Tourism Advisory Committee
January 24, 2018 – 10:00 AM
Heritage Room, Grey County Administration Building

1. Call to Order
2. Welcome to New Members
3. Election of the Chair and Vice-Chair
4. Declaration of Pecuniary Interest
5. Business Arising from the Minutes
   a. Resolution TAC03-17 from the October 11th, 2017 Tourism Advisory Committee meeting (Referred back by Committee of the Whole to Tourism Advisory Committee for further review)

   That Grey County support and encourage the adoption of a license plate for cyclists and that the revenues from licensing be spent on cycling benefits such as shoulder paving.

6. Reports – CAO
   a. CAOR-TAC-05-18 Tourism Research and Data Analyst Project

      That Report CAOR-TAC-05-18 be received; and

      That the Tourism Research and Data Analyst project be supported and that staff be directed to move forward in securing further project partners and funding; and

      That staff will bring a report to County Council once the project is finalized, and that Grey County’s contribution to this project be funded from the Tourism Reserves as a one-time project up to $20,000.

7. Destination Development Action Plan
   i. 2017 Year End Report Card
   ii. SWOT & Trends – 2018 Marketing & Destination Development Strategy
8. Labour Market Task Force Update – Andrew Siegwart

9. Municipal Accommodation Tax
   i. Tourism Industry Association of Ontario (TIAO) FAQs

10. Other Business

11. Next Meeting Dates
   a. To be determined

12. Adjournment
Recommendation

1. That Report CAOR-TAC-05-18 be received; and

2. That the Tourism Research and Data Analyst project be supported and that staff be directed to move forward in securing further project partners and funding; and

3. That staff will bring a report to County Council once the project is finalized, and that Grey County’s contribution to this project be funded from the Tourism Reserves as a one-time project up to $20,000.

Executive Summary

Grey County Tourism and Regional Tourism Organization 7 (RTO7) propose a one-year Tourism Research and Data Analyst Project. Lack of reliable and timely tourism data has been widely recognized at the local, provincial and national levels, and within Grey County’s Tourism Destination Development Action Plan. Project costs still have to be finalized and are estimated at $100,000 - $120,000, with Grey County contributing $20,000 from Tourism Reserves.

Background and Discussion

Lack of reliable and timely tourism data has been widely recognized at the local, provincial and national levels. A recent Rural Tourism Symposium confirmed tourism data as one of the top challenges facing rural destinations. Grey County’s Destination Development Action Plan (DDAP) recognized this challenge, and sets out recommendations under Pillar 3, Market Research and Tracking, namely the development of a “scorecard” based on compiling data from secondary sources and undertaking an annual operator survey to collect primary data on
visitors and trends. At Grey County’s first Lets Talk Tourism session in September 2016, the Tourism Manager presented some of the current data sources, gaps and opportunities in Pillar 3: Market Research & Tracking Background.

Over the past two years Grey County has made progress in accessing readily available tools (Statistics Canada, Ministry of Tourism Regional Profiles and Activity Reports, Ontario Ministry of Agriculture Food and Rural Affair’s Analyst) and in purchasing licenses for third party tools such as Environics PRIZM, STRAVA (cycling data) and in delving deeper into our website and social media metrics to understand on-line search and interest in Grey County. An annual cycling business survey and a survey of larger events and attractions have been undertaken for several years.

Results to date include:

- Development of an online cycling map that includes a layer of cyclist volumes based on STRAVA data;
- An overview of Cycling in Grey County that assisted the Transportation Services department in their research into the benefits of paved shoulders, and;
- Creation of a BLUE cluster backgrounder that identified the top 4 PRIZM segments to Blue Mountain, based on aggregating data from several businesses, and then using this analyst to assist South Georgian Bay in geo-targeting high potential areas for direct distribution of their See & Do guide.

This same approach will be used this year for a direct distribution of our Grey County Map into high potential areas. We will be conducting an operator survey shortly to collect data on 2017 performance to complete our Tourism Snapshot.

The Tourism Manager spends about 25% of his time in market research and tracking and results are limited to DDAP deliverables and a few select projects. There is a huge opportunity to more fully leverage our existing licenses, look more deeply into other data sources including some of the potential applications of Big Data (financial services, mobile, etc.) and to develop a more fulsome understanding of our tourism visitors and potential markets.

Tourism Research & Data Analyst Project

Grey County Tourism and Regional Tourism Organization 7 (RTO7) propose a one-year Tourism Research and Data Analyst Project to undertake this work, and to create templates and outputs that can be shared with tourism industry and municipal partners. Grey County Tourism and RTO7 would like to secure a third partner for this project and hope to do so shortly. Once all partners are in place, we will jointly refine the scope, deliverables and budget of the project, and apply for senior government funding. Grey County Tourism would provide office space and supervision of this project on behalf of the other partners. Grey County recently hired a Planning Data Analysis Coordinator (PDAC.) The PDAC currently is working on a number of projects for the Children’s Services department and there is some time that can be devoted to providing advisory assistance for this project. Between the PDAC and our GIS staff, we have some excellent advisor capability, as well as building the projects outputs into GIS mapping if applicable, and a legacy plan once the project is completed.

Potential Data Sources and Work
Envionics PRIZM analysis – While RTO7 and Grey County have done a fair bit of work in PRIZM, we are not fully leveraging our license or insights. A full time data analyst could significantly improve the quality and quantity of results and insights and lead to more engagement and sharing of results with partners. Data typically comes from accommodators, attractions, businesses, events and reports provide market segmentation, media preferences and behaviour. Tracking trends over time is also key. While the 2018 Envionics license is in place for all of Ontario, the project would pay for a Quebec license to allow insights into current and potential visitors from Quebec.

Economic Impact of Tourism – Jobs, expenditures, taxes generated. Tourism is a hard industry to define and measure, and often is not widely understood. OMAFRA’s Analyst program provides business counts, jobs, and recently an input-output model. More work needs to be done on getting a uniform definition of and understanding of tourism, as a sector to compare with other sectors, and of the value chain that relies on inputs from many other sectors. This project would look at all available data sources: Census (National Household Survey), Taxfile Data, Business Counts, County Assessment, etc…. to better define tourism volume, value and change over time. Potential to create a template of economic impact for understanding by Destination Marketing Organization’s (DMOs) in BruceGreySimcoe, and this could have applicability across Ontario.

South Georgian Bay Labour Market Task Force – This project would support the SGBLM Task force with insights into tourism expenditures, economic impact, trends, workforce issues.

Big Data - Smart Technology – Grey County’s finish as a Top 7 Intelligent Community in 2017 demonstrated that we have many innovative and forward thinking businesses, communities and government organizations. Kicking the tires with big data for better understanding of our tourism and economic development trends and opportunities is another opportunity with this project. Financial services and mobile data are two potential sources among many. Assessing the capability and cost of these sources and potentially purchasing some data depending on budget is within the project scope.

Financial and Resource Implications

One Year Project – Commencing in May, 2018

Draft Budget: Minimum $ 100,000 to maximum $120,000 (depending on partner contribution and funding source and leveraging)

Revenues
Grey County $20,000
RTO7 $20,000
3rd partner $10,000 - $20,000
Government Funding $50,000 - $60,000

Costs
Analyst Salary and Benefits $80,000
Computer, office overhead, travel $5,000
Data Licenses $15,000 - $35,000

The Tourism Manager would supervise the Data Analyst with office space and payroll provided by Grey County. Some advisory assistance is requested from the Planning Data Analyst contingent on workload and availability. Grey County’s contribution of $20,000 will come from Tourism Reserves as a one-time project, with no impact on the 2018 tax levy. Tourism’s Reserve balance is currently $142,066.

Relevant Consultation
☒ Internal (Director of Planning)
☒ External (RTO7 Executive Bill Sullivan)

Appendices and Attachments

Pillar 3: Market Research & Tracking Backgrounder.
GREY COUNTY TOURISM
DESTINATION DEVELOPMENT ACTION PLAN
2017 REPORT CARD
January 24, 2018

METCALFE ROCK

Grey County
Colour It Your Way
MISSION
To encourage tourism development and marketing across Grey County to contribute to economic prosperity and higher quality of life in our communities through:

• Actively engaging with industry stakeholders to develop new tourism experiences, strengthen Grey County as a preferred destination, provide excellent customer service, and market Grey County to our chosen visitor markets.

• Aligning with strategic business partners from Grey, Bruce, Simcoe, and beyond to develop and promote regional experiences and destinations.

• Undertaking market research, tracking results in our visitor markets, and evaluating their economic impact upon Grey County.

BACKGROUND
Grey County’s Tourism Destination Development Action Plan (Action Plan) was approved by County Council on July 5, 2016. We began implementation of the plan immediately, and hosted our second “Let’s Talk Tourism” event on September 20, 2017.

Over the past year Grey County Tourism and its partners have worked hard on the plan’s recommendations under its four pillars, with our Tourism Advisory Committee monitoring progress of the plan through quarterly scorecards.

This Report Card is our report back to our industry partners and stakeholders and a big THANK YOU for a very strong year in tourism.

VISION
“Welcoming Destinations and great experiences make Grey County the natural place to visit and live.”

KEY DIFFERENTIATOR
“Grey County is a true four-season rural destination with exceptional natural assets, a strong emerging food and beverage scene, two hours from the Greater Toronto area, and the only County in Ontario with a world-class ski resort within its boundaries.”
DDAP 2016 FOUR PILLARS

THE DDAP’S GOAL

Increase sustainable tourism revenues through managing & marketing Grey County as a tourism destination.

COMMUNITY ENGAGEMENT  DESTINATION MANAGEMENT  MARKET RESEARCH & TRACKING  RESOURCE ALLOCATION

GREY COUNTY TOURISM PRIORITY CALENDAR FOR DDAP - 2017

Priority Levels:
1 = Accomplish in first and second quarters, Year 1 (Urgent)
2 = Accomplish in third and fourth quarters, Year 1 (Immediate)
3 = Accomplish in Year 2 (Timely)

<table>
<thead>
<tr>
<th>Priority Level</th>
<th>Year 2: 2017</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Q1: Jan-Mar</td>
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<tr>
<td>Q1: Jan-Mar</td>
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<tr>
<td>Q1: Jan-Mar</td>
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<tr>
<td>Q1: Jan-Mar</td>
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<tr>
<td>Q1: Jan-Mar</td>
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Pillar 1 - Community Engagement
1. Clean Up and Maintain the Grey County Tourism Stakeholder Database
2. Build a Simple Stakeholder Communications Plan
3. Relaunch "Tourism Talks"
4. Make the Industry Website a Useful Tool and Resource

Pillar 2 - Destination Management
1. Create a Robust Marketing and Communications Plan
2. Embrace the Brand
3. Create a Visiting Friends and Relatives (VFR) Marketing and Communications Campaign
4. Create a Grey County Tourism Mobile Application
5. Facilitate Creation of Packages & Itineraries
6. Create a Simple Experiential Outbound Tour Operator Strategy

Pillar 3 - Market Research & Tracking
1. Track the Success of the DDAP
2. Track Key Quantitative and Qualitative Metrics and Economic Impact of Tourism
3. Create Profiles of Target Market Audience Groups Using Both Demographics and Psychographics

Pillar 4 - Resource Allocation
1. Reorganize Tourism Staff Functions
2. Invest in Professional Development

Priority Level
1 = Accomplish in first and second quarters, Year 1 (Urgent)
2 = Accomplish in third and fourth quarters, Year 1 (Immediate)
3 = Accomplish in Year 2 (Timely)
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. For this to be effective, the County’s industry database must be current, the industry website must be easy to access and useful, and the County must organize networking events to bring the tourism industry together.

### PILLAR 1: COMMUNITY ENGAGEMENT

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
<th>GOAL/TARGETS</th>
<th>COMPLETED / RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Clean up and maintain the Grey County Tourism Stakeholder Database</td>
<td>Ensure the foundations for stakeholder outreach is strong.</td>
<td>A clean database of 849 tourism businesses, tourism organizations and natural areas.</td>
</tr>
<tr>
<td>2. Build a simple stakeholder communication plan</td>
<td>Create a steady flow of information from Grey County to stakeholders to provide valuable news and information.</td>
<td>Tourism Partner Communications Plan 2017 completed.</td>
</tr>
<tr>
<td></td>
<td># of Subscribers: 636 (Sept 2016)</td>
<td>673 (December 2017)</td>
</tr>
<tr>
<td></td>
<td># of Newsletters/year: 4</td>
<td>4 &amp; 44 other communications</td>
</tr>
<tr>
<td></td>
<td>Open Rate of newsletter: 25%</td>
<td>34% (Average 2017)</td>
</tr>
<tr>
<td>3. Relaunch “Tourism Talks”</td>
<td>Create a strong sense of community and encourage partnerships and collaboration among tourism stakeholders.</td>
<td>2017: 10 events over 11 days</td>
</tr>
<tr>
<td>Hosted monthly education and networking events</td>
<td># events held: 12</td>
<td>2017: 469</td>
</tr>
<tr>
<td></td>
<td>Attendee #’s: 300</td>
<td>Excellent</td>
</tr>
<tr>
<td></td>
<td>Feedback: Very Satisfied</td>
<td></td>
</tr>
<tr>
<td>4. Make the industry website a useful tool and resource</td>
<td>Remove barriers for stakeholders to access critical information.</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td>Website Visits: 5% &gt; baseline</td>
<td>1313 Unique pageviews (↑ 8.3%)</td>
</tr>
<tr>
<td></td>
<td>Length of stay: 5% &gt;baseline</td>
<td>1678 pageviews (↓ 3.5%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2:15 mins (↓ 13%)</td>
</tr>
</tbody>
</table>
WINTER EXPERIENCE CRAFTING – “Thanks for providing the space and environment for industry professionals to connect, collaborate and network.”

HOW TO LEAD MILLENNIALS – “Amazing presentation and speaker. There was a lot of valuable information there!”

MAKE THE MEDIA WORK FOR YOU – “Thanks for everything you do! Liz is a fantastic speaker!”

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**GREY COUNTY INDUSTRY SESSIONS 2017**

<table>
<thead>
<tr>
<th>DATE</th>
<th>LOCATION</th>
<th>SESSION</th>
<th>ATTENDANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>February</td>
<td>Throughout</td>
<td>Winter Fam Tour</td>
<td>25</td>
</tr>
<tr>
<td>February</td>
<td>Owen Sound</td>
<td>How To Lead Millennials</td>
<td>55</td>
</tr>
<tr>
<td>March</td>
<td>Clarksburg</td>
<td>Make The Media Work For You</td>
<td>19</td>
</tr>
<tr>
<td>April</td>
<td>Meaford</td>
<td>Measuring Success Within Your Business and</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Developing and Measuring Marketing Success</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>Blue Mountain Resort</td>
<td>Annual Grey Bruce Brochure Swap</td>
<td>119</td>
</tr>
<tr>
<td>June (2 days)</td>
<td>Throughout</td>
<td>Summer Fam Tour</td>
<td>52</td>
</tr>
<tr>
<td>August</td>
<td>Throughout</td>
<td>Local Media Fam Tour</td>
<td>10</td>
</tr>
<tr>
<td>September</td>
<td>Kimberley</td>
<td>Let's Talk Tourism &amp; Industry Appreciation</td>
<td>25</td>
</tr>
<tr>
<td>October</td>
<td>Thornbury</td>
<td>Today's Social, Mobile &amp; Connected Consumer</td>
<td>40</td>
</tr>
<tr>
<td>November</td>
<td>Blue Mountain Resort</td>
<td>BruceGreySimcoe - Un-Conference</td>
<td>112</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TOTAL ATTENDANCE</td>
<td>469</td>
</tr>
</tbody>
</table>
At the core of the Action Plan is the product development and marketing of the County that differentiates the County from its competition. The Action Plan recommends creating a marketing strategy that brings the brand to life through innovative marketing and communications channels, such as a mobile app and outreach to domestic and international tour operators. Furthermore, it recommends coordinating product and experience development that is in line with the market needs through identification of key experiences, such as cycling and food tourism and coordinating a visiting friends and relatives (VFR) campaign.

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
<th>GOAL/TARGETS</th>
<th>COMPLETED / RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Create a robust marketing plan</td>
<td>Lay the foundation for an integrated marketing and communications promotion of the destination.</td>
<td>Summer &amp; Fall 2017 Marketing Campaign was developed, targeted to locals, VFR. The Colouring It My Way Series ran from July to October.</td>
</tr>
<tr>
<td></td>
<td>Social Media Metrics; (5% incr.) Facebook Likes:</td>
<td>17,792 (↑ 10% from 2016)</td>
</tr>
<tr>
<td></td>
<td>Twitter Followers:</td>
<td>3,897</td>
</tr>
<tr>
<td></td>
<td>Instagram Followers:</td>
<td>2,637</td>
</tr>
<tr>
<td></td>
<td>Visitgrey.ca Metrics:</td>
<td>See next page</td>
</tr>
<tr>
<td></td>
<td>Consumer Newsletter;</td>
<td>3,411 (↑ 10% from 2016)</td>
</tr>
<tr>
<td></td>
<td># of Subscribers:</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td># of Newsletters/year: 4</td>
<td>33% average</td>
</tr>
<tr>
<td></td>
<td>Open Rate of newsletter: 24%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Weekly Events Newsletter;</td>
<td>996</td>
</tr>
<tr>
<td></td>
<td># of Subscribers:</td>
<td>33% average</td>
</tr>
<tr>
<td></td>
<td>Open Rate of newsletter:</td>
<td></td>
</tr>
<tr>
<td>2. Embrace the brand</td>
<td>Develop a powerful positioning and sales tool for Grey County and its partners</td>
<td>Brand Style Guide &amp; Toolkit developed for internal use and content creators (April 2017) A second Style Guide ‘Summary’ was created for stakeholders.</td>
</tr>
<tr>
<td>3. Create a Visiting Friends &amp; Relatives (VFR) marketing and communications campaign</td>
<td>Campaign to support VFR hosts and leverage the many relatives and family friends who visit Grey County</td>
<td>The Colouring It My Way Series campaign was well received by Grey County residents. Local pride and awareness was up on social media.</td>
</tr>
<tr>
<td>4. Create a Grey County Tourism mobile application</td>
<td>Create a robust information portal for travel consumers in the planning phase and while in-market</td>
<td>Grey County Map produced and County GIS information was updated/populated.</td>
</tr>
</tbody>
</table>
In April we created the first ever Grey County Tourism Brand Style Guide. This guide explains how we represent ourselves to the world. It’s a reference tool to ensure that the Grey County Tourism brand looks, feels, and sounds the same wherever and whenever it’s used. The original guide was created for our content creators – graphic designers, photographers, videographers, bloggers, etc. We have since discovered that many other industry partners, stakeholders and local ambassadors have an interest in this guide and it’s beautiful details, so we’ve created a Summary to distribute further as a reference guide. If you would like a copy, please let us know by emailing industry@visitgrey.ca.
Summer and Fall Media Highlights

Curious Creature, Solmaz – A Girl Friends Getaway- Scandinave Spa and Grey County InstaMeet (July 2017)

<table>
<thead>
<tr>
<th>Channels</th>
<th>Followers</th>
<th>Likes/Views</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>7,259</td>
<td>1,782</td>
<td>13</td>
</tr>
<tr>
<td>Instagram</td>
<td>12,000</td>
<td>1,134</td>
<td>209</td>
</tr>
<tr>
<td>Blogpost</td>
<td>9,000</td>
<td>1,982</td>
<td>2</td>
</tr>
</tbody>
</table>

Ontario Culinary Tourism Alliance, Agatha Podgorski – Grey County Will Give You All The Feels (August 2017)
Blogpost - https://ontarioculinary.com/grey-county-will-give-you-all-the-feels/

<table>
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<tr>
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<th>Likes/Views</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter</td>
<td>9,258</td>
<td>25 (4 posts)</td>
<td>13 (retweets)</td>
</tr>
<tr>
<td>Instagram</td>
<td>11,000</td>
<td>594 (7 post)</td>
<td>10 (7 posts)</td>
</tr>
<tr>
<td>Blogpost</td>
<td>200K</td>
<td>1,850</td>
<td>1</td>
</tr>
</tbody>
</table>

I’ve Been Bit, Lindsay Davies– Fall For Grey County With This Amazing Autumn Guide (September 2017)
Blogpost - http://ivebeenbit.ca/grey-county-fall-autumn-guide/

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<th>Likes/Views</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter</td>
<td>4,414</td>
<td>154</td>
<td>15</td>
</tr>
<tr>
<td>Instagram</td>
<td>2,521</td>
<td>1,206</td>
<td>140</td>
</tr>
<tr>
<td>Blogpost</td>
<td>2,932</td>
<td>105</td>
<td>3</td>
</tr>
</tbody>
</table>

- This is based on social media and blogposts that performed well during the summer and fall season.
- 10 media were hosted between July 1 and October 1, 2017 and 21 in all of 2017
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.

<table>
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<th>KEY ACTIVITIES</th>
<th>GOAL/TARGETS</th>
<th>COMPLETED / RESULTS</th>
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</table>
| 1. Track success of the Action Plan | Measure Success | 2016 DDAD Actions Completed to County Council (Feb. 2017)  
# Completed Scorecards:4/yr  
2 Scorecards to TAC (April & June)  
Report Card to Industry Partners & TAC Sept 2017  
2017 Final Report Card to TAC Feb 2018 |
| 2. Track key quantitative and qualitative metrics and economic impact of tourism | Provide Data of strategic importance to stakeholders | 2016 Grey County Cycle Business Tourism Survey Completed (March)  
2012-16 Attendance at Select Grey County Events & Attractions completed (April)  
2017 business survey to be completed (Feb 2018) |
| 3. Create profiles of target market audience groups using both demographics and psychographics | Provide actionable data and market insights to stakeholders | Reports produced for “Blue Cluster” businesses, BMVA & GTTA identifying target segments |
Bannikin reviewed the roles and responsibilities of Grey County Tourism staff, and recommended a reorganization of staff functions to increase efficiency of County staff, and to ensure that initiatives are clearly lead by one staff member, which will increase overall effectiveness and accountability. Grey County Tourism has a dedicated team, and investing in their professional development should be a priority.

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<th>COMPLETED / RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reorganize tourism staff functions</td>
<td></td>
<td>Staff tasks realigned as directed in Action Plan with modification that Tourism Manager returns to department full time and Special Projects position contemplated in plan is not filled All Tourism positions received new job descriptions (September)</td>
</tr>
<tr>
<td>2. Invest in professional development</td>
<td>Continually build internal capacity and a culture of excellence # conferences/training sessions: 3 # webinars attended by staff: 9 # presentations given by staff: 3</td>
<td>5 - TMAC AGM &amp; Conference, Ontario Travel Information Centres Conf., Ontario Tourism Summit, Environics Analytics User conf., BruceGreySimcoe Un-conference 7 incl. Environics Analytics, Roger Brooks, Destination Canada 4 - Silver C's, Church group, OSDSS Travel &amp; Tourism class, Ontario Tourism Summit panel</td>
</tr>
</tbody>
</table>
From a Tourism standpoint, I think it has been stellar year for Grey County. We have developed a new DDAP that is already shaping the face that Grey County shows the rest of the world. As a stakeholder in Grey County I am excited at the future. The team at Grey County Tourism has done a remarkable job at getting our message out and bringing new visitors.”

Gary Gingras
CEDARS OF LAKE EUGENIA
CHAIR - GREY COUNTY TOURISM ADVISORY COMMITTEE
Thanks for a Grey’t year in Tourism!
As part of the 2016 Destination Development Action Plan, in partnership with our stakeholders, we developed a SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis of Grey County as a tourism destination. We would like to update this, as part of our 2018 Marketing Strategy. We have already added some points below, highlighted in green, and would like to include your input.

**Strengths**

1. Natural assets: unique nature and environmental features
2. Four seasons: Distinct seasons with different tourism experiences offered year round
3. Blue Mountain: Iconic and well-known demand generator
4. Food and agri-tourism: unique food products and flavours
5. Culture and history: a defined history with compelling stories
6. **Organizational stability**

**Weaknesses**

1. Soft infrastructure: limited signage, parking and washrooms
2. Few accommodation options available outside of Blue Mountain and Owen Sound
3. Limited restaurant and retail options, with reduced hours of operation
4. **Regional Transportation and transit very limited**

**Opportunities**

1. Growing agri-tourism
2. Better collaboration with local DMOs, neighbouring counties and RTO7
3. Visiting Friends and Relatives (VFR) as focused target market
4. Better packaging and itinerary development
5. The US Market

**Threats**

1. Weather/climate change
2. Limited development/adoption of Grey County brand
3. **Limited collaboration with peer DMOs**
4. Workforce Issues
5. Monitor new and growing competitive national tourism organizations
6. **Over-tourism and capacity issues in select areas**
In addition to the SWOT analysis, we have been researching some of the new trends that are happening amongst travelers and consumers. We would like your input here as well, on any trends that you are seeing.

**Top Travel Marketing Trends for 2018:**

- Mobile platforms and responsive websites are the primary engagement platform for travelers. * 60% of web traffic to visitgrey.ca came from mobile & tablet users in 2017.

- Travelers are demanding more information, control, interaction, and personalization. I.e: customized and experiential travel.

- Visitors are increasingly looking for a travel experience that allows them to experience a local’s way of life. “Locavore”

- Technology is enabling faster decision-making by customers, thereby, increasing business to a destination. Google Business listings are key.

- Marketers have to speak to their niche markets directly, using key messages crafted specifically for that audience. Gone are the days of mass marketing.

- Visitors want access to information while they’re here. There’s a need for wifi and high speed internet while they travel.

- User-generated content through blogs, photos & video.

- Frontline staff interactions with visitors are essential in a hi-tech world. Visitors to Grey County expect friendly, welcoming locals, kindness and superior customer service.

- Social Media platforms, specifically images and video have now become the biggest way to connect with potential visitors. Live videos are big.
South Georgian Bay
Tourism Industry
Labour Supply Task Force

Key Discussion Points

1. Tourism Industry at a Glance
2. Employment Impact
3. Scope of Labour Shortage
4. Challenges & Risks
5. Key Recommendations & Next Steps
Tourism Industry at a Glance

**Economic Impact of Tourism in Ontario:**

- $32.3 billion in annual receipts
- 389,000 employees
- 186,000 businesses
- $4.9 billion in Ontario tax revenues
- 141 million annual visits

**Bruce/Grey/Simcoe:**

- 1400 tourism businesses & 17000 employees

**Eight Sectors of Tourism Employment:**

- Accommodation
- Adventure & Recreation
- Attractions
- Events & Conferences
- Food & Beverage
- Tourism Services (Retail)
- Transportation
- Travel Trade
Tourism Industry at a Glance

Business Disciplines:
- Entrepreneurship
- Marketing & Sales
- Human Resources
- Finance
- Technology
- Operations
- E-Commerce
- Security

Complementary Sectors:
- All Trades & Services
- Real Estate & Construction
- Landscape Architecture & Service
- Transportation
- Arts & Culture
- Property Management
- Agriculture / Beverage – Local Producers
- Legal/Administration
- Food Producers & Local product manufacturers
Tourism Industry at a Glance (2012)

**Employment:**
- Full Time 64%
- Part Time 36%
- Year Round 56%
- Seasonal/Part Year 44%

**Age:**
- 15-34 50%
- 35-54 35%
- 55+ 15%

**Gender:**
- Male 49%
- Female 51%

**Education:**
- No high school – 19%
- High School – 35%
- Apprenticeship – 9%
- College Level – 18%
- University Certificate – 4%
- University Bachelors Degree – 11%
- Post Graduate 4%
Labour Market Factors Shaping Labour Shortage

• Since 2004, regional labour force has dropped by **11%** or **18,700** people
• Population aging & out-migration are primary causes
• 25 to 54 experiencing dramatic declines.
• Bruce County & Grey County tend to lose residents from 18 to 44 age groups
• 18-44 age group participates in labour market higher than provincial average
• Most tourism employers are under staffed – est. 700 short pre-winter 2017*
• More shortages pre-winter 2018*

*Tourism Employers across South Georgian Bay
Labour Market Factors Shaping Labour Shortage

• This is projected to continue for the next 10 to 20 years.
• High regional rates for residents aged 55 plus.
• Shortages at front lines, first level supervision & specialized roles most acute
• Key sectors impacted: Tourism, Transportation, Manufacturing & Construction

The Bottom Line:
Today’s South Georgian Bay labour pool is not meeting employment & economic growth demands of Tourism & other key industries driving our economy!
Local Economic Factors Shaping Labour Shortage

• **Housing costs on the rise** across South Georgian Bay & low inventory of attainable &/or starter family residences

• Lack of **transit** strategy and network regionally to support free flow of workers & visitors

• Lack of regional post-secondary tourism **programs** to keep students home & to recruit from away

• Multiple jurisdictions (County/Municipal): **lack of regional economic strategy**

• Lack of understanding of the true scope of the **tourism industry** and its **impact on employment & regional economy**

• Competition for labour heating up as shortages impact entire Province

• Need for local family supports to encourage workforce participation, i.e., **childcare**
Economic Risks

- Lack of ability to properly service growing demand will equal **lost revenue**
- Employers de-marketing, **decreasing traffic & visitation** to match capacity could have a serious impact on secondary businesses and/or pace of growth
- Service decline could have negative impact on **regional brand**
- Declining investment and growth in new businesses would **stall tax growth**
- Decline in service levels and lifestyle benefits our industry provides to locals could negatively impact **real estate values & residential growth**
- Larger employers who can afford it will raise wages to attract the best employees, causing heightened **competition & wage compression** that will negatively impact small businesses, entrepreneurs, and all other local employers
Recommendations

1. Develop Diverse Real Estate/Attainable Housing Strat
2. Invest in Regional Transit Connectivity
3. High School Outreach
4. Support Post-Secondary Tourism Programming
5. Strengthen Regional Operator Learning Networks, Best Practices and Benchmarking
6. Flexible Child Care
What Has Been Done?

- Four County Labour Board Tourism Sector Labour Market Research
- Childcare town hall meeting & survey
- TOBM Business in Motion event in Collingwood focused on housing & transit to engage business community
- RT07 developing tourism owner/operator training & mentorship program
- Development industry consultation
- Talks with municipal planning teams
- Community relations & outreach to ensure residents as well as businesses are aware of the challenges and risks
What’s Next?

- Transit forum to be hosted in Collingwood
- Employer One survey & more East SGB data
- Launch RFP to hire housing consultant to create business case for attainable housing (dorms, apartment rentals, condos, starter homes, family homes):
  - Interview employers & employees
  - Assess best practices (i.e., Whistler)
  - Assess municipal readiness
  - Propose development incentives & frameworks to attract builders
- Present business case to Province, County, Municipalities & development sector by June 2018