please describe your board or management experience and include current and past private or public sector boards on which you served.

____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

4. Please indicate the types of skills and competencies you would bring to the Grey County Tourism Advisory Committee as a member;

(Indicate all that apply with an "X"): 

<table>
<thead>
<tr>
<th>Management</th>
<th>Media Relations / Communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Relations</td>
<td>HR / Labour / Workforce Development</td>
</tr>
<tr>
<td>Research</td>
<td>Marketing</td>
</tr>
<tr>
<td>Education / Academic</td>
<td>Business Development</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Other (please elaborate):</td>
<td></td>
</tr>
</tbody>
</table>

Please include your resume when submitting the above form.
GREY COUNTY TOURISM
DESTINATION DEVELOPMENT ACTION PLAN

2018 Q3 Scorecard

GREY COUNTY STRATEGIC PLAN

Goal 1 - Grow the Grey County Economy
Enhance Grey County’s economy by becoming investment ready and promoting Grey County’s exceptional economic assets and opportunities

Strategic Initiatives - Implement the Grey County Tourism Destination Development Action Plan

1.11 Stakeholder Engagement
1.12 Destination Management
1.15 Market Research & Tracking
# GREY COUNTY TOURISM PRIORITY CALENDAR

1 - Accomplish in first and second quarters, Year 1 (Urgent)
2 - Accomplish in 3rd and 4th quarters, Year 1 (Immediate)
3 - Accomplish in Year 2 (Timely)
4 - Accomplish in Year 3 (Extended)

<table>
<thead>
<tr>
<th>PILLAR 1: COMMUNITY ENGAGEMENT</th>
<th>YEAR 3: 2018-2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Level</td>
<td>Q1: Jan - Mar</td>
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<tr>
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</table>

<table>
<thead>
<tr>
<th>PILLAR 2: DESTINATION MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Level</td>
</tr>
<tr>
<td>1. Create a Robust Marketing and Communications Plan</td>
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<tr>
<td>2. Embrace the Brand</td>
</tr>
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<table>
<thead>
<tr>
<th>PILLAR 3: MARKETING RESEARCH AND TRACKING</th>
</tr>
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<tbody>
<tr>
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<table>
<thead>
<tr>
<th>PILLAR 4. RESOURCE ALLOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Level</td>
</tr>
<tr>
<td>1. Reorganize Tourism Staff Functions</td>
</tr>
<tr>
<td>2. Invest in Professional Development</td>
</tr>
</tbody>
</table>
PILLAR 1 - STAKEHOLDER ENGAGEMENT

Facilitate collaboration between stakeholders, provide education and support to tourism businesses and ensure stakeholders are well informed of County activities.

**Grey County Tourism Stakeholder Database**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>Q3 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Listing Updates in the Database</td>
<td>849</td>
<td>-</td>
<td>881</td>
</tr>
<tr>
<td>Self-updates / Annual Update Calls or web search</td>
<td>26 / 849</td>
<td>-</td>
<td>2 / 881</td>
</tr>
</tbody>
</table>

**Stakeholder Engagement & Communications**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>Q3 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Newsletter - Subscriptions</td>
<td>673</td>
<td>725</td>
<td>712</td>
</tr>
<tr>
<td>Industry Newsletter - Open / Click through Rates</td>
<td>30% / 3.1%</td>
<td>30 / 3%</td>
<td>32.4% / 2%</td>
</tr>
<tr>
<td>Bounce Rates in Newsletter Tool</td>
<td>1%</td>
<td>0%</td>
<td>0.60%</td>
</tr>
</tbody>
</table>

**visitgrey.ca / Industry**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>YTD 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pageviews</td>
<td>2,249</td>
<td>2,500</td>
<td>1,821</td>
</tr>
<tr>
<td>Session Duration (mins)</td>
<td>1:53</td>
<td>2:30</td>
<td>2:10</td>
</tr>
<tr>
<td>Bounce Rate</td>
<td>49.95%</td>
<td>45%</td>
<td>50.93%</td>
</tr>
</tbody>
</table>

**Tourism Talks**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Events</td>
<td>10</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Attendees</td>
<td>469</td>
<td>250</td>
<td>230</td>
</tr>
</tbody>
</table>
PILLAR 2 - DESTINATION MANAGEMENT

Management and marketing of Grey County to increase tourism benefits and differentiate the County from its competition.

Marketing & Destination Development Plan

KPIs

<table>
<thead>
<tr>
<th>KPIs</th>
<th>TARGET - Q1 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop Annual Plan to Guide Marketing &amp; Communications</td>
<td>✅ April 11</td>
</tr>
<tr>
<td>Sharing with Stakeholders</td>
<td>✅ TAC – April 11</td>
</tr>
<tr>
<td></td>
<td>✅ DMO Working Group – April 12</td>
</tr>
<tr>
<td></td>
<td>✅ Posted to visitgrey.ca/Industry – April 30</td>
</tr>
</tbody>
</table>

Embrace The Brand

KPIs

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>YTD 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Style Guides Distributed - Version 1.0 (Content Creators)</td>
<td>30</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Brand Style Guides Distributed - Summary (partners)</td>
<td>109</td>
<td>15</td>
<td>3</td>
</tr>
</tbody>
</table>

Brand Compliant Marketing

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>YTD 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owned (website, vehicle, publications, tent, banners)</td>
<td>4</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Earned (Advertising, Print / Online)</td>
<td>27 / 20</td>
<td>100%</td>
<td>25 / 4</td>
</tr>
</tbody>
</table>
PILLAR 2 - DESTINATION MANAGEMENT

Marketing and Communications

Grow local/regional engagement and allow for up to 5% decrease in website visitors. We are targeting a much smaller geography with VFR and niche markets, as opposed to mass GTA marketing in years previous.

Social Media Metrics

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>YTD 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook Likes</td>
<td>17,792</td>
<td>18,990 (▲5%)</td>
<td>18,484</td>
</tr>
<tr>
<td>Instagram Followers</td>
<td>2,637</td>
<td>2,900 (▲5%)</td>
<td>2,954</td>
</tr>
<tr>
<td>Twitter Followers</td>
<td>3,897</td>
<td>3,897</td>
<td>4,191</td>
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</table>

Visitgrey.ca Metrics

<table>
<thead>
<tr>
<th>KPIs</th>
<th>YTD 2017</th>
<th>2018 TARGET</th>
<th>YTD 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sessions</td>
<td>225,028</td>
<td>260,000</td>
<td>245,607 (▲9.2%)</td>
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<tr>
<td>Users</td>
<td>169,086</td>
<td>195,000</td>
<td>188,557 (▲11.5%)</td>
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<tr>
<td>Average Session Duration (mins)</td>
<td>1:55</td>
<td>2:00</td>
<td>1:42 (▼11.8%)</td>
</tr>
<tr>
<td>Bounce Rate</td>
<td>56.47%</td>
<td>54%</td>
<td>59.81% (▲5.9%)</td>
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Newsletters

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>2018 TARGET</th>
<th>Q3 2018</th>
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</thead>
<tbody>
<tr>
<td>Weekly Events</td>
<td>996</td>
<td>1,050</td>
<td>1,114</td>
</tr>
<tr>
<td>Newsletter – Subscriptions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open / Click Through Rates</td>
<td>33%</td>
<td>35% / 3%</td>
<td>32.4% / 4.3%</td>
</tr>
<tr>
<td>Consumer Newsletter – Subscriptions</td>
<td>3,411</td>
<td>3,580</td>
<td>3,126</td>
</tr>
<tr>
<td>Fall Newsletter - Open / Click Through</td>
<td>37.2%</td>
<td>30% / 3.1%</td>
<td>32.4% / 6.3%</td>
</tr>
</tbody>
</table>
PILLAR 2 - DESTINATION MANAGEMENT

Social Media Monitoring

#ColourItYourWay posts:

1,754 photos using that hashtag
PILLAR 2 - DESTINATION MANAGEMENT

Media Relations

Target – To host media influencers with at least 5,000 followers and who will consistently provide at least 600 likes in order to increase engagement (likes/comments/shares).

KPIs

<table>
<thead>
<tr>
<th></th>
<th>Q3 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Facebook</td>
</tr>
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Yashy Murphy (Baby and Life)

<table>
<thead>
<tr>
<th>Ave # Followers</th>
<th>1,210</th>
<th>11.8K</th>
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<tbody>
<tr>
<td># Posts</td>
<td>6</td>
<td>8</td>
<td>35</td>
</tr>
<tr>
<td>Views / likes (per post)</td>
<td>23</td>
<td>900</td>
<td>110</td>
</tr>
<tr>
<td>Comments (per post)</td>
<td>6</td>
<td>26</td>
<td>2</td>
</tr>
<tr>
<td># InstaStories</td>
<td>-</td>
<td>45</td>
<td>-</td>
</tr>
<tr>
<td>Views (per instastory)</td>
<td>-</td>
<td>300</td>
<td>-</td>
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</table>

Natalie Preddie (The Adventures of Natty P & Co)

<table>
<thead>
<tr>
<th>Ave # Followers</th>
<th>865</th>
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<th>3,967</th>
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<tbody>
<tr>
<td># Posts</td>
<td>5</td>
<td>6</td>
<td>20</td>
</tr>
<tr>
<td>Views / likes (per post)</td>
<td>14</td>
<td>274</td>
<td>96</td>
</tr>
<tr>
<td>Comments (per post)</td>
<td>3</td>
<td>21</td>
<td>13</td>
</tr>
<tr>
<td># InstaStories</td>
<td>-</td>
<td>23</td>
<td>-</td>
</tr>
<tr>
<td>Views (per instastory)</td>
<td>-</td>
<td>133</td>
<td>-</td>
</tr>
</tbody>
</table>

Candace Sampson (Life in Pleasantville)

<table>
<thead>
<tr>
<th>Ave # Followers</th>
<th>-</th>
<th>30.5K</th>
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<tbody>
<tr>
<td># Posts</td>
<td>-</td>
<td>5</td>
<td>-</td>
</tr>
<tr>
<td>Views / likes (per post)</td>
<td>-</td>
<td>974</td>
<td>-</td>
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<tr>
<td>Comments (per post)</td>
<td>-</td>
<td>19</td>
<td>-</td>
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<tr>
<td># InstaStories</td>
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<td>-</td>
</tr>
<tr>
<td>Views (per instastory)</td>
<td>-</td>
<td>316</td>
<td>-</td>
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</table>
PILLAR 2 - DESTINATION MANAGEMENT

Media Relations

CTV Kitchener: Getaway Ideas Within The Province
August 21, 2018

A Family Summer Getaway in Grey County
July 31, 2018

4 Surprising Discoveries in Owen Sound
#MurphysDoOwenSound
Varly September 13, 2018

Earlier this summer we visited Owen Sound, a small city that’s a two and a half hour drive from downtown Toronto, to explore the outdoors. During that visit I also stumbled upon some discoveries that caught me by surprise. Many visit Owen Sound to explore the waterfalls in the area or to see the museums [...] More >

Where to Eat and Drink in Owen Sound
#MurphysDoOwenSound
Chris Murphy July 15, 2018

Our family recently spent a weekend exploring Ontario’s Grey County. The area features some of the premier tourist destinations within 200 km of Toronto. Containing a number of communities along the south shores of Georgian Bay, Grey County is a great place to escape the big city for a weekend. With a number of water [...] More >

Escaping the City to Explore Owen Sound
#ColourYourWay
#MurphysDoOwenSound
Varly July 9, 2018

One of our missions this summer is to explore more of Ontario and so, the weekend before school let out for the summer, we gave the kids a taste of what’s to come this summer. We have quite a few road trips with our kids planned over the next couple of weeks and most of [...] More >

Coffin Ridge Winery with Kids #ColourYourWay
Varly July 3, 2018

The first hint of summer in Ontario will have you searching for the best cottage in Ontario and if you’re looking for a getaway that’s an easy drive from Toronto, with winery views and one that can accommodate a large group, Coffin Ridge Winery’s housing should be on your radar. It may not be right [...] More >
PILLAR 3 - MARKET RESEARCH & TRACKING

Track key quantitative and qualitative metrics and economic impact of tourism and measure success of the DDAP

**DDAP Tracking**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>Q1 2018</th>
<th>Q2 2018</th>
<th>Q3 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017 Year End Report Card to TAC / County Council</td>
<td>✔</td>
<td>✔</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Quarterly Scorecard brought to TAC</td>
<td>-</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

**Quantitative and Qualitative Metrics and Economic Impact of Tourism**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>Q1 2018</th>
<th>Q2 2018</th>
<th>Q3 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard on the state of tourism produced based on Industry Surveys</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Annual Event &amp; Attraction Tracking (2017)</td>
<td>-</td>
<td>✔</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Updated Tourism Metrics Summary</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>✔</td>
</tr>
</tbody>
</table>

**Create Profiles of Target Market Audience Groups**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>2017</th>
<th>Q1 2018</th>
<th>Q2 2018</th>
<th>Q3 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postal codes provided by Blue Mountain Cluster partners</td>
<td>-</td>
<td>✔</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Profiles run for Blue Mountain Cluster partners</td>
<td>-</td>
<td>-</td>
<td>✔</td>
<td>-</td>
</tr>
</tbody>
</table>
PILLAR 4 - RESOURCE ALLOCATION

To create the most effective tourism team at Grey County.

Industry/Professional Development Sessions Attended (Presented)

- Food Bloggers of Canada Conference  
  September - Alison Theodore

- TIAO Tourism Summit - Windsor  
  October - (Bryan Plumstead), Heather Aljoe, Alison Theodore

- Apple Pie Trail Strategic Plan Workshop  
  October - Alison Theodore

- Road Scholar Workshop  
  October - Alison Theodore

- Presentation to Transporation Services Winter Roads Crews  
  October - (Heather Aljoe)
Grey County Tourism
Market Ready Criteria – Draft for discussion

This new approach will assist our tourism partners and businesses to seize the global opportunity that tourism offers and at the same time increase consumer confidence and meet expectations when potential visitors are considering Grey County as their Destination of choice.

Am I in the Tourism business?

Tourism refers to “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes”. (UNWTO definition). A visitor is any person visiting a region or country other than his usual place of residence and in which he spends less than a year, for any reason other than paid work. A tourist is a visitor who is motivated to travel for recreation, pleasure, health, study, sports, business, family and so forth and spends at least a night in the country visited. In Canada for a domestic trip to be part of tourism it has to be an “out-of-town” trip and, in addition, for same day trips it has to be 40 kms one way from the traveller’s home. This implies that not all visitors are tourists.

Grey County Tourism’s goal is to increase sustainable tourism revenues through managing and marketing Grey County as a tourism destination.

If your businesses, activity or event provides services for the tourist market then you might consider a listing on visitgrey.ca.

Marketing is key to attracting tourists to Grey County and these criteria will assist our tourism partners & businesses to better understand what marketing opportunities are available for them. This new approach will give businesses the advantage to position themselves to benefit from a growing tourism market and actively participate in the success of the tourism industry in Grey County.

Today’s travelers expect certain minimum standards when doing business with tourism operators, accommodations and event organizers. In order for our tourism industry to remain competitive, we’ve implemented minimum criteria necessary for those businesses accessing Grey County’s marketing & partnership programs.

We have developed the following criteria for our industry partners to self-evaluate for participation in our Grey County marketing programs. The criteria has been developed referencing other destination and provincial “Best-in-Class” practices.

The goal of this program is two-fold.
- First, it is to provide Grey County’s tourism industry with “best practice” criteria to maintain a competitive approach in today’s global marketplace.
Second, it is to increase consumer confidence when potential visitors are considering Grey County as their destination of choice. Increased consumer confidence results in satisfactory visitor experiences and will encourage repeat visitation for longer stays.

**VISITOR READY**

Visitor Ready refers to a business that has all their licenses, permits and insurance in place in order to operate legally. These criteria will determine if a tourism supplier is able to offer business-ready products to consumers.

1. Does my business cater to visitors?
2. Do you maintain a good standing of all applicable business licenses, insurance and legislative requirements?
3. Do you have sufficient washroom facilities for casual visitors.
4. Do you maintain a staffed business location with a set schedule of operating hours?
5. Do you comply with local/regional health, safety and sanitation standards?
6. Do you provide a contact telephone number and email contact year-round?
7. Do you have a web or social media page where visitors can obtain and request information?
8. If closed for season, do you provide automated response through voicemail and or email?
9. Do you accept credit & debit cards? If not, do you clearly post that you accept cash only or that there is a debit machine nearby?
10. Do you have branded on-site signage?

**Results**

This is the basic level required to conduct business. Meeting this criteria means the operator/facility:

- Qualifies as a business listing on our visitgrey.ca tourism website

**MARKET READY**

Market Ready refers to a business that markets to potential visitors in the planning stages, communicates with potential visitors year-round, and is ready to accept advanced reservations. These criteria will determine if a tourism supplier is ready to offer market-ready products to consumers. The business must meet “Visitor Ready” criteria plus:

1. Does your business already market to potential visitors?
2. Do you communicate with potential visitors year-round?
3. Are you ready to accept advanced reservations?
4. Do you provide a published pricing policy?
5. If so, can you set and confirm prices six months in advance?
6. Do you have a published consumer billing, payment, and cancellation policy?
7. Do you have marketing materials such as brochure, rack card, website or social media accounts?
8. Do you have parking in close proximity to your site?
9. Do you provide way-finding for your visitors through printed maps, online, GPS or signs?
10. During operating season, do you maintain a 24-48 hour response time or less, to
inquiries and a 24-hour response time to reservation/booking requests?
11. Are you prepared to communicate and accept reservations by telephone, fax or e-mail and provide same day confirmation of booking arrangements?
12. Do you have high-resolution images and/or video footage for promotional purposes?
13. Do you have frontline staff that is trained in customer service?
14. Optional: Does your location offer bilingual services (list in drop down languages)?
15. Optional: Does your business provide value added services? (Luggage drop for hikers/cyclists, member of Ontario By Bike)

Results
This is the basic level of readiness to conduct tourism operations. Meeting this standard means the operator/facility:
- Qualifies for an enhanced website listing for their business on visitgrey.ca, the
  official destination website for Grey County (i.e. full profile, reciprocal links to your
  website)
- Is eligible to participate in Grey County promotions for local and regional markets
  (eg. Grey County Fam/Media Tours, GCT produced content, website travel path, etc.)
- Is eligible for inclusion in itineraries/packages
- Gains first opportunity to take part in media activities
- Gains priority registration at regional and national consumer shows and travel trade
  marketplaces

EXPERIENCE READY – RTO7 Program

RTO7 provides an Experience Implementation Program to assist stakeholders to develop
products and experiences that differentiate our region from other places in Ontario, and
benefit the business. Experiences can help increase length of stay, increase yield per
visitor and encourage visitors to return more frequently. Part of the Program includes the
following list of criteria:

1. Businesses or organizations must be established and be able to demonstrate the
   capacity (financial and otherwise) to execute the project.
2. Able to execute and meet agreed upon timelines.
3. Organizations must be legally registered to operate in Ontario.
4. Tourism businesses/organizations outside BruceGreySimcoe (e.g. a provincial
   association) can apply as long as there is strong involvement from a relevant
   BruceGreySimcoe stakeholder and part of the experience or product must be
   within the geographical boundaries of BruceGreySimcoe.
5. Carry liability insurance and add RTO7 as an additional insured party.
6. All required operating permits (federal, provincial, municipal, etc.)
7. Have a website/social media page(s), phone number and email address that are
   regularly monitored.
8. Identify BruceGreySimcoe and Ontario as partners on website with active links
    back to BruceGreySimcoe.com and ontariotravel.net respectively.
9. Identify BruceGreySimcoe as a partner in all press releases related to the product
10. Social media posts related to the product or experience tag @BruceGreySimcoe and use #brucegreysimcoe on Facebook, Twitter and Instagram.
11. Identify BruceGreySimcoe and the Province of Ontario as partners on all printed collateral supported through the program by including each logo.
12. Complete the free BruceGreySimcoe Service Excellence online training program prior to submitting an application.
14. Maintain a current operator listing on Ontariotravel.net.
15. Join the RTO7 E-Newsletter http://rto7.ca/Public/Special-Pages/Mailing-List-Signup. These criteria will be used to determine if a tourism supplier is ready to offer experiential product to consumers.

Export-Ready Criteria

The Canadian Signature Experiences (CSE) program promotes unique and compelling Canadian experiences to the international travel trade, and through the trade, to consumers. Working with the travel trade requires some additional practices on the part of businesses, due to the greater degree of pricing reliability, operational integrity, and marketing lead time required. As the CSE program has been developed to promote sales of tourism experiences through the travel trade, these practices must be adhered to by any business applying to have a tourism experience included in the CSE program.

This program works in conjunction with Ontario’s Signature Experiences program. There are currently 34 Signature Experiences in Ontario, with 2 in Grey County (Scenic Caves Nature Adventures – Out of the Ice Age, and Blue Mountain Resorts Ltd/Blue Mountain Village Association – Apple Pie Trail Peddle & Paddle Adventure.)
Creating Attainable Housing for the Tourism Workforce in South Georgian Bay
NBLC

- **40+ Years**
- **Planning / Economics / Finance / Housing**
- **Public Policy**
  - Grey County Housing Study
  - Town of Blue Mountains Housing Study
- **Private Development**
  - Lora Bay
  - Cobble Beach

NBLC’s Experience

Public Policy Analysis

Institutional Asset Mgmt & Planning

Private Real Estate Development
Why Are We Here / Cost of Inaction

- Tourism sector = 1,400 businesses, 14,000 jobs
- Tourism labour shortage = 800+ workers
- Lack of *attainable housing* is key contributor to the labour shortage
- Left to market, issue will worsen
  - Economic Impacts
  - Social / Community Impacts
Defining Attainable Housing

• Affordable for the household
  – 30%> gross household income for housing

• A diverse mix of housing choices
  – Pricing, sizing, built form, tenure, etc
  – Allows for household movement as needs change
What’s Holding Back Attainability?

- Market demand pushing pricing upwards
  - Increasing faster than incomes
- Seasonal tenants/jobs
- Limited entry-level housing
- Transportation issues
- Lack of incentives for development
### Housing Attainability Levels by Income

<table>
<thead>
<tr>
<th>FT/PT*</th>
<th>Hourly Wage</th>
<th>Annual Household Income</th>
<th>Monthly Household Income</th>
<th>Maximum Ownership Price^</th>
<th>Maximum Monthly Rental Price</th>
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</thead>
<tbody>
<tr>
<td>PT</td>
<td>$14</td>
<td>$14,560</td>
<td>$1,213</td>
<td>$29,000</td>
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<td>$4,167</td>
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<td>$100,000</td>
<td>$8,333</td>
<td>$417,000</td>
<td>$2,500</td>
</tr>
</tbody>
</table>

*Full-Time (40 hours per week) / Part-Time (20 hours per week)

^Assumes 20% down payment, 5% fixed interest rate, 25-year mortgage, $200 monthly utility costs, 1% annual property tax rate.

Based on 30% of gross income used for housing costs
Targets and Priorities

• **Entry-level, dorm-style housing**
  – Minimum wage, seasonal, part-time
  – Young, single, without children

• **Purpose-built rental housing**
  – Household incomes: $40,000 to $75,000
  – Elevated from entry-level
  – Renters on arrival to community

• **Affordable Home Ownership**
  – Households under $100,000
  – Could include a mix of housing types
Recommendation: Land Use Policy

• First step to encourage development
• Build on existing County and Local policy and programs
  – Community Improvement Plans
  – Housing first priority for surplus land / S. 37
  – Secondary suites
  – Co-ordinate County and Local incentive programs
  – Explore Inclusionary Zoning – but with care
  – Ensure land/incentives provide housing for priority groups
• Enhanced second mortgage program?
  – Linked to projects of affordable priced units
## Recommendation: PPP

<table>
<thead>
<tr>
<th>Public</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Land</td>
<td>• Land</td>
</tr>
<tr>
<td>• Encourage Employer Underwriting</td>
<td>• Development Expertise</td>
</tr>
<tr>
<td>• Development Charge Waivers/Deferrals</td>
<td>• Financing</td>
</tr>
<tr>
<td>• Property Tax Deferral</td>
<td>• Project / Construction Management</td>
</tr>
<tr>
<td>• Fee Waivers</td>
<td>• Construction Management</td>
</tr>
<tr>
<td>• Expedited Approvals</td>
<td>• Affordability commitment</td>
</tr>
<tr>
<td>• Parkland Waiver</td>
<td>• Design</td>
</tr>
<tr>
<td>• Reduced Standards</td>
<td>• Sustainability</td>
</tr>
<tr>
<td>• Second Mortgage Program</td>
<td>• Operation</td>
</tr>
</tbody>
</table>
Recommendation: PPP

- Request for Proposals for PPP
  - Target entry level workforce
  - Apartment style dormitory housing
- Employers
  - Underwrite % of rental guarantee
- Public Sector
  - Offer incentives, if needed
- Developer
  - Build and operate to public sector / employers specs (affordability, design, public realm, etc)
Recommendation: Second Mortgage Project

- Enhanced second mortgage program
- Bundle incentives and apply as second mortgage to purchasers
- Developer gets benefit of waiver = more affordable units
- Purchaser pays back fees/charges from equity appreciation
- Could be partnered with specific developments
  - Improves program exposure & benefits developer marketing/sales
Recommendation: Second Mortgage Project

• Request for Proposals
  – Target couples & singles
  – Ownership units

• Public Sector:
  – Offer incentives via second mortgage to purchasers

• Developer:
  – Build and operate to public sector / employers specs (affordability, design, public realm, etc)
Recommendation: Tiny Home Project

• Public Sector:
  – Approvals / Negotiate code/servicing requirement

• Developer:
  – Ensure design consistency

• Operator
  – Public or private
  – Establish rates and lease terms
  – Long-term management

• Lower density than apartments, but more appropriate for height sensitive location
Recommendation: Principles

- Communicate “Return of Investment / Cost of Action”
- Cater strategies to each community
- Create a “Menu” of incentive programs
  - Performance-based
  - Incentivize workforce instead of developers, where possible
- Predictability
- Budget Certainty
- Market Outreach
Recommendation: Partners

• Employer Partners – underwrite housing investment
  – Show leadership – create support

• Public Sector Partners – shape programs based on local needs
  – Leverage existing programs
  – Determine local needs / target workforce groups
  – Analyze incentive options – can land be offered?
  – Community Improvement Plans
  – *Already happening in Grey County*

• Outreach/Engage the Development Community (both partners)
  – Market soundings
Questions?
PILLAR 3: MARKET RESEARCH & TRACKING

Update – November 2018

Recommendation 2.
Track key quantitative and qualitative metrics and economic impact of tourism.

Key Objective
Provide data of strategic importance to stakeholders.

Context & Reasoning
Currently, there is a lack of Grey County specific tourism data, which makes it difficult to understand what the impact of the industry is on the County’s economy and overall development. Creating, updating and sharing a dashboard of data on the performance of the tourism industry should help private businesses plan for the future, and build stronger businesses. Furthermore, relevant data on the economic impact of tourism to the County should help make a better case to residents and other government bodies about the importance of the industry and justify prioritisation in funding and investment. Understanding the value of tourism critically informs marketing and product development, both for the public and private sector. Suggestions for measures to collect include: Length of stay, customers/year, Origin of customers, Full time/Part time employees, Percentage of revenue spent on payroll, Guest expenditure/day, Percentage of bookings done online, Top 3 places of origin.
More Specifically:

**WHAT DO WE WANT TO KNOW?**

**SUPPLY**
- Economic impact of tourism
  - Number of tourism jobs
  - Number of tourism businesses
  - Tax revenue
  - Business trends (e.g. YTY)
  - HST or other indicator

**DEMAND**
- Everything in Regional Tourism Profiles for...
  - Visitors to gated and ungated attractions & events
  - Visitors/VFR/residents/second home owners
  - New Canadians
- Visitor Satisfaction
- Trip Motivators
- Visitor Expenditures
- Forecasts
- How was the “season”?

**RTO7**
Grey County

**DMOs**
Destination Marketing Organizations

Municipalities

Public Attractions
Including Parks

Private Tourism Businesses

**More Specifically:**

- **SUPPLY**
  - Understand Visitor Trends
  - Reliable, consistent input to Marketing/Business Plans
  - Support for Existing/New Product & Experience Development
  - Estimate Economic Value of Tourism

- **DEMAND**
  - Timely & Reliable
WHAT WE KNOW ABOUT SUPPLY?

SUPPLY

- Economic impact of tourism
- Number of tourism jobs
- Number of tourism businesses
- Tax Revenue
- Business trends (e.g. YTY)
- HST or other indicator

Our Information Sources

- Grey County Tourism Operator Data Base
- OMAFRA Analyst

TOURISM BUSINESSES (584)  NATURAL AREAS (143) ORGS (13)
Grey County database

<table>
<thead>
<tr>
<th>Category</th>
<th># Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bed &amp; Breakfasts</td>
<td>138</td>
</tr>
<tr>
<td>Campgrounds</td>
<td>3267</td>
</tr>
<tr>
<td>Hotel, Motel, Inn</td>
<td>1486</td>
</tr>
<tr>
<td>Vacation Rentals</td>
<td>170</td>
</tr>
<tr>
<td>Total</td>
<td>5061</td>
</tr>
</tbody>
</table>
TOURISM JOBS* compared to TOTAL JOBS - 2017
OMAFRA Analyst

Trends
• 22% growth in tourism jobs vs. 3% growth for all jobs (2012-2017)

• Youth, women and immigrants are more highly represented in tourism jobs in Ontario
WHAT WE KNOW ABOUT DEMAND?

**DEMAND**
- Everything in Regional Tourism Profiles for...
  - Visitors to gated and ungated attractions & events
  - Visitors/VFR/residents/second home owners
  - New Canadians
- Visitor Satisfaction
- Trip Motivators
- Visitor Expenditures
- Forecasts
- How was the “season”?

**2013/17 Attendance Trends**
20 Grey County Events & Attractions

- Over 580,000 attendees (don’t know proportion visitors)
- 12 increased and 8 decreased (*Holstein Rodeo did not run in 2016)

<table>
<thead>
<tr>
<th>No.</th>
<th>Number of Events &amp; Attractions</th>
<th>Overall Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Change 2013-17</td>
<td>Decrease</td>
</tr>
<tr>
<td>Gated Events (counted)</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Non-Gated Events (estimated)</td>
<td></td>
<td>(8)7</td>
</tr>
<tr>
<td>Attractions (counted)</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>20</td>
</tr>
</tbody>
</table>

**4 Gated Events**
- Centurion Cycling
- Summerfolk
- Concours D’Elegance
- Christmas in the Country

**8 Non-Gated Events**
- Apple Harvest Craft Show
- Elvis at Blue Doors Open
- Holstein Maplefest
- Festival of Northern Lights
- Salsa at Blue Salmon Spectacular

**9 Gated Attractions**
- Ecoadventure
- Le Scandinave
- Scenic Caves Nordic
- Inglis Falls - Grey Sauble CA
- Grey Roots Museum Plunge
- Tom Thomson Gallery
- Craigleith PP - Day Use
- Scenic Caves Nature Adventures

Our Information Sources
- Grey County Tourism Annual Attractions/Events Survey
- Grey County Tourism Google Analytics - Inquiries
- OMTCS Regional Tourism Profiles (RTP)
- OMTCS Market Segmentation for Bruce Grey Simcoe
- PRIZM Market Segmentation (New Tool)
- Partner surveys/info centre stats
2012/16 Attendance Trends
9 Grey County Attractions

Grey County Gated Attractions 2010-17

- Blue Mountain Area (6 attractions)
- Owen Sound Area (3 attractions)

3 Gated Attractions
- Grey Roots Museum & Archives
- Tom Thomson Art Gallery
- Inglis Falls - Grey Sauble CA

6 Gated Attractions
- Scenic Caves Nature Adventures
- Plunge Ecoadventure
- Le Scandinave
- Crimeleith PP - Day Use

2010/17 Attendance Trends
11 Grey County Events

Grey County Events 2010-17

4 Gated Events
- Centurion Cycling
- Summerfolk
- Concours D’Elegance (started in 2013)
- Christmas in the Country

8 Non-Gated Events
- Apple Harvest Craft Show
- Elvis at Blue Salsa at blue
- Holstein Maplefest
- Doors Open
- Festival of Northern Lights
- Salmon Spectacular

*Holstein Rodeo (2015 last)
What they’re looking for:

1. / (14,159 views)
2. /play/outdoor-sights/waterfalls (12,455 views)
3. /public-events/day (11,530 views)
4. /business/eugenia-falls (7,660 views)
5. /travel-tools/travel-stories/blue-mountain-fall-driving-route (6,977 views)
6. /request-your-grey-county-map (6,906 views)
7. /travel-tools/guides-brochures (6,589 views)
8. /unique-grey/communities/thornbury (6,383 views)
10. /business/hoggs-falls (5,565 views)
11. /unique-grey/communities/waters-falls (5,421 views)
13. /eat/winery-brewhouses-cideries (4,843 views)
14. /play/outdoor-activities/paddling (4,454 views)
15. /play/outdoor-activities/sledding (4,266 views)
16. /play/outdoor-sights/scene-lodges (4,244 views)
17. /play/outdoor-activities/hunting (3,944 views)
18. /stay/campsites-rv-sites (3,911 views)

Where they’re looking from:

1. Toronto (196,916 visits, 51,204 new visitors)
2. Collingwood (10,690 visits, 4,216 new visitors)
3. Kitchener (7,950 visits, 3,344 new visitors)
4. Hamilton (7,726 visits, 3,284 new visitors)
5. Sauganash (7,119 visits, 3,123 new visitors)
6. Guelph (6,106 visits, 2,399 new visitors)
7. Barrie (6,045 visits, 2,354 new visitors)
8. Owen Sound (6,014 visits, 2,336 new visitors)
9. Mississauga (5,604 visits, 2,264 new visitors)
10. (not set) (4,540 visits, 1,908 new visitors)
11. Waterloo (4,112 visits, 1,879 new visitors)
12. Hanover (4,061 visits, 1,867 new visitors)
13. London (4,017 visits, 1,792 new visitors)
14. South Bruce Peninsula (3,888 visits, 1,665 new visitors)
15. Ottawa (3,685 visits, 1,579 new visitors)
16. Brantford (3,618 visits, 1,532 new visitors)
17. Guelph (3,031 visits, 1,445 new visitors)
18. Oakville (2,643 visits, 1,304 new visitors)
19. Vaughan (2,555 visits, 1,211 new visitors)
20. Montreal (2,547 visits, 1,211 new visitors)
21. Markham (2,079 visits, 999 new visitors)
22. The Blue Mountains (1,900 visits, 999 new visitors)
23. Orangeville (1,682 visits, 999 new visitors)
OMTCS 2015 RTP for Bruce Grey Simcoe*

Total visitors 12,401,200
(not including US)

WHERE THEY COME FROM
Ont 97%
Cdn 1%
US 1%
Overseas 1%

TOTAL ACTIVITIES BY DAY VISITORS
VFR
Shopping
Beach
Sightseeing
Fishing
Skiing
Business Meeting
Casino
Hiking
Spectator Sport

Total Spend $1.348 Billion
(not including US)

$73 per person per same-day visit

$168 per person per overnight stay

WHERE THEY STAY
Private Homes 40%
Private Cottages 26%
Hotels/Motels/Resorts 18%
Camping/RV Facilities 14%
Other 3%

WHEN THEY COME
Q1: Visits 19%, Spend 21%
Q2: Visits 28%, Spend 24%
Q3: Visits 32%, Spend 38%
Q4: Visits 21%, Spend 17%

WHY THEY COME
Pleasure 63%
VFR 37%
Shopping 26%
Business 18%
Other Personal 3%

Visit a Park
Cultural Performance
Boating
Fishing
Camping
Skiing/Boarding
Hiking
Beach
Shopping
VFR

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(not including US)

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Other Personal 3%

Visit a Park
Cultural Performance
Boating
Fishing
Camping
Skiing/Boarding
Hiking
Beach
Shopping
VFR

Source: MTCS, Regional Tourism Profiles (RTP) 2015
OMTCS 2015 RTP for Grey County

**Total visitors 2,399,159**  
(not including US & Overseas)

WHEN THEY COME (visits)

- Q1: 18%
- Q2: 21%
- Q3: 35%
- Q4: 26%

WHY THEY COME

- Pleasure: 50%
- VFR: 38%
- Shopping: 5%
- Business: 4%
- Other Personal: 2%

**TOP VISITORS ORIGINS**

- Metro Toronto (16%)
- Bruce County (13%)
- Waterloo Regional Municip. (12%)
- Peel RM (11%)
- Grey County (9%)
- Halton RM (8%)
- York RM (65)
- Wellington County (5%)
- Simcoe County (4%)
- Peterborough County (2%)

Total Spend $257,813,182  
(not including US & Overseas)

- $92 per person per same-day visit
- $139 per person per overnight stay

HOW THEY VISIT

- Same-day: 67%
- Over-night: 33%

WHERE THEY STAY

- Private Homes: 42%
- Private Cottages: 25%
- Hotels/Motels/Reso...: 23%
- Camping/RV Facilities: 10%
- Other: 0%

**TOP 10 ACTIVITIES**

- VFR
- Beach
- Shopping
- Hiking
- Sports Events
- Camping
- Playing a Sport
- Sightseeing
- Skiing
- Boating

ITEMIZED VISITOR SPENDING

- Transport
- Accommodation
- Food & Beverage (Total)
- Recreation/Entertainment (Total)
- Retail/Other (Total)

*Source: MTCS, Regional Tourism Profiles (RTP) 2015*
GREY COUNTY ANALYTICS

How PRIZM works...

Demographics
- Age – 25 to 34
- 1 person households
- Non-family household
- Use public transit
- University degree
- Management occupation
- Single (never married)
- English mother tongue
- Apartment

Retail Behaviour
- Sporting Life
- Mastermind
- Grand and Toy
- Loblaws
- Holt Renfrew
- Talbots
- Sunglass Hut
- Black’s
- Town Shoes
- Pharma Plus
- Lenscrafters
- SoftMoc
- Nine West
- Apple
- Pier 1 Imports

Sports and Leisure
- Opera
- Museums
- Art Galleries
- Live Theatre
- Foreign Movies
- Nightclubs/bars
- Pop Music Concerts
- Attend Pro Basketball
- Attend Pro Baseball
- Health/Fitness Club
- Downhill Skiing
- Canoeing
- Yoga/Pilates
- Tennis
- Ice Skating

Media Preferences
- Medium-Light Radio Listener
- Rock
- News/Talk/Information/Sports
- Oldies
- Light TV Viewer
- Sitcoms
- News/Current Affairs
- Heavy Reader of Daily Newspaper
- Finance/Business
- Real Estate/Homes
- Medium-Light Magazine
- News and Current Affairs
- Heavy Internet Use
- Buy Books Online
BLUE CLUSTER Pilot Project

Background

This is a pilot project by Grey County Tourism to build better data & understanding for product development & marketing at the sub-county – DMO – Cluster level using aggregated postal code data from participating partners.

Goals:

• Understand current visitation patterns at the DMO or Cluster geography
• Identify common market segments/profiles
• Identify Best prospect areas/segments in Ontario for sustainable growth

Participating partners:

• Scandinavian Spa
• Scenic Caves
• BMVA
• BMR
• Grey County Tourism Social Media inquiries

Assumptions

• No personal information was gathered in this project, postal codes only
• Each partner receives a template report for their data set
• Partner data/results are not shared between other partners (unless mutually agreed upon)
• Aggregated or summary analysis is presented to understand market segments/trends at the cluster level

Process

1. Data Discovery: Where are existing visitors coming from? What data do we have to work with?
2. Profile: Who are our existing visitors? Who are potential visitors?
3. Segment: What are our market segments? Which segments should we be targeting?
4. Identify & Locate: Which cities should we deploy in? Which cities are ripe for future investment?
5. Personify: Next steps?
% Pen and Index are relative measures of the # of visitors (or inquiries or homeowners) for each data set (eg. from Toronto) compared to the total visitors for the data set and then compared to the total population (eg. Toronto). For the sample from Data Set A below, Simcoe Cty has the highest penetration rate at 0.12 and Index at 293.

Total Count is the actual # of inquiries /visitors for all partners. Eg. 6,927 from Toronto. Ave % (eg. 19.1% for Toronto) represents the average for all partner data sets. (Actual counts and %s are not shown for each partner dataset.)

The Gravity Model: visitors to a destination are directly proportional to the size of the source market and inversely proportional to distance. So we see neighboring CDs index very highly. Where are the surprises that are farther away & index highly?

<table>
<thead>
<tr>
<th>Top CDs</th>
<th>Data Set A</th>
<th>Data Set B</th>
<th>Data Set C</th>
<th>Data Set D</th>
<th>Data Set E</th>
<th>Data Set F</th>
<th>BLUE CLUSTER Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Pen</td>
<td>Index</td>
<td>% Pen</td>
<td>Index</td>
<td>% Pen</td>
<td>Index</td>
<td>% Pen</td>
</tr>
<tr>
<td>Toronto</td>
<td>0.02</td>
<td>53</td>
<td>0.01</td>
<td>86</td>
<td>0.02</td>
<td>70</td>
<td>0.06</td>
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<tr>
<td>York</td>
<td>0.03</td>
<td>68</td>
<td>0.01</td>
<td>97</td>
<td>0.03</td>
<td>101</td>
<td>0.04</td>
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<tr>
<td>Peel</td>
<td>0.03</td>
<td>79</td>
<td>0.01</td>
<td>98</td>
<td>0.02</td>
<td>72</td>
<td>0.02</td>
</tr>
<tr>
<td>Simcoe C</td>
<td>0.12</td>
<td>293</td>
<td>0.02</td>
<td>304</td>
<td>0.14</td>
<td>434</td>
<td>0.07</td>
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<tr>
<td>Halton</td>
<td>0.04</td>
<td>106</td>
<td>0.01</td>
<td>91</td>
<td>0.04</td>
<td>139</td>
<td>0.05</td>
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<tr>
<td>Waterloo</td>
<td>0.06</td>
<td>145</td>
<td>0.01</td>
<td>135</td>
<td>0.04</td>
<td>134</td>
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<td>Durham</td>
<td>0.03</td>
<td>60</td>
<td>0.01</td>
<td>68</td>
<td>0.02</td>
<td>71</td>
<td>0.01</td>
</tr>
<tr>
<td>Hamilton</td>
<td>0.04</td>
<td>92</td>
<td>0.00</td>
<td>58</td>
<td>0.02</td>
<td>79</td>
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<tr>
<td>Middlesex</td>
<td>0.06</td>
<td>151</td>
<td>0.00</td>
<td>60</td>
<td>0.02</td>
<td>59</td>
<td>0.01</td>
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<td>Wellington</td>
<td>0.10</td>
<td>232</td>
<td>0.01</td>
<td>102</td>
<td>0.07</td>
<td>212</td>
<td>0.05</td>
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<td>Niagara</td>
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<td>44</td>
<td>0.01</td>
<td>75</td>
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<td>49</td>
<td>0.01</td>
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<td>0.23</td>
<td>543</td>
<td>0.02</td>
<td>294</td>
<td>0.11</td>
<td>345</td>
<td>0.02</td>
</tr>
<tr>
<td>Grey</td>
<td>0.05</td>
<td>111</td>
<td>0.00</td>
<td>24</td>
<td>0.13</td>
<td>427</td>
<td>0.02</td>
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<tr>
<td>Dufferin</td>
<td>0.19</td>
<td>451</td>
<td>0.03</td>
<td>334</td>
<td>0.09</td>
<td>290</td>
<td>0.03</td>
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<tr>
<td>Brant</td>
<td>0.08</td>
<td>192</td>
<td>0.00</td>
<td>65</td>
<td>0.02</td>
<td>59</td>
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<tr>
<td>Haliburton</td>
<td>0.21</td>
<td>491</td>
<td>0.04</td>
<td>591</td>
<td>0.02</td>
<td>71</td>
<td>0.04</td>
</tr>
<tr>
<td>Perth</td>
<td>0.16</td>
<td>382</td>
<td>0.02</td>
<td>222</td>
<td>0.05</td>
<td>165</td>
<td>0.02</td>
</tr>
<tr>
<td>Oxford</td>
<td>0.12</td>
<td>284</td>
<td>0.01</td>
<td>95</td>
<td>0.02</td>
<td>72</td>
<td>0.01</td>
</tr>
<tr>
<td>Essex</td>
<td>0.00</td>
<td>8</td>
<td>0.00</td>
<td>50</td>
<td>0.00</td>
<td>15</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Who are our Visitors?

Individual reports were run and sent out to all partners.

All 6 partner data sets were summed for all 68 PRIZM segments. Four segments were consistently in the top indexing segments for all data sets and are recommended as priority segments: Kids & Careers, Satellite Burbs, Pets & PCs and Fresh Air Families.

The next group of segments were often high performers for 2 or even 3 of the data sets and also could be considered key segments. There were some interesting similarities and differences between the partner data sets.

<table>
<thead>
<tr>
<th>SG</th>
<th>SESI</th>
<th>Name</th>
<th>Ave Count for all Partners</th>
<th>Ave % for all Partners</th>
<th>Cum %</th>
<th>Average Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>S1</td>
<td>06</td>
<td>Kids &amp; Careers</td>
<td>2,483</td>
<td>7.28</td>
<td>7.28</td>
<td>148</td>
</tr>
<tr>
<td>E1</td>
<td>09</td>
<td>Satellite Burbs</td>
<td>2,127</td>
<td>6.99</td>
<td>14.27</td>
<td>142</td>
</tr>
<tr>
<td>S2</td>
<td>16</td>
<td>Pets &amp; PCs</td>
<td>2,354</td>
<td>5.38</td>
<td>19.64</td>
<td>125</td>
</tr>
<tr>
<td>E2</td>
<td>24</td>
<td>Fresh Air Families</td>
<td>1,580</td>
<td>5.03</td>
<td>24.67</td>
<td>131</td>
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<tr>
<td>U1</td>
<td>01</td>
<td>Cosmopolitan Elite</td>
<td>1,092</td>
<td>5.03</td>
<td>29.70</td>
<td>450</td>
</tr>
<tr>
<td>U1</td>
<td>03</td>
<td>Arts &amp; Affluence</td>
<td>1,026</td>
<td>3.94</td>
<td>33.65</td>
<td>226</td>
</tr>
<tr>
<td>S3</td>
<td>15</td>
<td>Heritage Hubs</td>
<td>1,784</td>
<td>3.51</td>
<td>37.16</td>
<td>115</td>
</tr>
<tr>
<td>S3</td>
<td>20</td>
<td>South Asian Achievers</td>
<td>1,000</td>
<td>3.34</td>
<td>40.50</td>
<td>104</td>
</tr>
<tr>
<td>U3</td>
<td>11</td>
<td>Urban Digerati</td>
<td>902</td>
<td>3.22</td>
<td>43.72</td>
<td>97</td>
</tr>
<tr>
<td>U1</td>
<td>02</td>
<td>Urbane Villagers</td>
<td>814</td>
<td>3.18</td>
<td>46.90</td>
<td>287</td>
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<tr>
<td>U4</td>
<td>31</td>
<td>New World Symphony</td>
<td>804</td>
<td>3.03</td>
<td>49.94</td>
<td>88</td>
</tr>
<tr>
<td>U2</td>
<td>27</td>
<td>Diverse City</td>
<td>974</td>
<td>2.89</td>
<td>52.83</td>
<td>95</td>
</tr>
<tr>
<td>U2</td>
<td>05</td>
<td>Asian Sophisticates</td>
<td>1,045</td>
<td>2.42</td>
<td>55.24</td>
<td>172</td>
</tr>
<tr>
<td>S1</td>
<td>04</td>
<td>Suburban Success</td>
<td>600</td>
<td>2.32</td>
<td>57.56</td>
<td>150</td>
</tr>
<tr>
<td>U4</td>
<td>23</td>
<td>Asian New Wave</td>
<td>474</td>
<td>2.26</td>
<td>59.82</td>
<td>102</td>
</tr>
<tr>
<td>U2</td>
<td>28</td>
<td>Metro Multiculturals</td>
<td>926</td>
<td>2.25</td>
<td>62.07</td>
<td>114</td>
</tr>
<tr>
<td>S4</td>
<td>22</td>
<td>Aging in Suburbia</td>
<td>439</td>
<td>2.25</td>
<td>64.32</td>
<td>79</td>
</tr>
<tr>
<td>U6</td>
<td>63</td>
<td>Lunch at Tim's</td>
<td>631</td>
<td>2.17</td>
<td>66.49</td>
<td>53</td>
</tr>
<tr>
<td>U1</td>
<td>08</td>
<td>Boomerang City</td>
<td>599</td>
<td>2.06</td>
<td>68.55</td>
<td>236</td>
</tr>
<tr>
<td>S3</td>
<td>14</td>
<td>Diversity Heights</td>
<td>660</td>
<td>1.81</td>
<td>70.35</td>
<td>94</td>
</tr>
</tbody>
</table>
Identify & Locate - Where are highest concentrations of 4 Primary Market Segments?

<table>
<thead>
<tr>
<th>CD</th>
<th>Count – BLUE Top 4</th>
<th>%</th>
<th>Base Count</th>
<th>Base %</th>
<th>% Pen</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>York (ON), RM</td>
<td>332,485</td>
<td>16.91</td>
<td>1,148,472</td>
<td>10.27</td>
<td>28.95</td>
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<tr>
<td>Durham (ON), RM</td>
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<td>661,462</td>
<td>5.92</td>
<td>41.68</td>
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<td>Halton (ON), RM</td>
<td>261,071</td>
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<td>552,185</td>
<td>4.94</td>
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<tr>
<td>Simcoe (ON), CTY</td>
<td>167,509</td>
<td>8.52</td>
<td>480,527</td>
<td>4.30</td>
<td>34.86</td>
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<td>Waterloo (ON), RM</td>
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<td>550,074</td>
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<tr>
<td>Peel (ON), RM</td>
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<td>6.70</td>
<td>1,438,910</td>
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<tr>
<td>Hamilton (ON), CDR</td>
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<td>5.87</td>
<td>544,918</td>
<td>4.87</td>
<td>21.19</td>
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<tr>
<td>Niagara (ON), RM</td>
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<td>444,420</td>
<td>3.98</td>
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<td>118</td>
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<tr>
<td>Essex (ON), CTY</td>
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<td>400,204</td>
<td>3.58</td>
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<tr>
<td>Middlesex (ON), CTY</td>
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<td>465,115</td>
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<td>Wellington (ON), CTY</td>
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<td>222,312</td>
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<tr>
<td>Brant (ON), CDR</td>
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<td>142,051</td>
<td>1.27</td>
<td>20.95</td>
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</tr>
<tr>
<td>Dufferin (ON), CTY</td>
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<td>1.42</td>
<td>59,554</td>
<td>0.53</td>
<td>46.77</td>
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<tr>
<td>Peterborough (ON), CTY</td>
<td>19,557</td>
<td>0.99</td>
<td>137,923</td>
<td>1.23</td>
<td>14.18</td>
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<tr>
<td>Oxford (ON), CTY</td>
<td>16,719</td>
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<td>111,673</td>
<td>1.00</td>
<td>14.97</td>
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<tr>
<td>Toronto (ON), CDR</td>
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<td>0.77</td>
<td>2,807,424</td>
<td>25.11</td>
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<tr>
<td>Lambton (ON), CTY</td>
<td>15,149</td>
<td>0.77</td>
<td>128,784</td>
<td>1.15</td>
<td>11.76</td>
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<tr>
<td>Elgin (ON), CTY</td>
<td>12,925</td>
<td>0.66</td>
<td>90,167</td>
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<td>14.33</td>
<td>81</td>
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<tr>
<td>Northumberland (ON), CTY</td>
<td>11,735</td>
<td>0.60</td>
<td>84,699</td>
<td>0.76</td>
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<tr>
<td>Haldimand-Norfolk (ON), CDR</td>
<td>10,518</td>
<td>0.54</td>
<td>108,930</td>
<td>0.97</td>
<td>9.66</td>
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<tr>
<td>Muskoka (ON), DM</td>
<td>8,955</td>
<td>0.46</td>
<td>61,855</td>
<td>0.55</td>
<td>14.48</td>
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<tr>
<td>Kawartha Lakes (ON), CDR</td>
<td>8,729</td>
<td>0.44</td>
<td>75,459</td>
<td>0.68</td>
<td>11.57</td>
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<tr>
<td>Chatham-Kent (ON), CDR</td>
<td>7,132</td>
<td>0.36</td>
<td>104,101</td>
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<td>6.85</td>
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</tr>
<tr>
<td>Perth (ON), CTY</td>
<td>6,526</td>
<td>0.33</td>
<td>77,770</td>
<td>0.70</td>
<td>8.39</td>
<td>48</td>
</tr>
</tbody>
</table>
What are the gaps, how to fill them?

Is this information useful to Industry and/or DMOs /Municipalities?
How does it relate to what is happening on the ground?
What are the gaps?
How can we work together to fill the gaps?

<table>
<thead>
<tr>
<th>Supply</th>
<th>Challenges - Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grey County Tourism Operator Database</td>
<td>Are supply side metrics relevant to businesses?</td>
</tr>
<tr>
<td>OMAFRA Analyst Canadian Business Patterns</td>
<td>Lots of discrepancy in definition of “Tourism Industry” and “Tourism Jobs”.</td>
</tr>
<tr>
<td></td>
<td>Challenge in determining economic impact of tourism at County or even Municipal level.</td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DMO partners working together to get a “dashboard” of metrics we can collect and understand.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Demand</th>
<th>Challenges - Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grey County Tourism Attraction/Event survey</td>
<td>Limited # of participants, not geographically representative of the county, includes residents as well as visitors, does NOT include most of our Tourism Industry.</td>
</tr>
<tr>
<td>GCT Web Analytics &amp; Campaign</td>
<td>Doesn’t measure actual visitors, just response to campaigns. Who is really visiting?</td>
</tr>
<tr>
<td>OMTCS Regional Tourism Profile</td>
<td>Not current – usually 3 year delay.</td>
</tr>
<tr>
<td></td>
<td>+/- 7% accuracy at BruceGreySimcoe region, on +/- 14% accuracy at Grey County</td>
</tr>
<tr>
<td></td>
<td>Custom Analysis to get meaningful activity data.</td>
</tr>
<tr>
<td></td>
<td>Only domestic market for Grey County.</td>
</tr>
<tr>
<td>PRIZM Segmentation</td>
<td>Is a powerful tool, is proprietary (expensive) and takes time to understand and benefit from.</td>
</tr>
<tr>
<td>Mobility Data</td>
<td>Pilot project is underway to “kick the tires” with mobility data to determine if this is a useful tool.</td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tourism Action Plan calls for annual business survey to obtain key visitor data. Are businesses interested in these metrics enough to participate? If so, how frequently – by season?</td>
</tr>
<tr>
<td></td>
<td>PRIZM analysis could be offered by GCT as a tool for businesses/DMOs in exchange for some aggregation of high-level results.</td>
</tr>
</tbody>
</table>