

# Town of Collingwood

TOURISM MASTER PLAN



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# 04

## Acknowledgements



For more than 15,000 years, the First Nations walked upon, and cared for, the lands we now call home. Anishinaabek, Haudenosaunee, Ojibwe, and many others who were families, friends, and communities, the way we are today. The Town of Collingwood acknowledges the Lake Simcoe-Nottawasaga Treaty of 1818 and the relationship it establishes with the original inhabitants of Turtle Island. We acknowledge the reality of our shared history, and the current contributions of Indigenous people within our community. We seek to continue empowering expressions of pride amongst all of the diverse stakeholders in this area. We seek to do better, and to continue to recognize, learn, and grow, in friendship and community, Nation-to-Nation.

In our Tourism Master Plan, we have identified guiding principles that are foundational to our work moving forward. These should be read into every aspect of the plan. Going forward, an important guiding principle is our commitment to work towards reconciliation by using tourism as a tool for truth-telling and reconciliation. This means that we will work towards meaningful engagement and strengthen our relationship with all Nations with a current or historic interest in our geography, including Saugeen Ojibway Nation, Chippewas of Saugeen First Nation and Chippewas of Nawash Unceded First Nation, as well

as with Indigenous-led organizations in Collingwood and beyond, such as the Georgian Bay Indigenous Circle, and Indigenous Tourism Ontario. We seek to do better, to continue to recognize, learn, and grow, in friendship and community, Nation-to-Nation.

Collingwood's Tourism Master Plan is the result of an inclusive, stakeholder-driven, and community-based participatory research process that strived to engage a diversity of stakeholders in the community. We thank the residents, business owners and operators, organizational representatives, tourism partners, and the Mayor and Councillors, who participated in the survey, interviews, table talks, and community focus groups. This Tourism Master Plan would not have come together without your input and feedback.

We would also like to thank the internal project steering committee, including Summer Valentine, Director of Planning, Building & Economic Development; Karen Cubitt, Director of Parks, Recreation and Culture; Johanna Griggs, Manager of Economic Development; Karen Clegg, Economic Development Coordinator, and Bill Sullivan, Chief Executive Officer of Regional Tourism Organization 7: BruceGreySimcoe for providing important insights, perspectives, and direction on the Tourism Master Plan.

Finally, thanks are due to the Province of Ontario and Regional Tourism Organization 7: BruceGreySimcoe (RTO7) for their funding contributions to this project. The views included in this document do not necessarily reflect those of RTO7 or the Province.

The Town of Collingwood is proud to present the Town of Collingwood Tourism Master Plan that will guide municipal work in tourism management, development, and marketing over the next 3+ years. The journey to develop this plan began in February 2024 and involved the formation of an internal project steering committee as well as stakeholder-driven, and community-based participatory research.

The Town looks forward to taking a more active role in growing tourism for the benefit of the community!

## Contact

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*The development of the Town of Collingwood Tourism Master Plan was facilitated by the team at Bannikin.*



BEYOND TRAVEL & TOURISM

# 07

## At a Glance



## About the Plan

The Town of Collingwood Tourism Master Plan is the result of an inclusive, stakeholder-driven, and community-based participatory research process that engaged residents, business owners and operators, organizational representatives, tourism partners, and the Mayor and Councillors.

An internal project steering committee was established at the start of the project to inform and oversee the development of the Tourism Master Plan.

The goal of the plan development process was to produce an evidence based and actionable tourism master plan to guide the work of the Town of Collingwood over the next 3+ years.

**Primary and secondary research methods were used to gather information, insight, and input, including:**

- + Background document review
- + Global trends and good practice research
- + Market research
- + Jurisdictional scan
- + Industry and resident survey
- + Key informant interviews
- + Industry table talks and community focus groups
- + Community open house





# What We Know

The visitor is “someone who takes an overnight out-of-town trip, or who takes an out-of-town same-day trip of 40 kilometres or more away from their home” (Ministry of Tourism, Culture and Gaming).

Sustainable tourism development is “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” (United Nations World Tourism Organization).



## Trends and Good Practices

- + Digital nomadism and home swapping
- + Shoulder season travel and cool-cationing
- + Skip-generational, multi-generational, and private group travel
- + Astrotourism, dark sky tourism, wellness, and silent travel

## Important Perspectives and Good Practices

- + Prioritizing diversity, equity, and inclusion
- + Working through a living systems lens
- + Being realistic about regeneration
- + Committing to destination stewardship
- + Designing for the future

## Factors Affecting Tourism

**Politically:** the role of organizations working in the tourism sector, including municipalities, is shifting.

**Economically:** the bulk of travel spending is done close to home.

**Socially:** although most Canadians plan to take their “big trip” in July, August, and May/June, Canadians aged 60 and up are likely to plan their trip for September.

**Technologically:** data analytics is becoming increasingly important for organizations working in the tourism sector.

**Legally:** the federal government has imposed a 2-year cap on international student permit applications.

**Environmentally:** climate change will continue to fuel uncertainty as its impacts intensify and become more pronounced in the coming years.

## Ecosystem Actors

The local, regional, provincial, national, and international tourism landscapes are made up of diverse ecosystem actors that collectively support different aspects of the tourism sector, together forming a governing structure for tourism in their respective destinations. Roles for these different actors include marketing and promotion; destination management; education, capacity-building; development; and advocacy.

## Municipal Accommodation Tax

MAT consultations have taken place and the proposed framework outlined by the Town provides a solid foundation from which to generate sustainable revenue for the implementation of this Tourism Master Plan.



## What We Heard

**Environment and Climate Change:** the Town must be proactive in its response to the impacts of climate change in the destination.

**Sustainable Development of Tourism:** a sustainable tourism development approach is needed. One that recognizes and addresses the impacts of tourism on our environment, society, and economy.

**The State of the Tourism Industry:** the tourism industry is important and valued but also facing many challenges, including those linked to the region, like transportation, housing, workforce, and climate change.

**Partnerships and Collaboration:** the sustainable development of tourism requires partnership and collaboration to minimize costs and maximize outcomes.

**Tourism Assets, Activations, and Experience Development:** Collingwood is home to unique tourism assets that can be better leveraged in the development of experiences and activations that span across the year.

**Marketing and Communications:** Collingwood has the opportunity to establish a clear tourism identity and strengthen its destination communications.

**Tourism Resources and Infrastructure:** the resources and infrastructure required for Collingwood to grow and thrive as a sustainable destination must recognize that tourism is cross-sectoral.



# Where We Are Heading and Our Plan for Getting There

<b>Vision</b>	Collingwood is a socially, economically, and environmentally vibrant destination that consistently applies a sustainability lens to growth and development. It is known as a place for art, culture, food & drink, and as a regional hub for outdoor activities. Collingwood is a welcoming four-season destination that appeals to people of all ages and abilities.		
<b>2030 Goal</b>	By 2030, tourism in Collingwood will be effectively managed, sustainably developed, and responsibly marketed.		
<b>Pillars of Progress and Strategies</b>	<p><b><u>Management</u></b></p> <ul style="list-style-type: none"> <li>+ Establish a governance structure and set the operational foundation for tourism.</li> <li>+ Develop a system for monitoring and evaluating the impact of tourism in Collingwood.</li> <li>+ Communicate to stakeholders on a regular and ongoing basis.</li> </ul>	<p><b><u>Development</u></b></p> <ul style="list-style-type: none"> <li>+ Gather the information needed to make informed decisions about tourism development.</li> <li>+ Co-develop and enhance tourism product.</li> <li>+ Increase access to and enjoyment of tourism experiences.</li> </ul>	<p><b><u>Marketing</u></b></p> <ul style="list-style-type: none"> <li>+ Establish a clear tourism brand identity and destination position for Collingwood.</li> <li>+ Ensure that visitors have the information needed to make decisions across their journey.</li> <li>+ Ensure that visitor expectations are being set, met, and exceeded.</li> </ul>
<b>Initiatives</b>	<b><u>A1.1 – A3.2</u></b>	<b><u>B1.1 – B3.5</u></b>	<b><u>C1.1 – C3.2</u></b>
<b>Guiding Principles</b>	<ul style="list-style-type: none"> <li>+ Be true to Collingwood.</li> <li>+ Nurture partnership.</li> </ul>	<ul style="list-style-type: none"> <li>+ Prioritize diversity, equity, inclusion, and reconciliation.</li> <li>+ Make decisions backed by data.</li> </ul>	<ul style="list-style-type: none"> <li>+ Drive sustainable development.</li> <li>+ Stay agile.</li> </ul>
<b>Foundation</b>	Town of Collingwood Official Plan (December 2023)		Town of Collingwood Community Based Strategic Plan 2024-2028

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## About This Plan



# Background

An internal project steering committee was established at the start of the project to inform and oversee the development of the Tourism Master Plan. This committee was made up of Town staff and an external tourism leader from one of the funding organizations:

- + Summer Valentine (Director, Planning, Building, & Economic Development at Town of Collingwood)
- + Karen Cubitt (Director of Parks, Recreation and Culture at Town of Collingwood)
- + Johanna Griggs (Manager of Economic Development, Town of Collingwood)
- + Karen Clegg (Economic Development Coordinator, Town of Collingwood)
- + Bill Sullivan (CEO, Regional Tourism Organization 7: BruceGreySimcoe)

At the onset of the project a goal was set that by September 2024, the Town of Collingwood would have an evidence-based and actionable tourism master plan to guide its work over the next 3+ years. To achieve this goal, five (5) objectives were identified, which included:

1. To gather insights, input, and feedback from stakeholders in the destination,
2. To co-create a vision for tourism in the Town of Collingwood that resonates with its stakeholders,
3. To clarify and confirm the Town of Collingwood’s destination management role and responsibilities,
4. To develop strategies and related actions that are achievable by the Town of Collingwood within a 3+ year timeframe, pending appropriate resourcing, and
5. To consider alignments between the Tourism Master Plan and other relevant work, including the potential implementation of a Municipal Accommodation Tax.

To develop the Tourism Master Plan, a research and consultation plan was created with inputs from the project team and Steering Committee, resulting in 15 main questions and 30 supplementary questions to guide the research.

The research methods included conducting four types of secondary research and five types of stakeholder and community consultation.

### **Secondary research included:**

- + a background document review,
- + global trends and good practice research,
- + market research, and a jurisdictional scan.

### **Stakeholder and community consultation included:**

- + an industry and resident survey,
- + key informant interviews,
- + industry table talks, and four community focus groups, and
- + a community open house.

Additional details about each research and consultation method used for this project are outlined below.

## **Secondary Research**

**Background document review:** over 20 internal and external documents were reviewed, including plans and policies, related to a wide range of topics like arts, community planning, economic development, recreation, tourism, among others at the local and regional levels (see Appendix A). This review was used to gather key insights, information, and considerations, including alignments to provide important context, and inform research and engagement approaches.

### **Global trends and good practice**

**research:** 18 documents related to destination stewardship, systems thinking and regeneration, travel trends, and monitoring and evaluation were reviewed. This research was used to understand the context around tourism in Collingwood and to review good practices in other destinations to inform a strong foundation for sustainable tourism development.

**Market research:** relevant datasets were reviewed and analyzed, such as Environics Data from Tourism Simcoe County and Grey County, visitation data for Regional Tourism Organization 7 from the former Ontario Ministry of Tourism, Culture and Sport, and third-party traveller insights data. The research gathered visitation insights for Collingwood and neighbouring destinations, including data on source markets, and market segments. These neighbouring municipalities included in the research were the Town of the Blue Mountains, the Town of Wasaga Beach, and Clearview Township.

**Jurisdictional scan:** a review was undertaken of one competitor (Niagara-on-the-Lake) and two comparator destinations (Canmore, Alberta and Stowe, Vermont) to gather insight on the composition of each destination, their tourism products and target markets, and explored sustainable destination development and management in the context of each municipal jurisdiction.

## Stakeholder and Community Engagement

**Industry and resident survey:** a survey was distributed to industry members and residents across May 2024 to gather insights into perceptions of, and feedback on the current state and future of tourism in Collingwood. Overall, 743 responses were received from 457 residents, 79 industry members, and 137 others.

**Key informant interviews:** interviews were conducted across May 2024 with key informants identified by the internal project steering committee. This process gave an opportunity to the Mayor and all Councillors, as well as subject matter experts with a deep understanding of tourism in Collingwood, to participate. Overall, 16 interviews were conducted with 19 participants (2 interviews saw more than one individual participating).

**Industry table talks:** two industry table talks were facilitated in May 2024 with tourism business owners and operators who expressed an interest via the Industry and Resident Survey, as well as some direct invitations. The goal was to have participants from across the tourism sector, including accommodations, beverage producers, retailers, events, and tour operators. Overall, 15 industry members participated in the table talks.

**Community focus groups:** two community focus groups were facilitated in May 2024 with residents who expressed their interest via the Industry and Resident Survey. A qualifying question was used to select participants and ensure a breadth and diversity of demographics and perspectives, including both long-term residents who have lived in Collingwood for 12+ years, and new residents who have lived in Collingwood for 7 years or less. Overall, 10 residents participated in the community focus groups.

**Open house:** An open house was hosted in September 2024 to report back to the community on progress made in developing the Tourism Master Plan. Feedback was collected around the plan's draft tourism vision, guiding principles, strategies, and initiatives. In total, 62 people signed-in to the open house. Of these, 20 people self-identified as being part of the tourism industry, 42 as residents, and 4 as neither. Open house attendees were provided the choice to share their feedback via online survey, paper survey, or in-person conversation.



## Context and Connections

The Town of Collingwood has worked directly on tourism in different capacities for many years. This includes conducting direct marketing as well as contributing financially yearly to South Georgian Bay Tourism, whose mission is to encourage in-destination marketing and tourism development. Over time, the Town's approach shifted and involvement in tourism became more indirect, focusing on the annual financial contribution to South Georgian Bay Tourism.

*Note, in a news release issued on October 23, 2024, South Georgian Bay Tourism Association announced that it was ceasing operations.*

However, in 2019, the Town of Collingwood along with the Downtown Collingwood BIA, engaged FJ Galloway & Associates to develop the first Tourism Strategy and Action Plan, with financial support from Regional Tourism Organization 7, and Tourism Simcoe County. Unfortunately, the project was put on hold due to the COVID-19 pandemic, and eventually the strategy and action plan were integrated into the broader Town of Collingwood Economic Development Action Plan 2020-2025. As a result, this current project is the Town's

first dedicated tourism master plan to guide the municipality's direct work and supporting role in tourism.

At the same time, many other Town strategies, plans, reports, assessments, frameworks, and studies exist that intersect with tourism, all of which were taken into consideration in developing this tourism master plan. These include work in economic development; transportation; climate change; parks, recreation, and culture; and planning and development. Below are some of the document types reviewed through the background research for this project.

**Overall directional plans:** Tourism cannot exist without the foundational components and direction of a community, including its perspectives on sustainability, quality of life, community values, goals, priorities and overall direction around factors that impact tourism such as economic development; climate change; parks, recreation, and culture; transportation; infrastructure; diversity, equity, and inclusion; and truth and reconciliation. For this reason, alignments were reviewed and sought with documents such as the Town's Official Plan (2023), its Corporate Climate Change Action Plan (2023), and its Community-Based Strategic Plan 2020-2023 (2020). Additionally, documents

such as Regional Tourism Organization 7's Evolution – A Balanced Approach to Tourism Destination Development with Supporting Action Plan, Sustainable Tourism 2024-2029 (2024) and Tourism Simcoe County's Destination Stewardship Plan 2023-2026 (2023) were reviewed to identify the goals, priorities, and overall direction of tourism development in the wider region.

**Economic development:** Tourism is a major economic driver in many communities including the Town of Collingwood because of the direct and indirect revenues it generates, the jobs it creates, and the services and amenities it provides for the community. The Economic Development Action Plan 2020-2025 (2020) was reviewed to identify any relevant information gathered around tourism and any actions that align with tourism development. The South Georgian Bay Media Association's Attracting Film Production to Small Town Ontario (2024) was reviewed to spot linkages between tourism and growing the film industry in the region.

**Accommodations:** Having places for visitors to stay is essential to tourism. At the same time, challenges can arise from prioritizing visitor accommodations over housing for residents. Therefore, documentation around the development of the Short-Term Accommodation Licensing

Program and around the potential for implementing a Municipal Accommodation Tax was reviewed, including the Staff Report P2023-08, Consideration of a Municipal Accommodation Tax (2023), Presentation of the Municipal Accommodation Tax Draft Framework (2024), and the Staff Report #C2023-24, Licensing Short-term Accommodations (2023).

**Transportation and signage:** Getting to and around a destination is important for the development of tourism whether this is walking, hiking, cycling, taking public transit, or driving. For this reason, documents outlining how people will move around Collingwood as well as the actions needed to improve the experience were reviewed. These included the Town's Active Transportation Framework (2017), it's Cycling Plan (2019), as well as Collingwood Downtown Wayfinding Signage Report (2017), and Downtown Modernization 2020: Wayfinding Signage – Phase II Main Street Revitalization (2020). Additionally, the Town is currently developing a Master Mobility and Transportation Plan set to be completed in early 2025. Given that the Tourism Master Plan will be finalized before the Master Mobility and Transportation Plan, it will be key to ensure that the Tourism Master Plan informs the recommendations in the Master Mobility and Transportation Plan.

**Parks, recreation, and culture:** To have a viable tourism sector, tourism assets that appeal to visitors are needed. In many cases, tourism assets are also the community assets regularly used and valued by residents. These include museums and art galleries, public parks, beaches, community spaces, trails and walkways, sports and recreational facilities, among others. For this reason, documents that discussed parks, recreation, and culture were reviewed. These included the Town's Parks, Recreation & Culture Master Plan (2019), and the Arts Centre Feasibility Study (2021 and 2023). Simcoe County's A Natural Playground for Music: A Three-Year Regional Music Strategy for Barrie and Simcoe County (2018) was reviewed. The Town is currently completing a

Joint Multi-use Recreation Feasibility Assessment with the Town of The Blue Mountains. Although this feasibility assessment is not fully accounted for in the Tourism Master Plan, the importance of considering related tourism opportunities, like sports tourism growth, is understood.

**Waterfront projects:** Evident from the start, one of Collingwood's most important assets is its waterfront. There is much opportunity for the waterfront to be leveraged in tourism development initiatives. For this reason, existing projects, and plans involving the waterfront were reviewed, including the Town's Waterfront Masterplan (2016), the Terminal Point Project (2023), and the Shipyards Public Realm Plan (2024).

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## What We Know



The tourism landscape is made up of diverse sectors and actors. It can be challenging (and exciting), to define tourism, who is involved, and how is it managed. To make sure everyone reads the Tourism Master Plan from a shared foundation, below are the key components of the tourism landscape in Collingwood, while keeping in mind regional connections to other destinations like the Town of the Blue Mountains, the Town of Wasaga Beach, Clearview Township, and Simcoe County.

## Tourism and Sustainability

### Tourism in Ontario

There are many ways to understand, define, and measure the impacts of tourism. For this reason, it is important to know how tourism is understood in Ontario, including who is counted as a visitor and what types of businesses make up the tourism industry.

In Ontario, the Ministry of Tourism, Culture and Gaming (MTCG) uses the definition adopted by the United Nations World Tourism Organization (UNWTO) and the United Nations Statistical Commission, defining tourism as, “the activities of persons travelling to and staying in places outside their usual environment for no more than one consecutive year for leisure, business and other purposes.”

A visitor is defined by MTCG as, “someone who takes an overnight out-of-town trip, or who takes an out-of-town same-day trip of 40 kilometres or more away from their home.” This definition excludes those commuting to work or school, on a diplomatic mission, shopping as part of a regular activity, or going to regular appointments for doctors or religious ceremonies. It also excludes, international students who stay in Canada for 75 or more nights. Technically, it excludes permanent and seasonal residents, including weekend residents.

When it comes to the tourism industry, MTCG refers to tourism businesses, tourism front-line businesses, or tourism-related industries as, “businesses or industries that sell products and services directly to visitors.” These can include but are not limited to accommodations, food and beverage establishments; arts, entertainment and recreation-based establishments; travel services, and transportation enterprises”. It is important to recognize that many tourism businesses supply their goods and services to both visitors and non-visitors, including both permanent and seasonal residents. Therefore, related jobs and revenues cannot be exclusively linked to tourism. Additionally, each destination has a unique context that may include unconventional industries or businesses as part of tourism. For example, retail stores, grocery stores, gas stations, etc.

*NOTE: The Government of Canada has identified specific types of businesses that make up the tourism industry. Specifically, Innovation, Science and Economic Development Canada published a SME Profile 2020: Tourism Industries in Canada (2022) that identifies specific types of businesses using the North American Industry Classification Codes (NAICS) while also applying guidance from Statistics Canada’s Canadian Tourism Satellite Account Handbook (2007). The handbook provides a definition of the tourism industry as, “[a business] that would cease or continue to exist only at a significantly reduced level of activity as a direct result of an absence of tourism.” This is important to note, when looking for statistical data on the tourism industry at the national level. However, as mentioned before, not all industries or businesses that form part of tourism in a destination will fit within this definition. (See Appendix B for a list of the North American Industry Classification Codes [NAICS] for Tourism Industries)*

## **Sustainable Tourism Development in the Region**

Importantly, understandings of tourism are shifting as new challenges and perspectives emerge. One important shift noted over recent years is a focus on sustainable tourism development, which according to the UNWTO is, “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”. Different approaches and language can be used in relation to sustainable tourism development. In the region around Collingwood, for example, sustainability is a main theme of RTO7’s destination development strategy, Evolution – A Balanced Approach to Tourism, Destination Development (2023) and Clearview Township’s Strategic & Sustainable Tourism Plan (2022).

A destination stewardship approach is used by the Town of The Blue Mountains, the Municipality of Grey Highlands, Grey County, and Regional Tourism Organization 7 (i.e., The Beaver Valley project team), to develop the Beaver Valley Sustainable Tourism Strategy (2023). This strategy used the Beaver Valley project team’s understanding of destination stewardship to guide their approach to sustainable tourism development. Similarly, Tourism Simcoe County also used destination

stewardship to position its tourism role and responsibilities in One Together: Tourism Simcoe County's 2023-2026 Destination Stewardship Plan (2023). The World Travel and Tourism Council (WTTC) defines stewardship as, "an approach to destination governance that seeks to balance and meet the economic, environmental, and social/cultural needs of a destination; whilst operating within a legitimate governance model with active participation from the public and private sectors, as well as the local community."

Similarly, a regenerative approach was proposed by the Town of Wasaga Beach in its 2024-2027 Tourism Destination Management Plan Refresh (2024). In its report A Regenerative Approach to Tourism in Canada (2023), Destination Canada defines regenerative as, "[regenerating] the vitality of our places: of local people, businesses, community, and the complex ecologies that sustain them all...[regenerating] life's ability to thrive within those contexts. Just as in soil, the potential for vitality exists in any community and in any place... [regenerating] is to come together to discover and cultivate that potential through mutual care for people and place. The ongoing practice of regeneration is to tend the "soil" of the human and more-than human community together so that new levels of health and new possibilities continually arise."

Whether or not the language of destination stewardship or regeneration is used, it is vital that any efforts made towards growing tourism in the destination are sustainable; that is, they account for impacts upon the environment, society, and economy, and they work to balance the needs of locals, visitors, industry, and the environment.

## Measuring Sustainable Tourism

To understand the outcomes associated with sustainable tourism initiatives, mechanisms must be developed to monitor and evaluate the combined impact sustainable tourism initiatives have on a destination, socially, environmentally, and economically. Various frameworks and sets of indicators have been created by organizations around the world to assist destination stakeholders and tourism proponents, like the Town of Collingwood, with measuring success. In developing the Tourism Master Plan, two of these, were investigated; namely, the Statistical Framework for Measuring the Sustainability of Tourism and the Global Sustainable Tourism Council (GSTC) Destination Criteria, Version 2.0. In the strategies and initiatives identified in this plan, specifically Strategy A2, Initiative A2.1, the Town of Collingwood is committed to creating a system for monitoring and evaluating the impact of tourism in Collingwood, beginning with

the development of a monitoring and evaluation framework that has as its foundation the Global Sustainable Tourism Council's Destination Criteria (GSTC) Version 2.0.

### *Statistical Framework for Measuring the Sustainability of Tourism*

At the 55th session of the United Nations in early 2024, the United Nations World Tourism Organization presented a Statistical Framework for Measuring the Sustainability of Tourism (SF-MST), which was adopted by all 193 United Nations member states. The SF-MST is a multi-purpose conceptual framework designed to guide the measurement and presentation of data about the sustainability of tourism in relation to the environment (e.g., water resources, energy use, GHG emissions), society (e.g., visitor satisfaction, host community perceptions, decent work), and economy (e.g., visitor flows, economic distribution, investment).

The framework was developed to acknowledge the range of direct and indirect effects tourism has on a diverse spectrum of stakeholders with distinct and sometimes competing needs. Because of this complexity, there is a need to standardize and integrate approaches to tourism development, management, and measurement so that sustainability outcomes can be monitored

in consistently. This framework was designed with enough flexibility to account for the differences of scale in tourism (e.g., local, regional, national), while promoting a comparable understanding of tourism's impacts. To this end, the methods for collection and data sources can be customized to meet the needs of the organization measuring the impact of tourism. Currently, there is no accreditation scheme associated with this framework.

### *Global Sustainable Tourism Council Destination Criteria, Version 2.0*

The Global Sustainable Tourism Council (GSTC) is a membership-based not-for-profit organization developing destination related criteria to provide a common understanding of sustainable tourism which certifying bodies use to evaluate and accredit places as sustainable tourism destinations. The GSTC Destination criteria are linked to the UN's 17 Sustainable Development Goals and represent the minimum that any tourism destination should aspire to reach to be considered sustainable. The criteria are organized around four main sections, which are then broken down into sub-sections, each with its own set of indicators.



**The four main sections are:**

- + sustainable management,
- + socio-economic sustainability,
- + cultural sustainability, and
- + environmental sustainability.

The GSTC destination criteria are important because they are widely used to measure and certify sustainable tourism destinations. Due to the existence of many accreditation schemes associated with GSTC criteria, it may be advantageous for the Town of Collingwood to apply the framework to inform a measurement and monitoring program in the destination. Certification could also be an eventual goal but should not be the primary motivator. At the same time, conducting meaningful community engagement will be essential to developing any sustainable tourism monitoring framework in Collingwood. Note, the SF-MST is more current (2024) than the GSTC criteria which were last updated in December 2019, so it also provides an important reference point.

## Trends and Good Practices

### *International Travel Trends*

Trends are worth considering when deciding who to attract to a destination.

Although one cannot solely rely on trending travel patterns in marketing and product development, it is nonetheless important to explore these as potential drivers for visitation. Below are four travel trends identified for 2024 that the Town of Collingwood should keep in mind as it works to expand its visitor base; however, additional research is needed to confirm a positive return on investing into these. Note, past trends, such as cycle tourism, 2SLGBTQI+ tourism, and food tourism, including agritourism and beverage tourism, which have developed into niche parts of the tourism sector, should still be seriously considered as drivers of visitation by the Town of Collingwood moving forward.

### **Digital nomadism and home swapping:**

As return-to-the-office conversations increase, especially in Ontario, combining vacation days with work-remote privileges has become an attractive, and sometimes cost-effective, way to remain “plugged in” while exploring a new place and culture. With the increasingly high costs of travel, and accommodation making up a significant portion of travel budgets, home swapping—and home-swapping platforms, like Kindred, are helping to make digital nomadism a reality.

### **Shoulder season travel and cool-cationing:**

With 2023 being Earth’s warmest year in recorded history, the idea of travelling to a crowded destination

at the height of summer is losing its appeal. Knowing that destinations are working to, and successfully extending into their shoulder seasons, many people are choosing to visit when temperatures are more bearable, while others are actively choosing to visit more temperate destinations.

**Skip-generational, multi-generational, and private group travel:** The global ratio of living grandparents to grandchildren has reached a high point, owing to an increase in life expectancies and the fact that people are having fewer children. Since the pandemic, visitors have been looking to cultivate meaningful connections with loved ones through travel. Older, retired generations are creating memories with their grandchildren while providing their own children with the gift of childcare and allowing parents to take a break. At the same time, multi-generational and group travel is on the rise, with families and friends seeking to share unique experiences, such as renting an entire home instead of staying in separate rooms. Interestingly, the Family Travel Association's 2023 US Family Travel Survey (2023) noted that 81% of parents said they are likely to travel with their children in the next year with a planned increase in travel spending. Additionally, over 50% of parents said they were planning to travel with grandparents and children, and 20% of grandparents

mentioned they planned to take a skip-generation trip in the next 3 years.

**Astrotourism, dark sky tourism, wellness, and silent travel:** The desire for connection away from the internet is rising. More specifically, connecting with the great beyond and related phenomena, like the total solar eclipse of April 8, 2024, is pulling people away from cities to landscapes offering peace, quiet, and perspective. With the sun expected to reach its solar maximum in 2024, the aurora borealis will be on full display and available to those seeking indelible awe. Additionally, there is an interest by visitors to engage with places during the night with special night-time activities. These include moon-bathing, nocturnal creature guided tours, night-time storytelling, and night-time artistic events. Also, wellness travel is expanding to include silent experiences, ranging from quiet travel and silent retreats, walks, tours, and spaces free of noise pollution.

### *Important Perspectives and Good Practices*

It is important that good practices be considered in tourism management, particularly around approaches to increasing sustainability, equity, and wellbeing in the community for visitors and residents alike. Below are five good practices in tourism development to be kept in mind moving forward.

### **Prioritizing diversity, equity, and inclusion:**

A collective interest in moving towards the realization of diversity, equity, and inclusion (DEI) in tourism is informing the work of industry associations, organizations, and businesses in Ontario and beyond. Efforts are being taken by tourism stakeholders to build inclusive practices into their operations and develop their anti-racist and anti-oppressive capacity to collectively challenge systemic discrimination and inequities and implement needed and lasting change. Examples include the Tourism Industry Association of Ontario's "Building Inclusive Tourism" monthly webinar series, and the "Rainbow Registered Accreditation Program for 2SLGBTQI+ Friendly Spaces", managed by the Canadian Gay & Lesbian Chamber of Commerce.

### **Working through a living systems**

**lens:** Living systems theories seek to make sense of the world by explaining how living things interact with their environments and each other. Within tourism, a living systems lens encourages a paradigm shift away from thinking about destinations as machines and towards thinking of destinations as manifestations of ecosystems that are part of a larger living system: the world. This shift in perspective should be accompanied by an acknowledgement that the pursuit of sustainability in tourism will not remedy

the negative impacts of tourism from the past or in the present. This demands a systems change and the application of more integrated approaches to destination development and management towards sustainable tourism development.

### **Being realistic about regeneration:**

While there is no universally accepted definition of regeneration as it relates to tourism, regenerative approaches to tourism development are sparking important conversations around the future of tourism and encouraging efforts to activate regenerative thinking and inform how destinations are developed and managed. In 2023, Destination Canada produced a Regenerative Approach to Tourism in Canada and hosted the first International Symposium on Destination Stewardship, which served as a platform for sharing perspectives on and learning about regeneration while calling on all tourism proponents to accept their role and responsibilities as destination stewards.

### **Committing to destination**

**stewardship:** According to the Global Sustainable Tourism Council, Destination stewardship is: "a process by which local communities, governmental agencies, NGOs, and the tourism industry take a multi-stakeholder approach to maintaining the cultural, environmental, economic, and aesthetic integrity of their country, region, or town. In other words, to ensure

that the destination retains and enhances the distinctive attributes that appeal to both residents and tourists.” Importantly, destination stewardship has the potential to support sustainable tourism development while producing outcomes associated with regeneration. However, it does not have an end point. Instead, it is a cross-sectoral and collaborative pursuit requiring a breadth and diversity of stakeholders to come together. This makes monitoring and evaluating destination stewardship activities, and progress towards sustainability and regeneration, a challenging but important exercise in building understanding and awareness around where a destination is at in comparison to where it aspires to be.

**Designing for the future:** With a growing recognition and acceptance in the tourism industry that “business as usual” does not align with the long-term needs of destination stakeholders, new opportunities are presenting themselves to challenge how the business of tourism is designed. The Flourishing Business Canvas is a business modelling and storytelling tool that can empower tourism businesses and organizations. Through 17 necessary and sufficient questions, the design tool invites users to consider their organization in the contexts of the environment, society, and economy, through the perspectives of people, value, outcomes, and process. Using such tools in the tourism industry, means

that destination stakeholders can design business models that consider more risks and more opportunities, while embracing their role as stewards and contributing to the sustainability, regeneration, and ultimate flourishing of their destination.

## Factors Affecting Tourism

Because of the tourism industry’s diverse, intersectional nature, destinations around the world are rethinking how tourism can benefit their communities while simultaneously responding to shifts in visitor demands and major forces of change, from population growth and urbanization to ecosystem decline and water scarcity. As such, to flourish as a tourism destination, mindfulness of macro factors that will directly affect sustainability is required. Below are some political, economic, social, technological, legal, and environmental (PESTLE) factors affecting tourism, and the organizations working in tourism, like municipalities, in Ontario and Canada more broadly to be kept in mind when planning for tourism in Collingwood. The following secondary sources were used to identify these macro factors.

- + World Economic Forum Travel & Tourism Development Index (2024)
- + State of Destination Marketing Report (2024)
- + 2024 Summer Travel Outlook

Canadian destination in the spotlight (2024)

- + Blue Cross Travel Study (2024)
- + Ontario Cycle Tourism & Cycling Activity Report (2024)
- + Destination Canada, Fall 2023 Industry Outlook
- + Ontario Tourism Industry Health Check (2024)
- + Skift Advisory, Analysis of the Latest Economic Market Data (2024)
- + The Business Guide to Advancing Climate Justice (2024)
- + SKIFT Global Forum Key Takeaways (2023)
- + The Newcomer Perspective (2024)
- + Immigration, Refugees and Citizenship Canada report on Canadian citizenship (n.d).
- + Cycling, Energized! A Report on the State of E-Bikes in Canada (2024)
- + TIAO “Articles” (2024)
- + TIAC press releases (2024)
- + McKinsey & Company, “The state of tourism and hospitality 2024” (2024)

**Politically**, the role of organizations working in the tourism sector, including municipalities, is shifting. There is a growing need for in-house teams that

are equipped, knowledgeable, strategic, and creative with the capacity to make decisions and the skills to execute these. Recently, organizations working in the tourism sector, are increasingly offering a suite of services for visitors to plan and book their trips rather than focusing only on awareness-building activities. Connected to this shift, many organizations in the tourism sector are now collecting a municipal accommodation tax (MAT) in their destinations. In many cases, this has brought a more sustainable revenue stream to execute tourism-related initiatives beyond marketing and promotion, such as product development, industry capacity development, and tourism infrastructure development. MATs can also be used to offset negative externalities associated with tourism.

Across much of the world, there are growing calls from the public for accountability from the private sector to pursue climate justice, a concept that seeks to address the disproportionate impacts of climate change on underserved communities, including low-income groups, People of Colour, Black and Indigenous Peoples, and those with fewer resources to prepare for and recover from climate disasters. There is also a large need (globally) for comprehensive management, promotion, and protection strategies for environmental and cultural

resources in travel and tourism, alongside investment in robust infrastructure and readiness to effectively harness these resources (i.e., environmental remediation projects, monitoring ecological health, supporting the conservation and adaptation of historic places, infrastructure for accessible use of historic places, etc.)

**Economically**, the bulk of travel spending is done close to home, providing Collingwood with the opportunity to further capitalize on the potential of domestic travel. Meanwhile inter-regional trips are also on the rise across the United States and Canada and present an avenue for destinations to target international travellers. For Collingwood, this could mean travellers exploring the Great Lakes area. Despite tourism businesses slowly recovering from the pandemic, other factors in the economy have continued to challenge full recovery, such as inflation, which contributes to increased costs and smaller profit margins. Some of the larger challenges for tourism in Canada are capacity restraints, limiting growth and the ability to host visitors, including limited accommodations (anticipated shortage of 20,000 hotel rooms by 2030 due to projected demand outpacing supply in peak seasons despite new hotel builds), labour shortage (anticipated labour shortage of 12% by 2030) and air access (anticipated 30% increase in demand for seats to and within Canada from 2023-

2030). In addition to capacity restraints, increased costs have contributed to the underperformance of key sectors within the tourism industry, including hotel rentals.

**Relatedly**, 94% of Canadians feel that travel costs are rising, with 58% of these feeling that travel has become significantly more expensive. However, despite inflation and increased costs, Canadians are still eager to travel, though this sometimes means they need to be creative to find cost-efficient travel solutions or travel less than before. At the same time, organizations working in the tourism sector are increasingly interested in co-op marketing campaigns with other tourism partners to maximize limited marketing resources and reach a wider audience. Interestingly, “shop small, local, and independent” is an enduring trend in Canada and foundational to the tourism experiences sought by Canadian travellers.

**Socially**, although most Canadians plan to take their “big trip” in July (37%), August (27%), and May/June (22%), Canadians aged 60 and up are likely to plan their trip for September (44%). Additionally, 44% of Canadians said they planned to spend their “big trip with one other adult, and this increased to 52% for those making above \$150,000, and 58% for Boomers. About 32% of Canadians said they would travel with family, and this

percentage increased for Gen Z (45%), and Millennials (47%). Finally, about 23% of Canadians with an income under \$50,000 said they would be travelling solo, and this percentage increased for those aged 60 and up (41%).

Growing demand for experiential and luxury travel, combined with decreased consumer contentment with one-size-fits all experiences are changing the tourism landscape and pushing businesses and organizations to segment and better understand their audiences to develop products and experiences for specific markets and sub-segments. Although, US entries to Canada are recovering year over year, these are not yet at 2019 levels. Canadians travelling to the US have rebounded faster. More Ontarians continue to travel to the US than Americans travelling to Ontario.

Ontarians travelling within Ontario are the biggest group of visitors by market segment, both by numbers and spend, making up about 88% of Ontario's visitors and 65.9% of total visitor spending. In contrast, economic pressures are leading to an increase in budget-conscious travel, with these travellers likely to plan more intently to maximize their vacations and avoid higher costs. Interestingly, Canadian travellers find that Canadian destinations lack fitness/sports options, all-inclusive packages, nightlife options, beach/pool access, and personalized

customer service. It is also expected that Indigenous tourism will continue to drive interest and participation among domestic and international travellers. The majority of Canadians (58%), and especially Gen Z (68%), are aware of Indigenous tourism experiences and more than half of Canadians (57%) –especially Gen Z (75%), and Millennials (68%), and Gen X (55%)– are likely to take part in an Indigenous tourism experience. Interestingly, one third of international travellers (31%) are also interested in Indigenous tourism experiences.

**Technologically**, data analytics is becoming increasingly important for organizations working in the tourism sector that need this information to better understand their visitors and increase the efficacy of marketing activities and campaigns. To execute a successful marketing initiative, it is important to know the audience being targeted, as well as the marketing goal (e.g., audience being aware of the product/brand, audience booking and/or purchasing the product, etc.). However, there are challenges in realizing the potential of data including the high cost of acquiring data, lack of current data integration, and limited access to quality data. With the increase in digital marketing, new data sources are becoming available, such as numbers of views and clicks. The marketing mix of organizations working in the tourism

sector is increasingly and mostly digital via social media, content management, and e-mail marketing. More than 70% of organizations working in the tourism sector consider their marketing to be mostly digital.

**Legally**, the federal government has imposed a 2-year cap on international student permit applications, with province and territory caps weighted by population. This will result in significant decreases for Ontario, where a larger share of international students had been accepted in the past. However, the Ministry of Colleges and Universities announced that hospitality will be one of the priority program areas (or sector with high employment demand) that will be prioritized for the province's allocation of international study permit applications. The Immigration, Refugees and Citizenship Canada (IRCC) also announced in January 2024 that international post-secondary students will be able to work a maximum of 24 hours per week, instead of the permitted 40 hours during the pandemic, during term time, starting in September 2024. Additionally, asylum seekers with valid work permits in Canada have now been added to the list of designated, under-represented groups to be targeted by employers in their recruitment efforts, before applying for a Labour Market Impact Assessment (LMIA) to hire

temporary foreign workers for low-wage positions. The 2-year cap on international student permit applications is connected to the current shortage of housing throughout the country, therefore, this cap may be extended beyond the 2-years if a shortage of housing continues.

**Environmentally**, climate change will continue to fuel uncertainty as its impacts intensify and become more pronounced in the coming years. Associated with the increasing impacts of climate change, is a growing need for adaptation and resiliency efforts and attention to climate justice necessitating a shift from short-term to long-term thinking. Also, amidst calls for tourism's sustainability, organizations working in the tourism sector are increasingly being asked to drive sustainability, potentially shifting their focus from short-term gain to the long-term viability of tourism from an environmental, social, and economic perspective.

**In parallel**, Canadians are interested in ecotourism with 82% saying they are interested in this kind of travel and 26% saying that they have taken or plan to take an "ecotourism trip". Gen Z and Millennials are most interested in this type of travel and were most likely to have participated in ecotourism in the past 12 months. Also, there is growing value placed by Canadian travellers, particularly young Canadians, on travel destinations



and experiences that show environmental sustainability (e.g., low carbon footprint, renewable energy sources, EV charging stations, etc.). However, persuading travellers to pay for sustainable travel experiences is still challenging and there is increased scrutiny of environmental claims where misleading information is suspected.

## Ecosystem Actors

The local, regional, provincial, national, and international tourism landscapes are made up of diverse ecosystem actors that collectively support different aspects of the tourism sector, together forming a governing structure for tourism in their respective destinations. Roles for these different actors include marketing and promotion; destination management; education, capacity-building; development; and advocacy. To grow as a destination, familiarity with these different actors is an asset, and working to identify the best ways to work together as stewards of destination(s) as well as across jurisdictions and to reduce duplication is the preferred path forward.

### Collingwood

There are many ecosystem actors in the local tourism landscape, and the importance of finding opportunities to work together on sustainable tourism development will be key. By bringing

together the collective knowledge, skillsets, expertise, and networks the collective actors can achieve greater outcomes for tourism in the community than any individual organization working alone. Additionally, as a destination in proximity to other major Ontario destinations, the importance of working with neighbouring destination partners will be paramount for success, especially the Town of The Blue Mountains, Clearview Township, and Wasaga Beach, to collectively elevate the tourism offering in the region, and maximize the benefits realized from tourism.

For Collingwood, there are over 30 ecosystem actors directly working within tourism at the regional, provincial, national, and international levels. Through the Tourism Master Plan, there is a commitment to finding ways to collaborate with these partners to drive sustainable tourism development. (To learn more about these ecosystem actors, including their mandates, roles and responsibilities, see Appendix C). In addition to the entities, it is also important to explore collaborations with entities not directly involved in tourism, but whose work or missions align with efforts towards sustainable tourism development. For example, entities working in economic development, environmental protection, transportation, cultural heritage conservation, education, and recreation.

## **Regional Actors**

**Regional Tourism Organization 7:  
BruceGreySimcoe**

**Tourism Simcoe County**

**Georgian College**

**Saugeen Ojibway Nation**

**Town of Collingwood**

**The Blue Mountains Village  
Association**

**Town of The Blue Mountains**

**Clearview Township**

**Town of Wasaga Beach**

**Collingwood Downtown  
Business Improvement Area**

**South Georgian Bay Small  
Business Development Centre**

**Community Futures South  
Georgian Bay**

**Simcoe Muskoka Skillforce**

## **Provincial Actors**

**Destination Ontario**

**Tourism Industry Association  
of Ontario**

**Indigenous Tourism Ontario**

**Festivals and Events Ontario**

**Attractions Ontario**

**Ontario By Bike**

**Ontario Tourism Education  
Corporation**

**Ontario Restaurant Hotel &  
Motel Association**

**Travel Industry Council of Ontario**

**Waterfront Regeneration Trust**

**Resorts of Ontario**

## **National Actors**

**Destination Canada**

**Tourism Industry Association of Canada**

**Indigenous Tourism Association of Canada**

**Tourism HR Canada**

**Culinary Tourism Alliance**

**Sports Tourism Canada**

**Canadian LGBT+ Chamber of Commerce**

**Travel Media Association of Canada**

**Trans Canada Trail**

**Resorts of Ontario**

## **International Actors**

**UN Tourism**

**Global Sustainable Tourism Council**

**World Travel & Tourism Council**

At the Town, an essential component of collaboration will be developing a strong governance structure for tourism in Collingwood. This means, identifying how tourism will be managed, developed, and marketed, while working with the other ecosystem actors. This also

means knowing how best to continually engage stakeholders to gather input on tourism decisions. A key factor influencing tourism governance is the potential implementation of a Municipal Accommodation Tax (MAT), including how it might be structured if a decision is made to do so.

Since 2023, the Town has worked diligently to identify if implementing a MAT would be appropriate for Collingwood, as well as identifying the best way to implement and govern the MAT, if approved. Specifically, in April 2023, Town Council received a report titled, “P2023-08 – Municipal Accommodation Tax Model and Report for the Town of Collingwood,” which considered the implementation of a 4% MAT, including defining the parameters of the model and outlining variables used and expected revenue ranges. Following the report, stakeholder consultation was initiated on the MAT to gather insights and perspectives, and to provide preliminary options and recommendations on the possible implementation of the MAT to Council. In 2024, the Town presented a draft framework for industry input and feedback at a Mayor’s Economic Development Roundtable and hosted a subsequent Small Group Consultation with Accommodation providers and Council members appointed to the Roundtable on

Economic Development. The proposed framework outlined implementation of the MAT, including details around which types of accommodation the MAT would apply to, the rate and collection process, the eligible not-for-profit entity to receive 50%+ of the net revenue, and the entity's method of administration.

Please note, at the time of developing this Tourism Master Plan, no decision has been made by Council on the implementation of a MAT. Additionally, no Eligible Tourism Entity (ETE)

focuses solely on marketing the Town of Collingwood. There are also shifts in the tourism ecosystem, including several neighbouring and nearby municipalities now collecting a MAT and South Georgian Bay Tourism Association announcing that it was ceasing operations. However, the MAT consultations that have taken place, as well as the proposed framework outlined below, provide a solid foundation from which the Town could generate sustainable revenue for the implementation of this plan.

**MAT Component:** Application

**Recommendation:** Hotels and motels, including resorts, short-term accommodations

**Rationale:** Consistent application to all eligible accommodation providers regardless of size, operational structure, or tenure

**MAT Component:** Rate

**Recommendation:** 4%

**Rationale:** Consistent with market average (including Town of The Blue Mountains intentions) to safeguard competitiveness

**MAT Component:** Collection

**Recommendation:** Contract the Ontario Restaurant Hotel & Motel Association (ORHMA) to collect MAT on behalf of the Town

**Rationale:** Outsourcing requires fewer staff resources and leverages expertise (ORHMA currently collects for 24 municipalities)

**Rationale**  
**(continued):**

Value added services are included (i.e., analysis, reports, communication, training, software, audit, client support, support for industry, etc.)

Opportunity to re-evaluate and bring this function in-house in the future

**MAT Component:** Eligible Tourism Entity

**Recommendation:** Establish a new not-for-profit entity with the mandate to promote tourism in Collingwood

**Rationale:** Dedicated organization to promote the Town of Collingwood to visitors and support industry

Town can structure the organization to ensure proper governance and board composition through governing bylaws

Mixture of industry and skills based board composition will provide a balanced and skilled board

Would be arms-length from the Town, with a clear memorandum of understanding and key performance indicators to be achieved

**MAT Component:** Administration of Eligible Tourism Entity

**Recommendation:** Appoint an agency for administration

**Rationale:** Leverages skills, knowledge and experience within established organization

Less costly than retaining in house staff with similar expertise

Ability to bring in expertise based on organizational needs

# Markets and Marketing

## Comparator and Competitor Destinations

An important tool for understanding Collingwood's tourism markets and informing the approach to tourism management, development, and marketing is looking at how other destinations are approaching these tasks. Although the local context should always define a unique approach to tourism, there is also value in learning from the successes and challenges of others. Below are vignettes profiling two comparator and two competitor destinations. Specifically, Niagara-on-the-Lake, Ontario was selected as a competitor destination because it attracts similar markets as Collingwood including from the Greater Toronto-Hamilton Area. Stowe, Vermont and Canmore, Alberta were selected as comparator destinations due to overlap in tourism product with Collingwood and because both destinations neighbour major and mature outdoor tourism destinations including Stowe Mountain Resort and Banff National Park, respectively.

### *Niagara-on-the-Lake, Ontario*

In June 2022, Niagara -on-the-Lake (NOTL) Town Council approved a 2% Municipal Accommodation Tax that increased to 3% in October 2023. Also in 2023, the Town elected a Committee

of Council to determine how to use the Town's portion of MAT revenue. In spring 2024, the Niagara-on-the-Lake Tourism Strategy, Master Plan, & Action Plan (2024-2028) was launched, outlining how tourism in NOTL will be managed and marketed over the next four years. The strategy provides the following tourism vision: "Niagara-on-the-Lake is an extraordinary wine country destination, known for its natural beauty and unrivalled cultural experiences." Sustainability is mentioned across the document, however, no inspiring innovations in sustainable tourism development were noted during the review process. Efforts to combat seasonality are minimal.

The strategy describes two primary tourism players- Tourism Niagara-on-the-Lake (run through the Chamber of Commerce), and the Town of Niagara-on-the-Lake. On its website, NOTL Tourism states a commitment to "the development, encouragement, promotion and enhancement of a positive and diverse economic environment consistent with the special cultural, historical, agricultural, ecological and community qualities of NOTL and its environs," and a main goal being "to increase awareness of NOTL as a travel destination and to increase engagement of both local residents and visitors." Since 2022 Tourism NOTL has taken on the management of the NOTL Ambassadors, who welcome

visitors and offer recommendations on sites to see, things to do, and personal insights into how people can get the most out of their visit. The program was previously run by the Town and the Shaw Guild. To further tourism, the tourism strategy recommends that the Town sets up a new role for an “Economic Development and Tourism Director” to manage strategic infrastructure projects and collaborate with Tourism NOTL. Some roles assigned to the Town include the oversight and execution of the tourism strategy; community relations; data analysis, tourism research and business intelligence; governance and administration with the formed Tourism Strategy Committee; tourism business support and relations, as appropriate; tourism investment attraction; visitor infrastructure; and wayfinding and signage.

In addition to acting as the local Destination Marketing Organization (DMO), the NOTL Chamber of Commerce takes on data analysis, tourism research and business intelligence; marketing and promotion of the destination; product and experience development; special event hosting; tourism branding; tourism business support and relations; and visitor services, including website, guidebooks, information booths, etc. Other important actors promoting NOTL and contributing to its development include, Tourism

Niagara, and Niagara Economic Development. NOTL is a tourism destination of national importance, as such, both Destination Ontario and Destination Canada promote it in their marketing efforts.

The tourism strategy makes clear the importance of basing destination management on the wellbeing of the community and the environment, stating that “the Town’s share of MAT funding must support infrastructure that will benefit visitors, businesses and residents.” The main ways information is shared with stakeholders is via the Town website and by staff reporting back to the Tourism Committee and Council. However, the strategy also calls for an “interactive communication between the municipality, businesses, and residents” and lists Collaboration and Communication as values for the strategy. Relatedly, the strategy recommends that existing Tourism Strategy Committee stays active in an advisory role across the implementation process.

### *Stowe, Vermont*

Like Collingwood, Stowe Vermont, is the gateway to an important ski destination. Winter sports, especially downhill and cross-country skiing are important draws to the area. However, the local (DMO)’s visitor-facing website also presents visitor offerings across

the seasons, from maple sugaring in the spring to fall hikes. Outdoor tourism, sports tourism, cultural tourism, and family-friendly travel are presented via marketing materials as priorities for the destination. Important tourism assets include fall foliage, craft beverages, a charming downtown, local businesses, hiking, farmer and artisan markets, events, boutique accommodations, spas, and arts & culture. The State of Vermont also highlights Stowe on its visitor-facing website and specifically calls out the historic Long Trail, a footpath running 273 miles between the Massachusetts and Canadian borders, as a key tourism asset.

The Stowe Area Association (SAA) is the DMO for Stowe. It is a member-based organization established in 1945 with the purpose of “promoting the Stowe region as a vibrant world-class destination.” Their visitor-facing brand is called “Go Stowe.” In addition to its marketing work, the SAA offers business development and educational opportunities to its members including a Tourism Talks program that provides members with a platform to engage with each other, enabling them to “collectively navigate the challenges and capitalize on the opportunities defining the local business landscape.”

The SAA also operates the Stowe Visitor Information Center downtown and a central reservations system for nearby lodgings. It provides visitors with the

resources needed to plan a trip, including access to vacation planning experts who help guests reserve accommodations and plan their itineraries. The SAA markets themselves as connectors, stating that they are the “bridge between member businesses and the local, regional, and state stakeholders.” Prospective visitors can also request a quote to receive personalized accommodation options via email. Through this reservation system, the SAA brings in over \$3 million in bookings a year. As further evidence of the SAA’s hands-on approach, they also coordinate and distribute sales leads to their members, including specific requests for local venues, suppliers, products, and services. In addition, the SAA distributes tour operator schedules to member businesses to help them prepare for the influx of guests.

It should be noted that the landscape in Ontario is more challenging for organizations to provide reservation services given the need to hold a Travel Industry Council of Ontario licence.

The SAA clearly focusses on destination marketing and there is little information on tourism management on their website. There is no tourism strategy for Stowe available online, but members businesses seem to be the SAA’s main stakeholders, with visitors and residents taking secondary positions. Sustainability is integrated into the SAA’s mission, which



is “to market and sell the natural beauty of Stowe, its cultural and recreational opportunities and member businesses, while simultaneously enhancing the quality experience for our guests and the quality of life of the residents, in a manner which improves the economic well-being of the community and consciously promotes environmental integrity.” The three strategic pillars of the SAA are Destination Stewardship, Sustainability, and Membership Growth. To report back on their work, the industry-facing side of the SAA website includes updates (e.g. 60K annual guests to Visitor Information Center) along with a membership brochure outlining membership benefits and past successes.

The Town of Stowe is involved in select aspects of tourism management. For example, the Parks & Recreation Department collaborates with the SAA to draw tournaments to the local arena. The Town also helps attract investment by “ensuring sufficient infrastructure capacity and planning to maintain Stowe’s sense of place through design review, preservation of historic buildings, land conservation, recreation opportunities on Town-owned lands and maintaining public buildings.” In addition, the municipality held a “Special Town Meeting” on May 1, 2024 to vote on “Shall the voters rescind the Stowe Short-Term Rental Registry Ordinance adopted February 29, 2024?”, which relates to

creating a list of short-term rentals to inform future decision-making around possible regulations.

Another important organization is Stowe Vibrancy (similar to a Business Improvement Association or BIA), which hosts events in the village centre to draw people downtown. Stowe Vibrancy uses community engagement to inform its planning documents and many of the called-for improvements would benefit both residents and visitors (e.g. sidewalk infrastructure). Stowe Vibrancy understands its role in helping to create a liveable community that meets resident needs while balancing the demands of visitors.

### *Canmore, Alberta*

An hour drive from Calgary and 20-min from Banff, Canmore sits in the Bow River Valley, surrounded by the Rocky Mountains. Tourism Canmore Kananaskis (TCK) is Canmore’s official Destination Management Organization (DMO) and sets out “to increase overnight visitation, especially during the shoulder and winter seasons.” They are voluntarily funded by partner hotels and by marketing buy-ins from businesses. TCK works closely with Travel Alberta and Destination Canada to extend their marketing reach, celebrating Canmore’s connection to the mountains, small town charm (especially downtown retail, food & beverage), proximity to

wilderness, and mountain sports like hiking and biking. The main types of tourism being promoted are adventure tourism, nature/outdoor tourism, and sports tourism. Building off these, the DMO's strategic plan prioritizes future product development towards nature and sustainability-focussed tourism; meetings, incentives, conferences, and exhibitions; culture and history; culinary and shopping; sport; and health and wellness. There are two domestic target markets for the destination. This includes Authentic Experiencers from Alberta and Canada, who are visitors that are typically understated travellers looking for authentic, tangible engagement with destination they seek, and an interest in understanding the history of the places they visit. This also includes Free Spirits from the United States and overseas, who are highly social and open-minded with enthusiasm for like that extends to their outlook on travel. They indulge in high-end experiences that are shared with others, and would embrace the authentic mountain town experience and vast wilderness that Canmore Kananaskis has to offer.

The Town of Canmore also contributes to marketing the destination through a tourism webpage, set up as a "Visit" tab on the Town website. Beyond providing basic information for trip planning, the Town has also developed a Regenerative

Tourism Framework but provides no indication of how TCK and the Town are collaborating on or actioning it. Several of TCK's strategic plan initiatives focus on cross-regional collaborations related to product development, marketing, and promotion. Banff and Lake Louise Tourism, Stoney Nakoda First Nation, and Indigenous Tourism Alberta, for example are called out specifically in the strategic plan as potential partners. Travel Alberta also collaborates with TCK. The provincial website features TripAdvisor reviews and information for trip planning, including featured accommodations, getting here, climate & weather, maps & transportation, health & safety, and FAQs. Travel Alberta's "Alberta Tourism Information System" is a space to register market-ready product for provincial-level promotion and exposure, however it is unclear how this is coordinated and maintained.

Canmore Kananaskis Community Tourism Strategic Plan was completed in 2019 and sets the path for tourism development until 2029. Sustainability in the plan is considered through a "triple bottom line approach," which uses "economic, environmental and social factors to develop a more holistic accounting of sustainability. The approach is the backbone of the vision and will be the fibre that holds together a strong and unifying strategic

plan.” Seasonality is directly addressed through several initiatives including a call to animate Canmore’s downtown during weekends throughout the year; and via the development of high-quality, on-brand, authentic visitor experiences for core customers. TCK’s website has a sub-page where they outline their commitment to sustainability. TCK also encourages visitors to sign the “Pledge to the Peaks” as an awareness and commitment building resource for visitors to coexist with and respect the wildlife and environment.

TCK’s sees their stakeholders as: visitors (consumption-based and participative), businesses (production-based, collaborative/supportive, participative), residents (supportive, representative (hosts), governments (administrative/legislative, supportive /investment), NGOs (supportive, collaborative). TCK also has an industry portal within their website for industry stakeholders to learn about each other and connect with specific industry-facing resources and supports. Other important communication methods are internal meetings and presentations to Council, along with an industry newsletter. TCK’s CEO also shares updates and relevant information through LinkedIn to industry.

## Current Visitor Markets

### *RTO7: Bruce Grey Simcoe*

According to the Ontario Ministry of Tourism, Culture and Gaming (MTCG), Tourism Region 7, which includes Bruce County, Grey County, and Simcoe County, welcomed over 11.5 million domestic visitors in 2022, with 99% coming from other parts of Ontario and the rest from elsewhere in Canada. About 6% of visitors to the region were between the ages of 18-24, 24% were 25-34, 30% were 35-54, and 40% were 55+. Approximately, 65% of all visitors came for a same-day visit, versus 35% staying overnight. Importantly, of the very limited number of visitors coming to the region from elsewhere in Canada, 83% stayed overnight and 17% came for a same-day visit. It is important to recognize the impact COVID-19 had on travel, especially when considering the visitation numbers for 2022. Particularly, recognizing that the high number of domestic visitors and high occupancy rates were driven by the limited opportunities to leave the province. With the reduction of pandemic measures, these numbers cannot be counted on in the future. Additionally, it is important to note that data used from MTCG did not include visitors from the United States to the region. However, the number of visitors from the United States is considered to be relatively low based on the experience of local tourism leaders in Collingwood.

The average overnight stay for visitors was 2.6 nights, with 33% staying 2 nights, 32% staying 1 night, and 18% staying 3 nights. Also, the average visiting party size for all visitors was 1.1 with 21% travelling with children. More specifically, 45% visited as an individual, 41% visited in a group of 3 or more people, and 14% visited in a group of 2 people. Additionally, as of 2022, the occupation rate of the region was 54.7% with a projected increased recovery rate. The average daily rate was \$161.95 with \$88.58 in revenue per available room. Similarly, as of 2023, the occupation rate of short-term rentals in the region was 40% (out of 9,743 properties) with an average daily rate of \$224.69, and \$89.98 in revenue per available room. In contrast to Collingwood, visitors to the region preferred staying in private homes (38%); followed by other accommodation types, excluding hotels, motels, camping/RV facilities, and private homes (26%); other roofed commercial accommodations, excluding hotels and motels (13%); hotels (12%); camping/RV facilities (9%); and motels (2%).

Overall, the main reason visitors came to the region is for pleasure (47%) followed by spending time with friends and family (36%). Additionally, the top five (5) activities that visitors are interested in include visiting friends and family (29%), outdoor/sports activities (24%), visiting

restaurants or bars (12%), shopping (11%), and sightseeing (10%). For visitors interested in outdoor/sports activities, most wanted to visit a beach (29%), hike (16%), and ski/snowboard (10%).

In 2022, the total visitor spend for the region was approximately \$2.2 billion with about 69% coming from overnight visitors and 31% coming from same-day visitors. Not surprisingly, those visitors coming for pleasure spent the most (65%), followed by those visiting friends and relatives (20%). Most visitors came to the region in July-September, (37%), followed by April-June (26%), January-March (19%), and October-December (18%). Unsurprisingly, visitor spend coincided with the number of visitors in the region. Specifically, the region saw its highest visitor spending during Q3 July-September, followed by Q2 April-June, Q1 January-March, and Q4 October-December. Specifically, the average spend was as follows:

- + \$371 per person per overnight visit
- + \$291 per household party
- + \$190 per person
- + \$145 per person per night
- + \$90 per person per same-day visit

Note: The average spend “per person per overnight visit” means the amount a person spent for their overall overnight trip (which could include multiple nights),

while average spend “per person per night” means the average amount a person spent per night. Additionally, most spending incurred by visitors was on food & beverage (31%), including purchasing at a restaurant/bar and stores; followed by accommodations (27%); transportation (20%), including vehicle operations, vehicle rentals, public transportation, and local transportation; recreation/entertainment (14%), including recreation and culture; and retail/other (8%).

### *Collingwood*

When it comes to current visitors to Collingwood, using Environics personas, the four main visitor groups are, by order of importance, Affluent Established Families, Affluent Suburban Families, Exploring Country Couples, and Countryside Families. The importance of these visitor groups is based on having the highest number of unique visitors coming to Collingwood overall, and the above average visitation of these visitor groups to Collingwood in comparison to other visitor groups. Most are white Canadian-born visitors who speak English and are from Ottawa, the Greater Toronto and Hamilton Area, Southwestern and Southeastern Ontario, and Peterborough and the Kawarthas. They are mostly married or in common law relationships and have children living at home that range from teenagers to young adults, except Exploring Country Couples, who

have a higher percentage of visitors without children at home.

In the last three (3) years, these groups have taken about 3.5-3.6 out-of-town vacations, and spent on average \$1,718-\$1,789 on their last trip. More specifically, about 33% spent under \$500, followed by 20% spending \$1,000-\$1,999, and 15% spending \$500-\$999. Importantly, Affluent Established Families and Affluent Suburban Families both showed a higher-than-average spend of over \$3,000 per trip. In addition to this, they prefer staying at hotels, followed by friends and relatives, all-inclusive resorts, and camping. However, Countryside Families prefer cottages more than camping. At the same time, both Countryside Families and Exploring Country Couples showed a higher-than-average index of visitors preferring to stay in an RV or camper, while Affluent Established Families and Affluent Suburban Families showed a higher-than-average index for preferring a cruise ship. It is important to note that despite Collingwood not having specific places for visitor to park their RVs and campers, or to disembark from a cruise ship, there may be opportunities to collaborate with regional partners on providing these spaces while encouraging visitation to Collingwood for other interests by these visitor groups.

Overall, the top tourism activities for all four groups includes swimming, camping;

arts, crafts, sewing and knitting; cycling; playing video games; movies at the theatre/drive-in; bars and restaurants bars; and canoeing and kayaking. More specifically, the top leisure activities and local attractions for Countryside Families includes ATV/snowmobiling, water-based activities, sports and local, provincial and national parks. Exploring Country Couples also enjoy ATV/snowmobiling, and water-based activities, but also a mix of sports, parks, and festivals and events. In comparison Affluent Established Families are interested in downhill skiing, country skilling, snowshoeing, golfing, a mix of cultural heritage, and theme parks, while Affluent Suburban Families are interested in downhill skiing, power boating, jet skiing, theme parks, skating, jogging, and playing video games.

Finally, the top media channels used by all four groups includes community and daily newspapers, and radio. However, both Countryside Families and Affluent Suburban Families also use TV, while Exploring Country Couples use magazines. (See Appendix D for more details on these personas). Interestingly, this contrasts larger trends in the province around the increased focus on digital media channels, especially social media. This is in part due to their limited comfort and/or use of the internet and social media. Importantly, it reflects the need to still consider more traditional media channels, while still focusing efforts on

growing a strong digital presence for Collingwood.

## Tourism Assets

Collingwood is home to a variety of tangible and intangible tourism assets, experiences, and products that collectively form the unique tourism offering that visitors are interested in experiencing. Although not a robust list of tangible and intangible tourism assets, below are the tourism assets referenced by residents and tourism industry members in Collingwood.

- + Georgian Bay, its waterfront, and swimming access points
- + Municipal trail networks
- + Local businesses (e.g., restaurants, craft beverage producers, retail, etc.)
- + Historic downtown district
- + Local artists, including strong cultural scene
- + Welcoming and friendly atmosphere
- + Small-town feel
- + Indigenous heritage
- + Collingwood Museum
- + Community parks and spaces (e.g., Sunset Point Park, the Awen' Gathering Place, Shipyards Amphitheatre, etc.)

- + Community-focused festivals and events (e.g., Collingwood Pride, Slide Launch Days Festival, the Grill Cheese Contest, etc.)
- + Indoor/outdoor recreational spaces
- + Terminals Point (under development as a major tourism asset)

At the same time, visitors to the region do not see municipal boundaries. This means, tangible and intangible tourism assets found outside of Collingwood across the larger region also form part of the local tourism offering. Some key regional assets referenced by residents and industry members include but are not limited to:

- + Blue Mountains Village and downhill skiing
- + Pretty River Valley Provincial Park
- + Wasaga Beach Provincial Park
- + Bruce Trail
- + Village of Creemore
- + Apple Pie Trail
- + Agritourism establishments
- + Regional artists
- + Regional trail networks
- + Regional craft beverage establishments
- + Hiking trails

## Prospective Market Segments to Target

There is an opportunity to attract new visitor segments to Collingwood. Building off of the tourism trends mentioned earlier in this Plan, the following visitor types are seen as having a interest in visiting Collingwood based on the tourism offerings and/or alignment with the direction expressed by residents and industry members of the destination.

**2SLGBTQ+ travellers:** Collingwood's reputation as a welcoming destination for a diversity of peoples can be grown in the future, including 2SLGBTQ+ visitors wanting to experience the many assets offered in the destination, such as outdoor, cultural, and culinary activities. Collingwood Pride is an important event for the community, and the potential of working with community organizers to grow the event into a more visitor-facing asset is strong.

**Cyclists, bikepackers, and trail users:** Continue to be known as a destination with amazing trails and cycling adventures for visitors of all experience levels. As well as a place that welcomes e-bike users to encourage more accessible cycling experiences with multigenerational travellers, and travellers with different mobility needs. Collingwood has an extensive inventory of municipal trails and is connected with larger regional trails linking other important destinations in the region.

**Non-vehicular travellers:** Grow the reputation of Collingwood as a walkable and cyclable destination where visitors are able to arrive and move around the community without a personal vehicle by leveraging public and private transportation providers, as well as proposing itineraries using alternative modes of transportation.

**Eco-travellers:** Continue to be a gateway to diverse ecosystems and natural spaces both in Collingwood and beyond, like Georgian Bay and the Niagara Escarpment, among many others. Moreover, the values of eco-travellers are aligned with the direction expressed by residents and industry members of the destination.

**Food & beverage travellers:** Continue to grow Collingwood's reputation as a food & beverage destination with the breadth and diversity of restaurants, cafes, breweries, distilleries, as well as the various agritourism activities available in the neighbouring municipalities like Clearview Township and Town of The Blue Mountains.

**Small-town Ontario cultural visitors:** There is an opportunity to celebrate Collingwood's unique history as a community connected to Georgian Bay and the surrounding area by leveraging the many unique assets, such as the

historic downtown, local museum, arts and culture spaces, waterfront, etc., to tell the story of Collingwood's history from the first stewards of this land to the European settlers and beyond.

**Business retreaters:** Become a business retreat destination that welcomes small and medium sized groups to the destination to connect on work and with each other. Collingwood has access to a variety of accommodation types, meeting spaces, and amenities, including amenities offered by neighbouring destinations.

**Digital nomads and home swappers:** Leverage the significant number of weekend and seasonal visitors to Collingwood and encourage them to stay longer by working remotely and offering recreational activities during their stays.

**Shoulder season travellers and cool-cationers:** Increase visitation numbers during the shoulder seasons by attracting digital nomads and home swappers interested in a change of scenery during a cooler climate, hosting month-long events or activations, or offering unique packages unavailable the rest of the year. This can also support increased occupancy rates by encouraging digital nomads to stay overnight. Although Collingwood is a four-season destination, April and October are some of the lowest months for visitation.

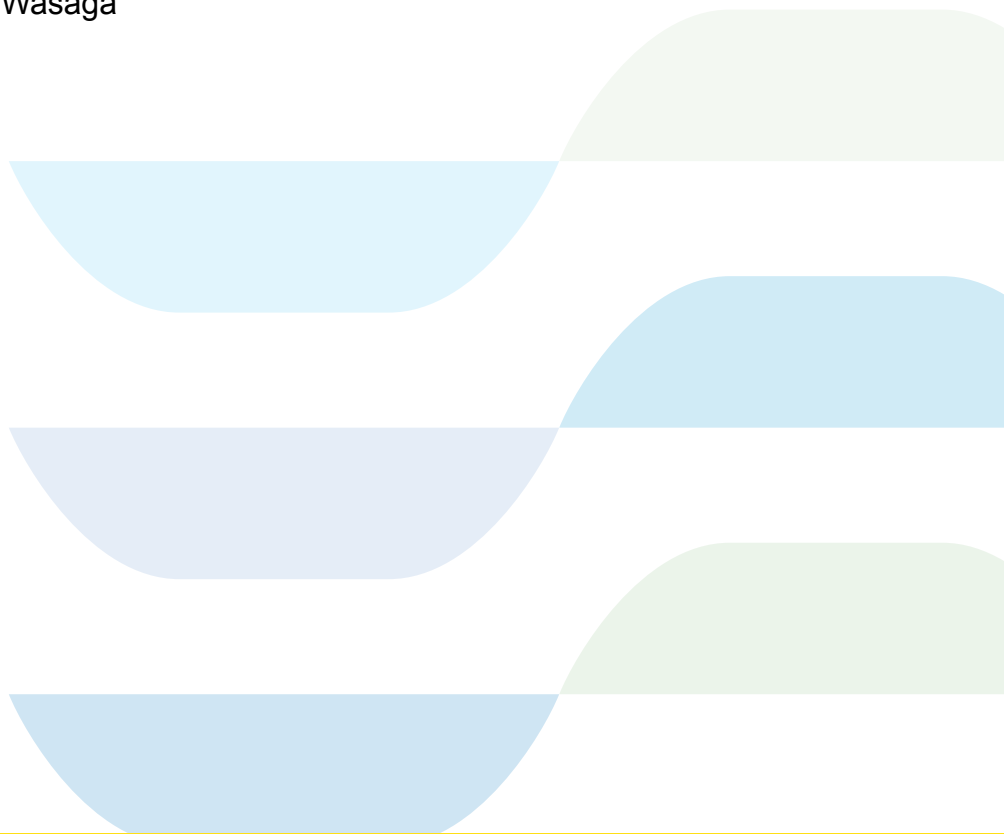


**Skip-generational, multi-generational, and private group travellers:** Grow Collingwood's reputation as a destination for all ages and abilities throughout the year. The Collingwood community aspires to further prioritize being a place where groups made up of individuals with different capabilities and interests can all find something to do.

**Dark sky travellers and silent travellers:** Grow the reputation of Collingwood as a basecamp/hub to experience the region under the dark sky through night-time activities like storytelling, culinary experiences, outdoor activities, nocturnal creature guides, etc. Importantly, there will be a need to explore these opportunities in collaboration with neighbouring municipalities like Clearview Township, the Town of The Blue Mountains, and/or the Town of Wasaga Beach.

**Boaters and cruisers travelling along Georgian Bay:** This market could benefit from the continued redevelopment of the waterfront area in collaboration with other neighbouring boating destinations like Midland, Thornbury and Meaford.

In addition, there is an opportunity to welcome visitors travelling to neighbouring destinations, especially the Town of The Blue Mountains, the Town of Wasaga Beach, and Clearview Township. Specifically, there may be an opportunity to encourage these visitors to spend more time in Collingwood by marketing the Town's overnight accommodations, along with the assets and activities that are or will be offered.



# 50

## What We Heard



Through the community-based and participatory approach underpinning the development of the Tourism Master Plan, input from residents, business owners/operators, municipal staff, organizational representatives, tourism partners, and industry leaders was received around the challenges and opportunities for tourism in Collingwood. Below are summarized the top areas stakeholders highlighted as areas to consider moving forward.

## The Environment and Climate Change

Stakeholders were clear that the Town must be proactive in its response to the impacts of climate change in the destination. They referenced how changes in weather impacts visitation, and as a result, they see a financial impact on their businesses and the overall tourism industry. An example they shared was weather cancellations due to lack of snow, heavy rain, or extreme heat. They also recognized that tourism

can have a negative impact on our environment via increased pressures on natural resources like water, as well as the increased production of waste, risks of introducing invasive species, and the physical destruction of habitats. They specifically mentioned existing challenges with the garbage in public parks and trails. Additionally, stakeholders were clear about the importance of conserving greenspaces, including wetlands, grasslands, and shorelines, while ensuring access to the natural environment.

At the same time, they saw the opportunity to use sustainable tourism development that recognizes the negative impacts of tourism to the environment (as well as the impacts to society and the economy), and implement actions that mitigate these negative impacts. They also recognized that the natural environment is a major asset for Collingwood because of all the outdoor activities residents and visitors can do here such as cycling, hiking, swimming,



*Protection of our existing greenspace, protection of our hiking trails, protection of Georgian Bay, water quality and access for tourists – **Collingwood Resident***

*Please [make] sure assets such as public spaces [and] park lands continue to be accessible to all. – **Collingwood Resident***

*We need to do more to protect and enhance our environment, surroundings, the Bay... we need to not take out beautiful Bay and the escarpment for granted. – **Collingwood Industry Member***



etc. This includes accessing the waterfront and local parks, as well as other assets in the broader region, like the provincial parks and conservation areas. However, they also underlined the importance of ensuring access to the waterfront for people with different abilities, attracting visitors who are more aware of and mitigate their impacts on

## The Sustainable Development of Tourism

Stakeholders called for a sustainable tourism development approach that recognizes and addresses the impacts of tourism on our environment, society, and economy. Although some work



*To enhance Collingwood's tourism appeal for both residents and visitors, our focus should be on preserving and enhancing waterfront access rather than constructing additional condominiums along the shoreline. – Collingwood Resident*

*Waterfront development should be a priority to create space for more public beaches, boating, waterfront dining, etc. – Collingwood Industry Member*

*Develop more public waterfront areas. – Collingwood Resident*

*I think more emphasis on [Collingwood being] nature's playground should be what [we have] to offer...the beauty of Collingwood is in the mountains and Georgian Bay...– Collingwood Industry Member*



the environment (e.g., eco-travellers, Cyclists, bike-packers, and trail users, and non-vehicular travellers), and investing in infrastructure to support sustainable tourism development like expanding and linking trails, new electric vehicle charging stations, washroom facilities, garbage disposal, and net zero buildings. Importantly, they emphasized the need to ensure the natural environment's long-term health and wellbeing for future generations and future visitation.

has been done to support sustainable tourism development, there is much to do. Interestingly, many of the areas of focus stakeholders identified went beyond tourism and connected with other disciplines, especially transportation planning, housing development, and parks and recreation. This interdisciplinary reality underlined the importance of collaborative, multidisciplinary approaches to tourism development and the need to work across municipal departments and

collaborate with other organizations to develop tourism sustainably.

One main concern from stakeholders is transportation, specifically increased vehicle traffic, limited transit options locally and regionally, including bus routes, hours of operation, and frequency, and limited transportation options from urban centres like Toronto, Hamilton, Guelph, Waterloo Region, etc. Other concerns included the limited affordability for locals to live in Collingwood; overcrowded assets like the trails and public parks; lack of pedestrian priority in the downtown and other areas; and lack of effective communications with local businesses (e.g. not warning hotels and other businesses when big events are coming to town). Additionally, they

mentioned the importance of attracting a diversity of visitors of all ages (i.e., multigenerational) to ensure the destination remains a socially inclusive place that offers activities for everyone. In alignment with this, they also mentioned the need to ensure that tourism assets are physically accessible and that information about their level of accessibility is easily available to residents and visitors.

Finally, stakeholders were clear that continued engagement with them and others is key to the successful development of sustainable tourism. They specifically mentioned the need to ensure residents are aware of the impacts and benefits of tourism to their daily lives and providing opportunities and spaces for residents to voice their concerns and call



*I dream that Main Street (Hurontario) would be pedestrian/bike ONLY from fifth to first street. – Collingwood Resident*

*...our historic district...doesn't have the...feel of a Niagara-on-the-Lake for example, {but} once you turn the historic district into a more pedestrian and cycle-friendly street, then you can activate it more. – Collingwood Industry Member*

*We need better connectivity to major transportation hubs like Union Station and Pearson airport. – Collingwood Resident*

*Affordable transportation to and from the city, makes it really hard for my customers to get here – most people in the city don't have cars and rely on public transportation to get around... – Collingwood Industry Member*

*Become a leader in sustainable tourism including the living wage for those who work here – Collingwood Resident*



out the opportunities they see to ensure tourism development in Collingwood benefits residents while also keeping in mind environmental and economic impacts. Many stakeholders, particularly residents, shared concerns of losing Collingwood's small-town feel and friendly atmosphere due to overcrowding, and lack of access for residents to services and amenities.

## The State of the Tourism Industry

Most stakeholders recognized the importance of tourism. They specifically mentioned the benefits it brings to the community such as investments into infrastructure and services at local parks and trails; supporting a variety of small local businesses including retail, restaurants, and beverage producers; creating jobs for residents; and supporting a healthy and vibrant destination for both residents and visitors all year long. At the same time, they highlighted the many challenges the tourism industry has faced, including those linked to larger interdisciplinary regional challenges like transportation, housing, workforce, climate change, etc. In particular, they mentioned the challenge of having visitor-facing businesses close early (i.e. by 6pm) and how this negatively impacts the visitor experience and the local economy. Many stakeholders connected

this challenge with the limited workforce availability in the area, in part, due to the lack of affordable housing. However, it is also important to note that early closures for some small family-run/owned businesses have been common for many years. Some businesses do not have the capacity to offer extended hours, while others are satisfied with closing early.

In parallel, stakeholders recognized the strength of the tourism industry in Collingwood and the opportunity to further capitalize on this. They mentioned the opportunity to leverage local artists in the region, but also, the need to provide supports like physical spaces/facilities to showcase their work, and the need to build awareness of this talent through collective marketing. At the same time, they mentioned that it would be beneficial to attract new businesses, professionals, and artists to benefit both residents and visitors. Finally, a key consideration highlighted was the importance of prioritizing and ensuring local businesses are central to tourism development.

## The Importance of Partnerships and Collaborations

Sustainable tourism development in Collingwood will require partnerships and collaboration. This was reinforced by several stakeholders who emphasized



*[Need] businesses on the main street to be open later than 6pm. – Collingwood Resident*

*Nightlife is the number one question: Where can we go after seeing a show at the theatre? – Collingwood Industry Member*

*Ensuring that the economic benefits of tourism are not exported out of the local economy and instead [ensuring] tourism is prioritized around small local businesses – Collingwood Resident*



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**Business owners and operators highlighted funding/investment in tourism, collaboration with community organizations, undertaking destination marketing, and permitting process support as the four (4) areas of action the Town could take to better support them in their efforts to support sustainable tourism development.**

the value of working with others including local, regional, provincial, and national partners to minimize costs and duplication and leverage existing knowledge and expertise to successfully grow and develop the destination. Stakeholders noted opportunities to work with neighbouring municipalities on mutually beneficial actions, as well as the opportunity to host industry networking events that bring together business owners/operators beyond downtown Collingwood, including the broader tourism industry and relevant organizations.

## **The Value of Tourism Assets, Activations and Experience Development**

Stakeholders recognized the distinctive tourism assets in Collingwood and specifically highlighted culinary offerings, trails, waterfront, parks, arts and entertainment community, and the unique Georgian Bay shipping history. However, they also saw an opportunity to better leverage these assets for tourism. More specifically, they mentioned the opportunity to have a space to activate

and share First Nations stories and stories around how the Georgian Bay shipping history connects to the community. They also mentioned the importance of developing evergreen experiences, meaning long-term experiences that can be offered in an ongoing fashion, despite the time of the year and/or weather, that encourage visitors to come year-round (e.g., indoor spaces offering cultural productions/exhibits, indoor culinary experiences, etc.), as well as experiences that leverage and activate the waterfront. Finally, they suggested developing experiences that encourage visitors to stay in Collingwood longer, instead of spending their time in neighbouring destinations. One example was the closure of key streets on certain days and working with businesses to plan activations and activities that keep businesses open longer.

At the same time, they emphasized the importance of creating more reasons for visitors to come to Collingwood across the year through the development of new and enhanced tourism experiences that not only attract visitors, but also benefit residents. Some examples they shared include the development of an arts and culture centre, and sports complex, as well as more water access, trails, festivals, and events. Additionally, some challenges that certain stakeholders highlighted for the development of new and enhanced tourism assets included

red tape at the Town (e.g., excessive and unclear information requirements, unclear timelines, and high cost for new small activations at a business).

## The Importance of Marketing, Promotion and Communications

Marketing, promotion, and communications was a key topic for stakeholders. Specifically, they noted that Collingwood as a destination does not have a clear identity that explains to both visitors and residents what the destination has to offer. They also mentioned that limited visitor marketing is done for Collingwood, and this creates a challenge for businesses if they decide to develop new activation and experiences as they will not receive marketing support. In contrast, others mentioned the challenge of marketing Collingwood prematurely with a lack of activations and experiences available for visitors.

Overall, stakeholders saw several opportunities for marketing, promotion, and communications. Specifically, they identified the need to develop a destination brand that differentiates Collingwood from neighbouring destinations, while also keeping a regional perspective. They identified the opportunity to strengthen communications with visitors through up-to-date trip



“ *More information and awareness of diverse local products and services that Collingwood can provide, not only focus on downtown – **Collingwood Resident***

*Better advertising. I want to know about all of the events in Collingwood every week! – **Collingwood Resident***

*Attracting more diverse visitors would be great. Not everyone is a white, straight wealthy boomer who golfs and skis. Attract LGBT visitors, etc. – **Collingwood Resident***

*I think social media could be better leveraged to bring people here...I never saw any for Collingwood when I lived in the city... – **Collingwood Industry Member*** ”

planning information including an events calendar on a destination website, destination maps, and wayfinding signage that provide visitors direction to tourism assets, especially local businesses. They also mentioned an opportunity to strengthen storytelling among the tourism industry to celebrate Collingwood’s stories and inspire visitation from new and returning visitors. Finally, they noted the need to market to an increasingly broad range of visitors.

## **The Need for Tourism Resources and Infrastructure**

Stakeholders believe that the resources and infrastructure required for Collingwood to grow and thrive as a sustainable destination must recognize that tourism is cross-sectoral. For

example, they highlighted concerns with the current state of infrastructure including the privatization of the waterfront, lack of recreational spaces for sporting tournaments and arts and culture, and a lack of boating-related infrastructure. A key challenge that stakeholders identified was the lack of investment and funding provided to tourism over the last few decades by the Town of Collingwood. However, it is important to note that tourism has only become a key sector in the local economy within the last few decades; therefore, investment into tourism is still in its infancy.

Many opportunities for Collingwood to develop as a destination were also noted, including investing in infrastructure like boating facilities, public transportation, waterfront activations, spaces for sporting and arts and culture, and a space to welcome visitors. Importantly,

stakeholders identified an opportunity to invest in developing a dedicated destination marketing organization that is staffed by subject matter experts (e.g., marketing and product development experts, etc.) to lead the sustainable development of tourism in Collingwood. Relatedly, it was suggested that a group of tourism industry representatives inform the direction taken by a new destination marketing organization. This could take the form of an industry led board of directors. Overall, residents, business owners, and operators highlighted the three (3) areas to direct investment funds to support sustainable tourism development:

- + Tourism product and experience development (incl., events, festivals, walking tours, brewery tours, apiary tours, etc.)
- + Public space beautification, and activations (e.g., facade repairs, cultural heritage conservation, public furniture, plant/tree maintenance, walkable spaces, pop-up activities, etc.)
- + Accessibility and inclusivity through tourism (e.g., affordable housing for tourism and hospitality workers, ongoing efforts for Truth and Reconciliation with Indigenous peoples, etc.)



# 59

## Where We Are Heading



# Vision for Tourism

## Strategic Alignment

The vision for tourism builds upon the mission and long-term vision for Collingwood as captured in the Town of Collingwood Community Based Strategic Plan 2024-2028:

**Mission:** Working together to provide excellent services, progressive and accountable decision-making, collaboration and advocacy.

**Vision:** Collingwood is an inclusive community that offers a healthy and active lifestyle in a beautiful waterfront setting, anchored by a responsible government, strong business network, and a historic, animated downtown.

It is also informed by the aspirations associated with the 2051 horizon in the Town of Collingwood Official Plan (December 2023):

- + Collingwood is a unique community that is a hub of year-round healthy active lifestyles. It is defined by the shoreline of Georgian Bay, with a backdrop of the nearby Niagara Escarpment - both are cherished for their natural features, historic legacy, and recreational amenities.
- + The entire community comes together in the Downtown, which is recognized as the heart of the

community, with a mix of activities, the highest quality public realm, and connections with the waterfront, to present a distinct image of the Town to residents and visitors alike.

- + The residents of Collingwood aspire to live in healthy and complete communities that are inclusive, accessible, compact and well connected for all modes of travel – and prioritizes active transportation. All residents will continue to require access to a range and mixture of housing types, community services and recreational amenities to support their well-being.
- + Collingwood wants to retain and grow its economic prosperity, while protecting its environmental and cultural assets. The local economy will continue to thrive because it is diverse, entrepreneurial, and adaptable to changing trends, just as it has been over the course of Collingwood's history.
- As Collingwood grows, the success of existing neighbourhoods and its cultural heritage resources will be strengthened, and the features that make the Town unique will remain as valued assets for future generations to enjoy.

## Vision

The Town of Collingwood’s vision for tourism is as follows:

*Collingwood is a socially, economically, and environmentally vibrant destination that consistently applies a sustainability lens to growth and development. It is known as a place for art, culture, food & drink, and as a regional hub for outdoor activities. Collingwood is a welcoming four-season destination that appeals to people of all ages and abilities.*

## Guiding Principles

Many steps will need to be taken towards realizing Collingwood’s vision for tourism. Building upon the Community Based Strategic Plan (2024-2028) values of Leadership, Integrity, Respect, Excellence, and Financial Stewardship, the following principles will help to guide the Town’s important work in tourism:

**Be true to Collingwood.** Celebrate Collingwood by leaning into the Town’s unique strengths to connect with those visitors most likely to appreciate everything the destination has to offer. Authenticity is dynamic and should include sustainable growth, positive change, and new tourism offerings that showcase everything that makes Collingwood a great place to live, work, and visit.

**Prioritize diversity, equity, inclusion, and reconciliation.** Continue to work towards building a destination based on anti-racist, anti-oppressive principles, that is welcoming, safe, diverse, inclusive, and accessible for all visitors to enjoy. This work also requires looking at tourism as a tool for truth-telling and reconciliation through meaningful engagement and relationship-building with all First Nations with a current or historic interest in the geography of the Town of Collingwood.

**Drive sustainable development.** Actions will be based on socially, economically, and environmentally sustainable outcomes for the community. This includes balancing the needs of residents and visitors in all of the Town’s tourism-related actions and continuing to engage stakeholders in tourism development decisions.

**Nurture partnership.** Use a collaborative approach to tourism development that identifies synergies and nurtures collaboration between Town Departments, along with tourism partners regionally and beyond. Continue to consider and integrate tourism goals into other strategic planning initiatives and documents.

**Make decisions backed by data.** Implement realistic and achievable actions that are data-driven and outcome-based. Data insights and key performance indicators will assist the Town with adjusting its tourism action and approaches over time based on evidence.

**Stay agile.** Be adaptable, flexible and nimble to build Collingwood's resilience to changing social, economic, and environmental contexts. This also means taking advantage of opportunities as they arise, undertaking pilot projects, and embracing possible failure as part of the learning and growth process.

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## Our Plan For Getting There



## Pillars of Progress

Progress means the movement towards a desired place to reach, in this case the Town's vision for tourism and Collingwood as a destination. The pillars of progress are the broad areas that will see all the work taking place over the next 3+ years, in pursuit of the vision and in collaboration with others. The pillars of progress are Management, Development, and Marketing.

**Management:** the planning and organization, communication and decision-making, monitoring and evaluation of tourism and tourism-related matters.

**Development:** the targeted investment of time, energy, and resources into projects that will build upon the destination and improve the visitor experience.

**Marketing:** the building of awareness amongst prospective visitors to Collingwood of everything that the destination has to offer.

## 2030 Goal

*Importantly, the pillars of progress share one common goal:*

*By 2030, tourism in Collingwood will be effectively managed, sustainably developed, and responsibly marketed.*

*Towards achieving this goal, strategies and implementation initiatives within each pillar of progress have been identified.*



# Strategies and Initiatives

What follows is an overview of the strategies within each pillar of progress, along with the related initiatives. After this is a more detailed account of each initiative.

## A. Management

### Strategy A1

**Establish a governance structure and set the operational foundation for tourism.**

To grow tourism sustainably, clarity around who is managing various aspects of tourism is needed. This ensures that the Town of Collingwood has defined roles and responsibilities related to tourism that do not overlap with those of other organizations. It also ensures that the Town has the capacity to identify whether or not a given action falls within or beyond its jurisdiction as well as how and when to collaborate with partner organizations. With a well-defined governance structure and operating model for tourism, there can be oversight for and transparency in tourism management. It also makes it possible to accurately track the implementation of the Tourism Master Plan and identify alignments between tourism development and other Town activities.

### A1 Initiatives

- + A1.1 Confirm roles, responsibilities, and decision-making processes for tourism management, development, and marketing.
- + A1.2 Develop a Tourism Master Plan (TMP) implementation tracker and process for monitoring progress.
- + A1.3 Establish a mechanism for the Town to gather input, insight, and feedback on TMP implementation matters from key stakeholders.
- + A1.4 Create and implement a financially sustainable revenue model for executing TMP strategies.
- + A1.5 Formalize strategic partnerships with tourism organizations and suppliers that can help to implement the TMP.
- + A1.6 Ensure that the tourism perspective informs relevant internal/external plans, policies, and projects.

### Strategy A2

**Develop a system for monitoring and evaluating the impact of tourism in Collingwood.**

To manage tourism responsibly, establishing a measurement system and baseline of tourism sustainability

to measure against over time allows policymakers to monitor the performance of tourism and make data-informed decisions around necessary changes. Findings from this monitoring and evaluation exercise should be shared regularly with key stakeholders, including industry, residents, partner organizations, etc. to ensure the information can be leveraged to inform strategic decision-making and actions in tourism management, marketing, and beyond.

### *A2 Initiatives*

- + A2.1 - Develop a framework for monitoring and evaluating the sustainability of tourism in Collingwood.
- + A2.2 - Monitor, evaluate, and report back on tourism sustainability on a regular basis
- + A2.3 - Identify and implement short-term actions for improving the sustainability of tourism in Collingwood.

### *Strategy A3*

#### **Communicate to stakeholders on a regular and ongoing basis.**

To ensure that information and updates about tourism are available to a wide variety of stakeholders, the Town of Collingwood will need up-to-date contact information for key stakeholders, and a communications plan tailored to their

needs. When stakeholders are aware of the tourism developments and the ways these contribute to their community, they will be better able to support tourism growth, whether that is business owners bringing on additional staff when events come to town or residents knowing where to take their visiting friends and relatives. Similarly, when stakeholders are able to share their news, information, and updates through dedicated channels, the Town of Collingwood will be better positioned to respond.

### *A3 Initiatives*

- + A3.1 - Create and maintain a contact database of tourism stakeholders within and outside of Collingwood.
- + A3.2 - Develop and implement a communications plan for sharing TMP and tourism-related updates with stakeholders.

## **B. Development**

### *Strategy B1*

#### **Gather the information needed to make informed decisions about tourism development.**

It is important for tourism development in Collingwood to be driven by data and innovative. This requires an accurate and shared understanding of what Collingwood has to offer as a destination and how this offering aligns, or not, with demands from existing and high-potential visitor target

markets. Such information and insights allow for gaps and opportunities to be identified. Tourism research undertaken by organizations across Canada and internationally is another important source of data and learning that the Town of Collingwood can benefit from while avoiding the duplication of research efforts.

### *B1 Initiatives*

- + B1.1 - Create and maintain an inventory of tangible and intangible local and regional tourism assets.
- + B1.2 - Identify gaps in market intelligence and undertake research to fill these gaps.
- + B1.3 - Stay on top of relevant tourism research, including attending select tourism conferences.

### *Strategy B2*

#### **Co-develop and enhance tourism product.**

To set Collingwood apart as a destination, high-quality place-based tourism product is essential. For the Town of Collingwood, this means working collaboratively with others to improve the destination's existing assets and develop new ones. It is important to conduct and use market research to identify new tourism business and investment opportunities, and

then develop a plan to attract investors accordingly. At the same time, it's possible that some existing community assets can be transformed into visitor-facing assets, especially events. Finally, a big part of improving tourism product means supporting tourism businesses to better meet the needs of visitors and promoting collaboration amongst industry.

### *B2 Initiatives*

- + B2.1 - Identify and assess tourism product development opportunities, including collaboration opportunities.
- + B2.2 - Drive investment into strategic tourism product opportunities.
- + B2.3 - Explore the feasibility of evolving select community events into visitor-facing events.
- + B2.4 - Collaborate with others to deliver tourism-specific training and supports to industry.
- + B2.5 - Host an annual industry networking event to foster collaboration.

### *Strategy B3*

#### **Increase access to and enjoyment of tourism experiences.**

There is an opportunity to attract more visitors to and improve their experience

of Collingwood and region by working to ensure that they are able to travel to, in, and around the region effortlessly and tourism assets are accessible to them. To start, it is important to know how accessible the current visitor experience is and to work with businesses and other key stakeholders to identify areas for improvement. Knowing how visitors get to and move around Collingwood and the broader region can help to identify ways in which to facilitate the use of multiple modes of transportation across the visitor journey. With this information and collective action, Collingwood can become a place where visitors can get to, move around comfortably while easily enjoying the destination. To further the enjoyment of Collingwood by residents and visitors alike, there is also an opportunity to leverage the people power of community organizations towards activating public spaces.

### **B3 Initiatives**

- + B3.1 - Develop and share a best practices toolkit for businesses seeking to be more accessible.
- + B3.2 - Conduct analysis of visitor movement habits and needs to facilitate multi-modal movement across Collingwood and the broader region.
- + B3.3 - Research and explore alternative transportation solutions for visitors to Collingwood.

- + B3.4 - Pilot a pedestrian street program.
- + B3.5 - Engage community organizations and business clusters to develop public space activations and beautification.

## **C. Marketing**

### **Strategy C1**

#### **Establish a clear tourism brand identity and destination position for Collingwood.**

To ensure that Collingwood stands out amongst competitor destinations and attracts high-potential target markets, there is an opportunity to reimagine Collingwood's brand identity and destination position, while also recognizing its strong connections to the South Georgian Bay Region.

### **C1 Initiatives**

- + C1.1 - Undertake a destination brand refresh process, including the development of new visual identity collateral and guidelines.
- + C1.2 - Develop and implement a values-based destination marketing plan that balances the business (i.e., economy) of tourism with the needs of the community and the environment.

## Strategy C2

### **Ensure that visitors have the information needed to make decisions across their journey.**

To plan trips that meet (and exceed) expectations, actual and prospective visitors need access to compelling, detailed, reliable, up-to-date, and easy-to-access multi-platform information across their journey. This includes the dreaming, planning, booking, experiencing, and reminiscing stages of their trip. It is strategic when sharing information with visitors to consider destination priorities related to sustainable tourism development. For example, promoting visitation in the shoulder seasons and encouraging low-carbon transportation options.

### *C2 Initiatives*

- + C2.1 - Develop a consumer-facing website that is focused on Collingwood in relation to the broader region.
- + C2.2 - Produce a four-season visitor guide and map that is available in both digital and print versions.
- + C2.3 - Pilot a Visitor Information Kiosks program while exploring the need for and feasibility of a permanent Visitor Information Centre.

- + C2.4 - Equip businesses with the information they need to provide meaningful recommendations to visitors on what to do in Collingwood.

## Strategy C3

### **Ensure that visitor expectations are being set, met, and exceeded.**

To encourage repeat visitation, referrals, and positive reputation development, Collingwood can take steps to increase the likelihood that visitor expectations are not only met but exceeded. Quality assurance along with honest and accurate marketing efforts are two parallel pieces of this process. It is important to review how key stakeholders communicate about Collingwood, but this needs to be paired with setting standards of excellence at a destination level and sharing feedback with operators around areas for improvement at the business-level.

### *C3 Initiatives*

- + C3.1 - Implement a quality assurance program that includes conducting experience assessments and providing operators with feedback.
- + C3.2 - Conduct a marketing audit and annual review.



# Initiatives

## Legend

**Pillar of Progress:**

Management, Development, or Marketing  
(A, B, or C)

**Strategy:**

Strategy statement  
(A1 to C3)

**Initiative:**

Initiative statement  
(A1.1 to C3.2)

**Priority Level:**

Very High Priority, High Priority, Medium Priority, Lower Priority

Determined in consideration of the resource demand, timeline, and perceived return on investment, including value creation and impact.

**Proposed Roles:**

Role of the Town of Collingwood and perceived role of others, specifically an Eligible Tourism Entity if MAT is implemented.

**Lead** (sole responsibility for decision-making and management, and intimately involved in implementation).

**Co-lead** (shared responsibility for decisionmaking and management, and intimately involved in implementation).

**Support** (no responsibility for decision-making or management but involved in implementation).

### **Resource Demand:**

Estimated initial budget required to implement the initiative, excluding necessary human resources.

**Very low demand** (little to no financial resources are required, i.e. >\$5,000)

**Low demand** (\$5,001-\$25,000)

**Medium demand** (\$25,001 - \$50,000)

**High demand** (\$50,001 - \$75,000)

**Very high demand** (\$75,001+)

### **Timeline:**

Approximate timing for the implementation of the initiative to begin.

**Immediate term** (triggered within the first 6-11 months)

**Short term** (triggered at 12-23 months)

**Medium term** (triggered at 24- 35 months)

**Long term** (triggered at 36+ months)

For future consideration

*\*Ongoing (to indicate that the initiative will continue beyond the initial period identified)*

### **Measure of Success:**

Qualitative indicator(s) of the success of the initiative.

### **Considerations:**

Additional information and insights to inform implementation but neither exhaustive nor the confirmed approach that will be taken to implementing the initiative.



# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A1 – Establish a governance structure and set the operational foundation for tourism.

## **Initiative:**

A1.1– Confirm roles, responsibilities, and decision-making processes for tourism management, development, and marketing.

## **Priority Level:**

Very high priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Low demand

## **Timeline:**

Immediate term

## **Measure of Success:**

- + Total clarity amongst key stakeholders around the roles, responsibilities, and processes associated with tourism management, development, and marketing.
- + Documentation that clearly articulates roles, responsibilities, and related decision-making processes.

## Considerations

For the TMP to be successfully implemented, it is imperative that Town of Collingwood (TOC) confirm the governance structure it will be using for tourism. Significant consultation around a municipal accommodation tax (MAT) has already taken place, and all signs point to the need to implement a MAT. This will require TOC to confirm or establish an “eligible tourism entity” (ETE) whose mandate includes tourism promotion, to receive and utilize a portion of the revenue generated through a MAT for promoting tourism, which can include the development of tourism products. An ETE could be an arm’s length not-for-profit destination marketing organization. This insight should be used to develop a governance

framework that clearly articulates the role and responsibilities associated with TOC and the ETE, as well as the related reporting mechanisms, e.g., Council, Board of Directors, etc. Since it will take some time for enough MAT revenue to be accrued to ensure the financial sustainability of a new ETE, it would be strategic for TOC to work with an existing ETE or establish a new ETE but have a third party, such as RTO7 or Tourism Simcoe County (TSC), deliver its services for the first couple of years. This arrangement can be formalized through a strategic partner or service agreement with the third party, as appropriate. (See Initiatives A1.3 , A1.5 and A1.6 for additional information on tourism governance)

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A1 – Establish a governance structure and set the operational foundation for tourism.

## **Initiative:**

A1.2 – Develop a TMP implementation tracker and process for monitoring progress.

## **Priority Level:**

Very high priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Very low demand

## **Timeline:**

Immediate term

## **Measure of Success:**

- + Regular and ongoing insight into the status of TMP implementation.

## Considerations

To manage the implementation of the TMP and report back to stakeholders on progress (see Initiative A3.2), TOC will need to create a simple spreadsheet at minimum, but this could evolve into a more sophisticated tool over time with sight lines for industry and other partners, that identifies what strategies are being implemented, by whom, over what period of time, processes for

monitoring progress, such as check-in meetings or quarterly reports, and level of progress made, etc. This tracker or monitoring tool, which needs to align with TOC reporting standards and protocols, should also inform the agreement and related reporting relationship between TOC and the third party and eventual ETE responsible for marketing the destination.

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A1 – Establish a governance structure and set the operational foundation for tourism.

## **Initiative:**

A1.3 – Establish a mechanism for TOC to gather input, insight, and feedback on TMP implementation matters from key stakeholders.

## **Priority Level:**

High priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Very low demand

## **Timeline:**

Immediate term

## **Measure of Success:**

- + High quality input and feedback from breadth of key tourism stakeholders.
- + Number of key stakeholders formally engaged in the supply of insight and input.

## Considerations

To ensure that TOC implementation of the TMP is benefiting from continued and valuable stakeholder insight, input, and feedback, TOC could establish a Tourism Advisory Group that reflects the breadth and diversity of stakeholders in the destination, including representatives from the public, private, and not-for-profit sectors. However, with an already high number of committees of Council, TOC may be better served to include tourism advisory support in the terms of reference for members of existing

committees or groups, such as the Economic Development Roundtable. Note, such tourism advisory support needs to be distinct from any feedback or support provided by the Board of Directors of the ETE. TOC would need to include this development and the related committee in its governance structure for tourism (see Initiative A1.1) and formalize related processes for consulting the relevant committee or group on tourism matters, including the implementation of TMP strategies being led by TOC.

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A1 – Establish a governance structure and set the operational foundation for tourism.

## **Initiative:**

A1.4 – Create and implement a financially sustainable revenue model for executing TMP strategies.

## **Priority Level:**

Very high priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Low demand

## **Timeline:**

Immediate term

## **Measure of Success:**

- + Sustainable revenue sources for implementing TMP projects and initiatives.
- + Amount (\$) of revenue generated by TOC for tourism purposes.
- + Amount (\$) of investment into TMP implementation.
- + Amount (\$) of funds leveraged from non-TOC revenue sources towards TMP-related initiatives.

## Considerations

The sustainable development of tourism in Collingwood will be highly dependent upon reliable revenue sources. A MAT can serve as a consistent and reliable stream of revenue that can be leveraged by TOC for implementing the TMP and sustaining a new or existing ETE. Conversely, without a MAT, it will be challenging for TOC to implement the TMP and pursue the sustainable tourism development in the future; that is, unless is allocated a significantly higher proportion of its annual budget to tourism. Therefore, as part of implementation planning for the TMP, it will be important for TOC to consider what strategies can be implemented with and without a MAT. As important

will be decision-making around the percentage of potential MAT revenue to share with the ETE, noting that if a MAT is approved TOC will be mandated to share no less than 50% of the net revenues from the tax, so this percentage may be used as a starting point. Note, once a new ETE is fully operational, it may be able to negotiate with TOC to increase in its share of MAT revenue. TOC and the ETE should also be seeking to generate revenue to implement the TMP from alternative sources, including but not limited to grants, such as the Tourism Growth Program as well as funding programs run by TSC, RTO7, etc.



# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A1 – Establish a governance structure and set the operational foundation for tourism.

## **Initiative:**

A1.5 – Formalize strategic partnerships with tourism organizations and suppliers that can help to implement the TMP.

## **Priority Level:**

High priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Very low demand

## **Timeline:**

Immediate term, Ongoing

## **Measure of Success:**

- + Increased access to strategic resources and supports.
- + Value (\$) of partner resources secured / leverage.

## Considerations

TOC has a breadth and diversity of actors within its tourism ecosystem, all of which have access to diverse forms of capital and resources, some of which can be leveraged for the implementation of the TMP. As part of planning the implementation of the strategies that it is identified to lead, TOC will need to identify activities that fall outside the jurisdiction of the municipality, areas where resources (including skills and expertise) are lacking and prospective implementation partners to fill these

gaps. Once identified, TOC will be able to proceed with engaging prospective partners (e.g. TSC, RTO7, Destination Ontario, neighbouring municipalities, etc.) in conversation around the creation of synergy through collaboration and the sharing of related resources. After this it will be important for the parties to formalize their commitments and relationships; for example, through partnership agreements, Memorandums of Understanding, service agreements, and other, as identified.

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A1 – Establish a governance structure and set the operational foundation for tourism.

## **Initiative:**

A1.6 – Ensure that the tourism perspective informs relevant internal/external plans, policies, and projects.

## **Priority Level:**

High priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Very low demand

## **Timeline:**

Immediate term, Ongoing

## **Measure of Success:**

- + Improved synergies and efficiencies amongst Town departments.
- + Number (#) of plan, policies, and projects that seriously consider tourism.

## Considerations

Taking an integrated approach to sustainable tourism development means considering the diversity of stakeholders in the destination while proceeding with tourism initiatives. It also means taking the tourism perspective seriously when proceeding with other municipal plans, policies, and projects. For various departments within TOC to be aligned in their efforts and working towards reducing duplication, one way for the tourism perspective to be institutionalized is to have a dedicated tourism resource at TOC, either a new hire or existing staff person, be responsible for implementing the TMP

and coordinating with the ETE. This would also allow tourism to be formally recognized as an area of focus and for consultation with them be mandated on any matters that may affect visitors to Collingwood, the tourism industry, etc. This includes having the tourism lead participate in relevant meetings, review relevant documentation, and be invited to provide insight and input into any matters that may be deemed as tourism-related. Note, since downtown Collingwood is a key tourism asset, there is potential for TOC to create a combined position for implementing the Tourism Master Plan and the Downtown Master Plan.

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A2 – Develop a system for monitoring and evaluating the impact of tourism in Collingwood.

## **Initiative:**

A2.1 – Develop a framework for monitoring and evaluating the sustainability of tourism in Collingwood.

## **Priority Level:**

Medium priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Medium demand

## **Timeline:**

Medium term

## **Measure of Success:**

- + Increased capacity to gather and act on data associated with the sustainability of tourism in Collingwood.
- + Number of data collection points being used to generate insights into the sustainability of tourism.

## Considerations

To pursue the sustainable development of tourism in Collingwood, TOC needs to be able to measure the social, economic, and environmental impacts that tourism is having on the destination over time. To do this, TOC should create a monitoring and evaluation (M&E) framework that identifies sustainable tourism outcomes for stakeholders within the private, public, and not-for-profit sectors to pursue as well as indicators to measure progress against. The framework should also identify the processes, programs, and/

or tools needed to collect data and generate tourism sustainability insights (e.g. annual resident-sentiment surveys). The M&E framework should be informed by global standards and best practices, specifically the Global Sustainable Tourism Council's Destination Criteria (GSTC) Version 2.0. It should also be informed by consultations with key stakeholders and partners around what is already being tracked, where there are gaps in information and capacities to track, and what is feasible for moving forward.

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A2 – Develop a system for monitoring and evaluating the impact of tourism in Collingwood.

## **Initiative:**

A2.2 – Monitor, evaluate, and report back on tourism sustainability on a regular basis.

## **Priority Level:**

Medium priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Medium demand

## **Timeline:**

Long term, Ongoing

## **Measure of Success:**

- + Baseline understanding of the sustainability of tourism in Collingwood.
- + Insight into how sustainable tourism is in Collingwood over time.

## Considerations

Once a framework is developed (see Initiative A2.1) and processes are put in place to monitor and evaluate the sustainability of tourism in Collingwood, TOC should work with partners to establish a tourism sustainability baseline. From here, and with continued support from partners, TOC will need to monitor and evaluate tourism performance over

time, making sure to report back to stakeholders on any progress made towards the outcomes identified in the framework. Insights garnered from process, and feedback from stakeholders, should be used to inform decision-making around necessary steps to improve sustainability (see Initiative A2.3) and course corrections to related programs and initiatives.



# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A2 – Develop a system for monitoring and evaluating the impact of tourism in Collingwood.

## **Initiative:**

A2.3 – Identify and implement short-term actions for improving the sustainability of tourism in Collingwood.

## **Priority Level:**

Lower priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Very high demand

## **Timeline:**

For future consideration

## **Measure of Success:**

- + Increased clarity around the initiatives that need to be implemented to improve the sustainability of tourism in Collingwood.

## Considerations

Once a tourism sustainability baseline has been established for Collingwood, TOC should leverage its tourism advisory support (see Initiative A1.3) and work with its partners to identify specific changes and innovations that will help the destination to become more sustainable over time. It should then prioritize these based on what is feasible to act upon in the short term and what will require a more strategic approach and/or time, energy, and resources to effect change. Short-term projects and initiatives should be included in annual budgets and corresponding work plans, while longer

term changes and innovations should be noted for future tourism planning processes. For example, if the creation of a welcoming and inclusive destination is one of the social sustainability outcomes that TOC has included in its M&E framework, and it is found in its baseline of tourism sustainability that visitors from the 2SLGBTQI+ community do not feel welcome or included in Collingwood, then this may point to a short-term action to collaborate with the CGLCC (Canada's 2SLGBTQI+ Chamber of Commerce) to become Rainbow Registered as a destination.

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A3 – Communicate to stakeholders on a regular and ongoing basis.

## **Initiative:**

A3.1 – Create and maintain a contact database of tourism stakeholders within and outside of Collingwood.

## **Priority Level:**

High Priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Very low demand

## **Timeline:**

Immediate term, Ongoing

## **Measure of Success:**

- + Increased and up-to-date awareness of the breadth and diversity of tourism stakeholders.
- + Number and type of contacts in database.

## Considerations

To communicate and collaborate with stakeholders on a regular and ongoing basis, TOC should maintain a database of tourism stakeholders (including but not limited to tourism industry members and partner organizations) and their relevant information, such as business/ organization name, description of the business/ organization, primary communication channels, the name and contact information for key individuals, etc. Considering the

time, energy, and effort associated with developing and maintain a new standalone tourism stakeholder database, TOC should leverage their existing Customer Relationship Management (CRM) tool for this purpose. If this were the case, then tourism stakeholder information can be accessed and updated more easily across departments. There may also be opportunities for TOC to provide ETE access to tourism stakeholder information in the CRM.

# Management

## **Pillar of Progress:**

A – Management

## **Strategy:**

A3 – Communicate to stakeholders on a regular and ongoing basis.

## **Initiative:**

A3.2 – Develop and implement a communications plan for sharing TMP- and tourism-related updates with stakeholders.

## **Priority Level:**

High Priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Very low demand

## **Timeline:**

Short term, Ongoing

## **Measure of Success:**

- + Clarity around the who, what, where, when, why, and how to communicate with tourism stakeholders.
- + Increased interest in and understanding of tourism matters amongst stakeholders.
- + Level of engagement with tourism stakeholders.

## Considerations

As a natural follow-up to the stakeholder engagements that informed the development of the TMP, TOC should develop and implement a communications plan to share implementation progress and other relevant updates as well as collect input and feedback from stakeholders. A fulsome two-way communications plan should outline

- + what type of information to share,
- + how the information will be shared,
- + who will receive the information,
- + and how often to share this information.

The plan should be flexible and adjusted as needed to successfully reach stakeholders. When the ETE arrangement is confirmed, for example, adjustments to the communication plan will likely be needed to account for the important relationship the ETE will have with industry.

Some examples of the types of information to share with stakeholders may include, but are not limited to, the following:

**All:** grow awareness of the TMP, how tourism-related funds are being used each year, updates on implementation progress, insights on Collingwood's tourism sustainability, how the tourism ecosystem in Collingwood and the region has changed e.g., around tourism governance)

**Residents:** Opportunities to become more aware of tourism in Collingwood, and how TMP implementation is benefitting the community etc.

**Industry:** research into sustainable tourism businesses, existing tools and supports offered by the Town and other partners, information on upcoming major events, etc.

**Partners:** updates on tourism development work in Collingwood, etc.

# Management

## **Pillar of Progress:**

B – Development

## **Strategy:**

B1 – Gather the information needed to make informed decisions about tourism development.

## **Initiative:**

B1.1 – Create and maintain an inventory of tangible and intangible local and regional tourism assets.

## **Priority Level:**

Medium Priority

## **Proposed Roles:**

Support (ETE to lead)

## **Resource Demand:**

Medium demand

## **Timeline:**

Short term, Ongoing

## **Measure of Success:**

- + Increased clarity around the local and regional asset pool.
- + Number and type of assets inventoried.
- + Number and type of initiatives leveraging inventory.

## Considerations

The ETE responsible for marketing Collingwood should lead the development and ongoing maintenance of a tangible and intangible local and regional tourism asset inventory, with support from TOC and other partners. To be efficient, the creation of the inventory should leverage any existing lists such as the contact database (see Initiative A3.1) which is likely to include most, if not all, tourism businesses and many of the Town's parks and rec facilities, etc. More specifically, the ETE should work with key stakeholders, including RTO7, TSC, the Town's Parks and

Rec and Culture Division and relevant committees, such as the Heritage Advisory Committee and Public Art Committee, the Collingwood Museum, Collingwood Public Library, among others, to develop the inventory. This inventory will be used to understand what to market (see Initiatives in C1), where investment is needed in product development (see Initiatives in B2), and how accessible existing assets are to visitors (see Initiatives in B3.1), and more broadly answer questions around what product, experiences and events are currently offered both locally and regionally.



# Management

## **Pillar of Progress:**

B – Development

## **Strategy:**

B1 – Gather the information needed to make informed decisions about tourism development.

## **Initiative:**

B1.2 – Identify gaps in market intelligence and undertake research to fill these gaps.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Medium demand

## **Timeline:**

Medium term

## **Measure of Success:**

- + Increased insight into the tourism market, including new segments to market to and their related demands.
- + Number of insights generated through research.
- + Number and types of initiatives leveraging insights.

## Considerations

To make informed product development and marketing decisions, dedicated and ongoing market research activities are needed that complement research that is already taking place in the region. TOC should continue to collect and compile existing research relevant to tourism actors and undertake new research into potential target markets that are mentioned in the TMP, including 2SLGBTQ+ travelers, dark sky and silent travellers, boaters, business retreaters, digital nomads and home swappers, neighbouring municipality target groups, shoulder season travellers and cool-cationers, skip-gen and private group travellers, etc. TOC

should consider leveraging Environics Data, Destination Canada's Data Collective, and existing data sources to conduct this research, along with coordinating additional data collection activities, as needed. There may also be opportunities to collect relevant visitation and other data from industry. Importantly, to maximize impacts of this research activity, TOC and the ETE should share research and related insights with stakeholders to inform their decision making (See Initiatives in A2) and continuously refine ideal target audiences/markets and reconfirm what travel experiences are they seeking.

# Management

## **Pillar of Progress:**

B – Development

## **Strategy:**

B1 – Gather the information needed to make informed decisions about tourism development.

## **Initiative:**

B1.3 – Stay on top of relevant tourism research, including attending select tourism conferences.

## **Priority Level:**

Medium Priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Very low demand

## **Timeline:**

Medium term, Ongoing

## **Measure of Success:**

- + Increased awareness and understanding of tourism trends and best practices.
- + Number and type of resources secured/accessed.
- + Number and type of events attended.

## Considerations

To ensure TOC and partners can make informed decisions and stay in-the-know of tourism trends and direction at a provincial, national, and international level, TOC and the ETE should stay on top of tourism research and developments, including research conducted by strategic partners like RTO7. This means attending tourism conferences like the Tourism Industry Association of Ontario's Ontario Tourism Summit, the Tourism Industry Association of Canada's Tourism Congress, IMPACT Sustainability Travel & Tourism, International

Indigenous Tourism Conference, relevant Destination Canada events, such as the past International Symposium on Destination Stewardship, etc. Additionally, TOC should seek opportunities to collaborate with tourism and hospitality post-secondary programs offered by institutions like Georgian College, Centennial College, University of Waterloo, Toronto Metropolitan University, etc. These could support research and workforce development projects that would be mutually beneficial.

# Management

## **Pillar of Progress:**

B – Development

## **Strategy:**

B2 – Co-develop and enhance tourism product.

## **Initiative:**

B2.1 – Identify and assess tourism product development opportunities, including collaboration opportunities.

## **Priority Level:**

Medium Priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Medium demand

## **Timeline:**

Medium term

## **Measure of Success:**

- + Insight into high-potential and high-impact tourism investment and collaboration opportunities.
- + Number and type of product development opportunities identified.

## Considerations

Some tourism product gaps are best filled by the public sector collaborations, others by the private sector, and others still by public-private partnership. Examples of tourism product opportunities identified through the TMP research to be further explored include participating in regional products managed by neighbouring destinations (e.g., Apple Pie Trail, etc.), new branded regional cycling/hiking routes, craft alcohol bus tour (e.g., Guelph Beer Bus), paddling rentals and experiences along the waterfront, pop-up vendor spaces, additional bike/e-bike rentals, new

events, marina services, waterfront restaurants, etc. To narrow in on opportunities, TOC should undertake research to identify a shortlist of tourism product development opportunities. This research should at a minimum consider the tourism asset inventory (see Initiative B1.1) and new market research (see Initiative B1.2) to produce basic feasibility assessments of the shortlisted opportunities and determine which ones are “best bets” along with who should lead or be involved in their execution. (i.e. public, private, PPP).

# Development

## **Pillar of Progress:**

B – Development

## **Strategy:**

B2 – Co-develop and enhance tourism product.

## **Initiative:**

B2.2 – Drive investment into strategic tourism product opportunities.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Low demand

## **Timeline:**

Long term, Ongoing

## **Measure of Success:**

- + Number of new and enhance tourism product that complement the existing offer.

## Considerations

With tourism product opportunities identified in Initiative B2.1 and basic feasibility assessments undertaken, it will be easier for TOC to sell these (soft and hard) tourism product development opportunities to potential investors, entrepreneurs, and collaborators. As well as make decisions on how TOC and partners can participate in product development activities. Based on the results of the opportunity scan, it is likely that some of the low-investment opportunities identified could be taken on directly by the ETE. Other more resource-

intensive opportunities would be best suited to private investment from entrepreneurs, businesses, and organizations, etc. These investment attraction and decision-making activities should align with the Town's Economic Development Action Plan and help inform TOC's other economic development activities. The ETE could also develop a grant program so that some MAT revenue, if implemented, is being used to drive investment back into the private sector to create more tourism product.



# Development

## **Pillar of Progress:**

B – Development

## **Strategy:**

B2 – Co-develop and enhance tourism product.

## **Initiative:**

B2.3 – Explore the feasibility of evolving select community events into visitor-facing events.

## **Priority Level:**

High Priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Very low demand

## **Timeline:**

Short term, Ongoing

## **Measure of Success:**

- + Increased clarity around whether specific community events can and should be used to attract visitors.
- + Number of existing community events that attract a significant number of visitors.

## Considerations

With strategic evolutions, some community tourism assets, especially events, have the potential to develop into visitor-facing tourism draws (e.g., Collingwood Pride, Side Launch Days Festival, Indigenous-led community events by Georgian Bay Indigenous Circle, music events, etc.). TOC's Economic Development Division should lead this strategy with collaboration from Parks, Recreation and Culture and the ETE. A first step will be determining if community/

Town event organizers are interested/ consent to expanding the audience of their event to non-residents and then working in partnership with these players if the appetite for evolution and growth is there. It is also possible that other community assets like the pending Arts and Culture Centre and/ or Multi-Use Recreation Facility could also be evolved and positioned as visitor-facing assets depending on their offerings and interest.

# Development

**Pillar of Progress:**

B – Development

**Strategy:**

B2 – Co-develop and enhance tourism product.

**Initiative:**

B2.4 – Collaborate with others to deliver tourism-specific training and supports to industry.

**Priority Level:**

High Priority

**Proposed Roles:**

Co-lead with ETE

**Resource Demand:**

Very low demand

**Timeline:**

Immediate term, Ongoing

**Measure of Success:**

- + Increased industry capacity to meet the needs of visitors.
- + Number of training opportunities/support provided to industry members.

## Considerations

To maintain an attractive and compelling tourism product, ongoing industry trainings are essential as they give business owners and operators the tools needed to meet and exceed the needs of visitors and locals, develop new products/services, communicate their offerings across platforms, etc. To avoid duplication of efforts, the ETE will share information with industry on trainings offered by tourism organizations like TIAO and RTO7, and institutions (see Initiative B1.3) as well gather information from industry on additional desired/needed trainings. TOC and the Small Business Enterprise Centre (SBEC) would focus on more tailored hands-on training and capacity building workshops.

Specific training topics, which will be identified during TMP implementation, could include such things as travel AI. For example, through the tourism product opportunity identification it could be determined that workshops on experience development and collaboration are needed. There are alignments between this initiative and the assets inventory development (Initiative B1.1) in deciding what is considered a community asset versus a visitor-facing asset. Note: Tourism businesses did not express a strong desire for trainings; however, that does not mean they are not important for Collingwood's tourism industry to stay ahead.

# Development

## **Pillar of Progress:**

B – Development

## **Strategy:**

B2 – Co-develop and enhance tourism product.

## **Initiative:**

B2.5 – Host an annual industry networking event to foster collaboration.

## **Priority Level:**

High Priority

## **Proposed Roles:**

Support (ETE to lead)

## **Resource Demand:**

Very low demand

## **Timeline:**

Immediate term

## **Measure of Success:**

- + Stronger tourism industry network.
- + Increased localization of tourism dollars.
- + Number of event attendees.

## Considerations

To nurture a tourism industry where diverse collaborations and partnerships are second nature, the ETE and partners including the TOC and SBEC should leverage any opportunity where industry are gathered to encourage networking as well as coordinate at a minimum a yearly industry meet-and-greet. For example, there is an opportunity to support a circular economy for tourism, by strengthening local food and drink supply chains, through

facilitating regional networking/product development events (e.g. chef/farmer/producer meet-and-greets) and to encourage collaborative product development. In organizing networking opportunities, it is important to invite community organizations as they could also be interested in developing tourism products (e.g., Georgian Bay Indigenous Circle, Indigenous Tourism Ontario, Collingwood Pride, and other cultural and community groups).

# Development

## **Pillar of Progress:**

B – Development

## **Strategy:**

B3 – Increase access to and enjoyment of tourism experiences.

## **Initiative:**

B3.1 – Develop and share a best practices toolkit for businesses seeking to be more accessible.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

Co-lead with ETE

## **Resource Demand:**

Medium demand

## **Timeline:**

Long term

## **Measure of Success:**

- + Increased awareness of tourism asset accessibility and means for ways to improve visitor access.
- + Number of toolkits shared.
- + Number of actions/initiatives undertaken by industry towards increasing accessibility.

## Considerations

TOC and partners, like the ETE, will benefit from a better understanding of the current level of accessibility of Collingwood's tourism assets, above and beyond Accessibility for Ontarians with Disabilities Act (AODA) requirements and basic building codes. Prospective visitors should also have easy access to this information so that a wide diversity of visitors are able to make the most of their time in Collingwood. The City of Burlington, for example, has applied a Venue Accessibility Rating system and the City of Vancouver has an Accessible

Vancouver program with many resources and tools for businesses to use. Importantly, communicating information about accessibility on a future visitor-facing website will be important to enable visitors with accessibility concerns to plan trips that will meet their specific needs effectively.

**Note:** A better understanding of current levels of accessibility can be achieved via a review or assessment of a proportional representation of tourism assets.



# Development

## **Pillar of Progress:**

B – Development

## **Strategy:**

B3 – Increase access to and enjoyment of tourism experiences.

## **Initiative:**

B3.2 – Conduct analysis of visitor movement habits and needs to facilitate multi-modal movement across Collingwood and the broader region.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Medium demand

## **Timeline:**

For future consideration

## **Measure of Success:**

- + Increased awareness amongst visitors of diverse ways to travel within Collingwood and the region.
- + Number and type of modes of transportation being used by visitors.

## Considerations

Visitors have unique transportation needs compared to residents, as they move across destinations in unique ways often at different times. This is why it's so important that the tourism perspective informs relevant internal/external plans, policies, and projects (see Initiative 1.6). To encourage multi-modal movement where transportation becomes part of the visitor experience, TOC should consider visitor behaviours and identify how visitor-transportation needs can be better met. A key question to consider is “how will visitors move from their accommodations and/or parking spots to enjoy key assets in Collingwood and the region without the use of a car (e.g., walking/hiking, cycling, public transit, etc.)”? This would improve trip planning options for visitors wanting to go to places like Blue Mountains Village, Bruce Trail, Pretty River Provincial Park, Wasaga Beach, Creemore, craft alcohol

establishments, etc. For example, is a shuttle needed to support linear hiking and cycling routes? Consider service linkage needs (e.g., bus stops at specific locations, etc.) and consider infrastructure needs (e.g., signage of businesses near trails, signage for attractions outside the downtown, and signage bringing visitors to Collingwood on major roads, etc.). As part of the analysis process, it will be important to consider existing tools, such as the Trails Map, etc. These findings and perspectives must be considered in the Town's transportation planning and wayfinding efforts. A positive outcome of this work would be for multi-modal transportation to become a sought-after experience by visitors that adds to their experience rather than being a burden. It should be the top choice for simplicity, convenience, and fun.

# Development

## **Pillar of Progress:**

B – Development

## **Strategy:**

B3 – Increase access to and enjoyment of tourism experiences.

## **Initiative:**

B3.3 – Research and explore alternative transportation solutions for visitors to Collingwood.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Medium demand

## **Timeline:**

Long term

## **Measure of Success:**

- + Insight into transportation options.
- + Number of opportunities acted upon for increasing visitation to Collingwood.

## Considerations

Establishing transportation to Collingwood beyond private vehicle will open up the destination to new tourism markets and would simultaneously benefit residents. This strategy is about TOC starting explorations into transportation options catering to visitor needs. This could include beginning conversations with Metrolinx to see the possibility of offering public transit links to Collingwood (even on a seasonal basis or event specific basis) from places like the Greater Toronto-

Hamilton Area, Waterloo Region, Guelph, etc. This could also include connecting with private bus services bringing visitors to the Blue Mountains Village to identify opportunities to stop in Collingwood or advocating for new route. For example, the Shaw Festival in Niagara-on-the Lake organizes buses from Toronto and Burlington. Similarly, the Stratford Festival organizes buses from Toronto. It is also important to connect with regional efforts, including the Simcoe County Linx system.

# Development

**Pillar of Progress:**

B – Development

**Strategy:**

B3 – Increase access to and enjoyment of tourism experiences.

**Initiative:**

B3.4 – Pilot a pedestrian street program.

**Priority Level:**

High Priority

**Proposed Roles:**

Lead

**Resource Demand:**

Low demand

**Timeline:**

Short term

**Measure of Success:**

- + Amount of foot-traffic on street during pilot.
- + Difference in sales for businesses in the downtown core.

## Considerations

Industry and residents both expressed a desire for closing a portion of Hurontario Street to vehicles on specific and/or reoccurring days/evenings with and various activations taking place on the street (e.g., live music, buskers, sporting activates, arts and crafts activities, etc.). Pedestrian days are also an opportunity to collaborate with business owners and encourage them to stay open later to better meet visitor needs and add

life to the community in the evening. Referencing the potential Hurontario road closure pilots noted in the Shipyards Public Realm Plan, TOC should lead this work in collaboration with other Town Departments, the Collingwood BIA, and community organizations interested in offering activities, as well as work on alignments with other activations, such as the Art Crawl or Christmas Market.

# Development

## **Pillar of Progress:**

B – Development

## **Strategy:**

B3 – Increase access to and enjoyment of tourism experiences.

## **Initiative:**

B3.5 – Engage community organizations and business clusters to develop public space activations and beautification.

## **Priority Level:**

High Priority

## **Proposed Roles:**

Lead

## **Resource Demand:**

Very low demand

## **Timeline:**

Short term, Ongoing

## **Measure of Success:**

- + Increased pride in place and appreciation of public spaces.
- + Number and type of activations and/or beautification initiatives implemented.

## Considerations

Through the TMP engagements, community members/organizations expressed a desire to be more involved in placemaking and community-building activities. This can also apply to clusters of businesses that share a general location, such as along the same stretch of street or alleyway. This can be achieved through coordinating participation of these groups in activations and beautifications, including managing public gardens, sports assets, community art spaces, the Terminals Point Development; however, this does not mean funding these. Examples

of community organizations include arts organizations like Blue Mountains Foundation for the Arts; environmental organizations like Nature League, Keep Collingwood Clean, and Georgian Bay Forever; recreational organizations like the Curling Club, YMCA, boating groups, etc. TOC's PRC and BIA should work together to lead this initiative. Note: Although not fully related, this strategy should also be considered while implementing the Shipyards Public Realm Plan May 2024 (e.g., mural creations, garden development/maintenance, etc.) and Collingwood Downtown Master Plan.



# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C1 – Establish a clear tourism brand identity and destination position for Collingwood.

## **Initiative:**

C1.1 – Undertake a destination brand refresh process, including the development of new visual identity collateral and guidelines.

## **Priority Level:**

Very high priority

## **Proposed Roles:**

Support (ETE to lead)

## **Resource Demand:**

Medium demand

## **Timeline:**

Immediate term

## **Measure of Success:**

- + Clarity on Collingwood’s tourism unique brand identity and value proposition, along with an understanding on how to activate these.
- + Level of brand awareness.

## Considerations

Brand identity is a foundational part of tourism marketing and stakeholders have indicated that, at present, Collingwood does not have a clear, compelling, identifiable, and distinguishable tourism brand. To build a strong brand and destination position, the ETE should lead a destination brand refresh process with support from the TOC, other strategic partners, and a third party specializing in destination identity development. This brand refresh process should include reviewing how Collingwood is currently positioned by different marketing organizations and the existing brands, such

as Experience Collingwood and Discover Collingwood. A decision will need to be made around how to approach alignments with the Town's current brand, while prioritizing the development of a compelling/non-corporate new tourism brand for the destination. The brand refresh process should be informed by feedback from residents, industry, and visitors. The refreshed brand should speak to key target markets and include the development of new brand guidelines and visual collateral that reflects Collingwood's four season offerings and its connection to the broader South Georgian Bay region.

# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C1 – Establish a clear tourism brand identity and destination position for Collingwood.

## **Initiative:**

C1.2 – Develop and implement a values-based destination marketing plan that balances the business (i.e., economy) of tourism with the needs of the community and the environment.

## **Priority Level:**

High Priority

## **Proposed Roles:**

Support (ETE to lead)

## **Resource Demand:**

Medium demand

## **Timeline:**

Immediate term, Ongoing

## **Measure of Success:**

+ Number of visitors to Collingwood.

## Considerations

With a refreshed destination brand (see Initiative C1.1) the ETE should develop a values-based marketing plan that also considers regional marketing and cross-promotional opportunities. The plan should align with sustainability aspirations (see Initiative A2.3), leverage research on existing tourism assets (see Initiative B1.1), and complement regional marketing efforts. Questions the plan will need to answer include but are not limited to:

- + what should be marketed in the destination (e.g., marketing assets that are less visited vs. assets facing overtourism, highlighting assets that are available during the week and shoulder/low-seasons, etc.),
- + who to market these specific assets to (e.g., identifying ideal visitor target groups based on the identified assets), and
- + how to market these assets (e.g., what communication channels/campaigns to use to reach target markets).

Ultimately, the marketing plan will be an important companion plan to the TMP and help to ensure its successful implementation and the sustainable development of tourism in Collingwood.

# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C2 – Ensure that visitors have the information needed to make decisions across their journey.

## **Initiative:**

C2.1 –Develop a consumer-facing website that is focused on Collingwood in relation to the broader region.

## **Priority Level:**

Very high priority

## **Proposed Roles:**

Support (ETE to lead)

## **Resource Demand:**

Low demand

## **Timeline:**

Immediate term, Ongoing

## **Measure of Success:**

- + A central, accessible information hub is available with all needed visitor-facing information from trip inspiration, to planning, and beyond.
- + Increased awareness among stakeholders about current tourism products in Collingwood, including information about accessibility, being welcoming and inclusive, etc.
- + Number of visitors to website.

## Considerations

Visitors and residents need a central place to get information on what there is to do/see/experience in Collingwood. For example, residents expressed a desire to have more information on events taking place in town and what to do with visiting friends and family, and visitors need access to information to inspire visitation as well as help trip planning. In alignment with Collingwood's refreshed tourism brand (see Initiative C1.1) and the new marketing plan (see Initiative C1.2), the ETE should develop a new consumer-facing website and an events calendar for Collingwood. In addition to inspiring imagery and information on tourism draws, the website should include information about

- + health and safety including environmental concerns like safe versus unsafe swimming areas, dangerous flora and fauna in the area, locations of cooling stations, etc.,

- + trip planning logistical information,
- + community expectations of visitors (e.g., being a respectful/responsible visitor),
- + information on accessibility including accessible assets (see Initiative B3.1).

The events calendar should also include coordination with relevant stakeholders and the development of a system to ensure it is updated on a regular basis. The ETE should also collaborate with TOC around the overarching communication plan (see Initiative A3.4) in case there are opportunities for alignment (e.g. sharing sustainability success stories with prospective visitors).

**Note:** To avoid duplicating efforts, it will be important to connect up existing events calendars and streamline processes so that business owners do not need to fill in or communicate with multiple calendar managers.

# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C2 – Ensure that visitors have the information needed to make decisions across their journey.

## **Initiative:**

C2.2 – Produce a four-season visitor guide and map that is available in both digital and print versions.

## **Priority Level:**

Medium Priority

## **Proposed Roles:**

ETE lead

## **Resource Demand:**

Low demand

## **Timeline:**

Short term

## **Measure of Success:**

- + Increased visitor access to information that inspires shoulder season visitation and helps visitors make the most of their trips (i.e. increase visitor satisfaction, increase spend).
- + Number of guides printed and distributed.
- + Traffic to and/or downloads of digital guide.

## Considerations

The ETE should develop both physical and digital visitor guides and destination maps that are aligned with the refreshed brand (see Initiative C1.1) and the marketing plan (see Initiative C1.2) as well as the consumer-facing website (see Initiative C2.1). This marketing collateral should be distributed at strategic locations in and around Collingwood (e.g., local businesses, recreational facilities, museum and cultural spaces, etc.), as well as at key events and group visits (e.g., tour groups, sports groups,

school groups, filming crew groups, etc.). If the decision is made to move forward with a bricks-and-mortar or popup visitor information kiosks (see Initiative C2.3), the guides should be available at these locations. The visitor guide should feature diverse visitor segments and activities across the year, while catering to the needs of different target markets.

**Note**, the Discover Collingwood app could be leveraged here.



# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C2 – Ensure that visitors have the information needed to make decisions across their journey.

## **Initiative:**

C2.3 – Pilot a Visitor Information Kiosks program while exploring the need for and feasibility of a permanent Visitor Information Centre.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

Support (ETE to lead)

## **Resource Demand:**

Medium demand

## **Timeline:**

Medium term

## **Measure of Success:**

- + Better understanding around value of pop up vs. permanent visitor information kiosks as tools to provide in-market.
- + Information to visitors to help them make the most of their trips (i.e. increase visitor satisfaction, increase spend).
- + Level of foot traffic/demand at pilot kiosks.

## Considerations

With support from TOC, the ETE should pilot a visitor information kiosk program at strategic locations/times (e.g. during the weekends, holidays, festivals/events, and during the week at specific businesses/venues). There are several options for how this could be rolled out including staffing the Business Development Centre (BDC) or Town Hall front desk with a highly knowledgeable resource (e.g. ETE staff person or trained and reliable ambassador) to provide in-person recommendations and other relevant

information and/or managing pop-up kiosks in a more ad-hoc fashion. The pilot program should have a monitoring and evaluations system associated with it so that it could, if successful, be evolved into a permanent solution that best meets visitor needs and is an effective use of resources. Note: There are also potential benefits to having the ETE be colocated with other business services at the BDC such as increasing synergies, avoiding duplication, and growing partnerships.

# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C2 – Ensure that visitors have the information needed to make decisions across their journey.

## **Initiative:**

C2.4 – Equip businesses with the information they need to provide meaningful recommendations to visitors on what to do in Collingwood.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

ETE lead

## **Resource Demand:**

Very low demand

## **Timeline:**

Ongoing

## **Measure of Success:**

- + Businesses know where to get information to make recommendations (e.g. hours/days of operation for different businesses) and visitors receive tailored and relevant information.
- + Amount and type of information provided to industry.
- + Level of industry awareness.

## Considerations

Tourism businesses and their staff are the face of any destination. These ambassadors have the potential to strongly influence visitor trip satisfaction. For this reason, it's important that the ETE work to ensure that tourism industry members in Collingwood (and beyond) are comfortable recommending and sharing information with visitors about the destination. Even better, is when these business owners and operators can tailor recommendations to the needs/desires of specific visitors. For example, industry should know or have easy access to the hours of operation for different businesses and understand their offerings in detail.

To equip industry with the tools and ability to do this, tactics include hosting industry meet and greet events, organizing familiarization tours to local businesses, designing an easy-to-read cheat sheet for industry with basic business/event information, providing visitor resources that businesses can hand out such as visitor guides and maps. The ETE should also consider polling industry on common questions they are asked by visitors to inform the production of the cheat sheet as well as to inform training for those staffing the tourism information kiosks (see. Initiative C2.3).

# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C3 – Ensure that visitor expectations are being set, met, and exceeded.

## **Initiative:**

C3.1 – Implement a quality assurance program that includes conducting experience assessments and providing operators with feedback.

## **Priority Level:**

Lower Priority

## **Proposed Roles:**

ETE to lead

## **Resource Demand:**

Medium demand

## **Timeline:**

Long term

## **Measure of Success:**

- + Increased awareness of the quality levels of tourism experiences in Collingwood and how these change over time, Increased operator awareness of opportunities for improvement.
- + Number of businesses assesses and/or involved in program.
- + Number of action taken by operators to improve their quality.
- + Quality of visitor experience.

## Considerations

The ETE should develop a quality assurance program to ensure that the visitor experience in Collingwood (at the business level and destination-level) is consistently of a high-quality and aligns with visitor expectations and the brand promise. To review the quality of tourism experiences in Collingwood the ETE can commission secret shopper activities at set time intervals using an assessment template that identifies tourism product evaluation criteria and then provide feedback to business operators. Additionally, to capture destination-level data and in alignment with other visitor surveys disseminated by the ETE or TOC, questions could be asked to visitors about their experience in the destination across

the year. Responses would be analyzed by the ETE on an ongoing basis to inform responsive actions. In alignment with other strategies in the TMP, survey questions can also ask about accessibility and sustainability. The ETE may choose to coordinate with preexisting quality assurance and certifications programs or commission third party support the design of a Collingwood-specific quality assurance program and/or undertake the secret shopping activities. Identified destination-wide gaps, needs, or shortcomings should inform themes for industry capacity-building workshops and destination-wide initiatives to improve the quality of the visitor experience.

# Marketing

## **Pillar of Progress:**

C – Marketing

## **Strategy:**

C3 – Ensure that visitor expectations are being set, met, and exceeded.

## **Initiative:**

C3.2 – Conduct a marketing audit and annual review.

## **Priority Level:**

Medium Priority

## **Proposed Roles:**

ETE to lead

## **Resource Demand:**

Very low demand

## **Timeline:**

Long term

## **Measure of Success:**

- + Increased understanding of how various partner organizations involved in tourism are marketing Collingwood as a destination, along with the identification of any gaps or areas for improvement, and how these change year-to-year.
- + Degree of alignment between marketing efforts and visitor experience.

## Considerations

The ETE responsible for marketing the destination should leverage insights from the quality assurance program (see Initiative C3.1), and compare these results with the messaging shared to visitors through marketing efforts across various internal and external marketing channels. The audit and review processes can help ensure that the messaging received by visitors about Collingwood sets appropriate expectations of their experience in-destination. For

example, if online marketing is heavily focused on fantastic cycling routes and trails, the audit and review process will help to ensure that the cycling routes and trails in the destination are indeed of high-quality). If gaps are identified between how assets are marketed and their state in reality, then efforts to collaboratively close these gaps should be undertaken and/or marketing messaging should be adjusted to better reflect the situation on the ground.



# Plan Overview

<b>Vision</b>	<p>Collingwood is a socially, economically, and environmentally vibrant destination that consistently applies a sustainability lens to growth and development. It is known as a place for art, culture, food &amp; drink, and as a regional hub for outdoor activities. Collingwood is a welcoming four-season destination that appeals to people of all ages and abilities.</p>		
<b>2030 Goal</b>	<p>By 2030, tourism in Collingwood will be effectively managed, sustainably developed, and responsibly marketed.</p>		
<b>Pillars of Progress and Strategies</b>	<p><b><u>Management</u></b></p> <ul style="list-style-type: none"> <li>+ Establish a governance structure and set the operational foundation for tourism.</li> <li>+ Develop a system for monitoring and evaluating the impact of tourism in Collingwood.</li> <li>+ Communicate to stakeholders on a regular and ongoing basis.</li> </ul>	<p><b><u>Development</u></b></p> <ul style="list-style-type: none"> <li>+ Gather the information needed to make informed decisions about tourism development.</li> <li>+ Co-develop and enhance tourism product.</li> <li>+ Increase access to and enjoyment of tourism experiences.</li> </ul>	<p><b><u>Marketing</u></b></p> <ul style="list-style-type: none"> <li>+ Establish a clear tourism brand identity and destination position for Collingwood.</li> <li>+ Ensure that visitors have the information needed to make decisions across their journey.</li> <li>+ Ensure that visitor expectations are being set, met, and exceeded.</li> </ul>
<b>Initiatives</b>	<p><b><u>A1.1 – A3.2</u></b></p>	<p><b><u>B1.1 – B3.5</u></b></p>	<p><b><u>C1.1 – C3.2</u></b></p>
<b>Guiding Principles</b>	<ul style="list-style-type: none"> <li>+ Be true to Collingwood.</li> <li>+ Nurture partnership.</li> </ul>	<ul style="list-style-type: none"> <li>+ Prioritize diversity, equity, inclusion, and reconciliation.</li> <li>+ Make decisions backed by data.</li> </ul>	<ul style="list-style-type: none"> <li>+ Drive sustainable development.</li> <li>+ Stay agile.</li> </ul>
<b>Foundation</b>	<p>Town of Collingwood Official Plan (December 2023)</p>		<p>Town of Collingwood Community Based Strategic Plan 2024-2028</p>

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## Appendices



# Appendix A – Document List

## Overall Directional Plans

[Town of Collingwood Official Plan \(2023\)](#)

[Corporate Climate Change Action Plan](#)

[Community-Based Strategic Plan 2020-2023. \(2020\)](#)

[Evolution – A Balanced Approach to Tourism Destination Development with Supporting Action Plan, Sustainable Tourism 2024-2029 \(2023\)](#)

[Destination Stewardship Plan 2023-2026. \(2023\)](#)

## Economic Development

[Town of Collingwood Economic Development Action Plan 2020-2025 \(2020\)](#)

[Attracting Film Production to Small Town Ontario \(2024\)](#)

## Accommodations

[Staff Report P2023-08, Consideration of a Municipal Accommodation Tax \(2023\)](#)

[Presentation of the Municipal Accommodation Tax Draft Framework \(2024\)](#)

[Staff Report #C2023-24, Licensing Short-term Accommodations \(2023\)](#)

## Transportation and Signage

[Active Transportation Framework \(2017\)](#)

[Cycling Plan \(2019\)](#)

[Collingwood Downtown Wayfinding Signage Report \(2017\)](#)

[Downtown Modernization 2020: Wayfinding Signage – Phase II Main Street Revitalization \(2020\)](#)

## Parks, Recreation, and Culture

[Parks, Recreation & Culture Master Plan \(2019\)](#)

[Collingwood Arts & Culture Centre Feasibility Study: Presentation \(2021\)](#)

[Collingwood Arts & Culture Centre Feasibility – Phase 2: Presentation to City Council \(2023\)](#)

[Collingwood Arts Centre Feasibility Study: Council Check-in \(2023\)](#)

[A Natural Playground for Music: A Three-Year Regional Music Strategy for Barrie and Simcoe County \(2018\)](#)

## Waterfront Projects

[Waterfront Masterplan \(2016\)](#)

[Collingwood Grain Terminals Revitalization \(2023\)](#)

[Collingwood Terminals Revitalization \(n.d.\)](#)

[Town of Collingwood Shipyards Public Realm Plan \(2024\)](#)

## Tourism 101 in Ontario

[SME Profile 2020: Tourism Industries in Canada \(2022\)](#)

[Canadian Tourism Satellite Account Handbook \(2007\)](#)

[Beaver Valley Sustainable Tourism Strategy \(2023\)](#)

[One Together: Tourism Simcoe County's 2023-2026 Destination Stewardship Plan \(2023\)](#)

[A Regenerative Approach to Tourism in Canada \(2023\)](#)

## Factors Affecting Tourism

[World Economic Forum Travel & Tourism Development Index \(2024\)](#)

[State of Destination Marketing Report \(2024\)](#)

[Deloitte, 2024 Summer Travel Outlook Canadian destination in the spotlight \(2024\)](#)

[Blue Cross Travel Study \(2024\)](#)

[Ontario Cycle Tourism & Cycling Activity Report 2023 \(2024\)](#)

[Destination Canada, Fall 2023 Industry Outlook \(2023\)](#)

[Ontario Tourism Industry Health Check \(2024\)](#)

[Skift Advisory, Analysis of the Latest Economic Market Data \(2024\)](#)

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Canada report on Canadian citizenship  
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tourism and hospitality 2024” (2024)

## **Comparator and Competitor Destinations**

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# Appendix B – List of NAICS Codes for Tourism Industries

## NAICs Description

### *Air Transportation*

- 4811** Scheduled Air Transport
- 4812** Non-Scheduled Air Transport

### *Rail Transportation*

- 4821** Rail Transportation

### *Water Transportation*

- 4831** Deep sea, coastal and Great Lakes Water Transportation
- 4832** Inland Water Transportation

### *Bus Transportation*

- 4851** Urban Transit Systems
- 4852** Interurban and rural bus transportation
- 4854** School and employee bus transportation
- 4855** Charter bus industry
- 4859** Other transit and group passenger transportation

### *Scenic and Sightseeing Transportation*

- 4871** Scenic and sightseeing transportation, land
- 4872** Scenic and sightseeing transportation, water
- 4879** Scenic and sightseeing transportation, other

### *Taxicabs*

- 4853** Taxi and Limousine Service

### *Travel Services*

- 5615** Travel Arrangement and Reservation Services

### *Recreation and Entertainment*

- 51213** Motion picture and video exhibition
- 7111** Performing Arts Companies
- 7112** Spectator sports
- 7115** Independent artists, writers and performers
- 7121** Heritage institutions
- 7131** Amusement parks and arcades
- 7132** Gambling Industries
- 7139** Other amusement and recreation industries

## *Hotel and Motel*

**7211** Traveller accommodation

## *Camping*

**721211** RV (recreational vehicle) parks  
and campgrounds

## *Other Accommodations*

**721212** Hunting and fishing camps

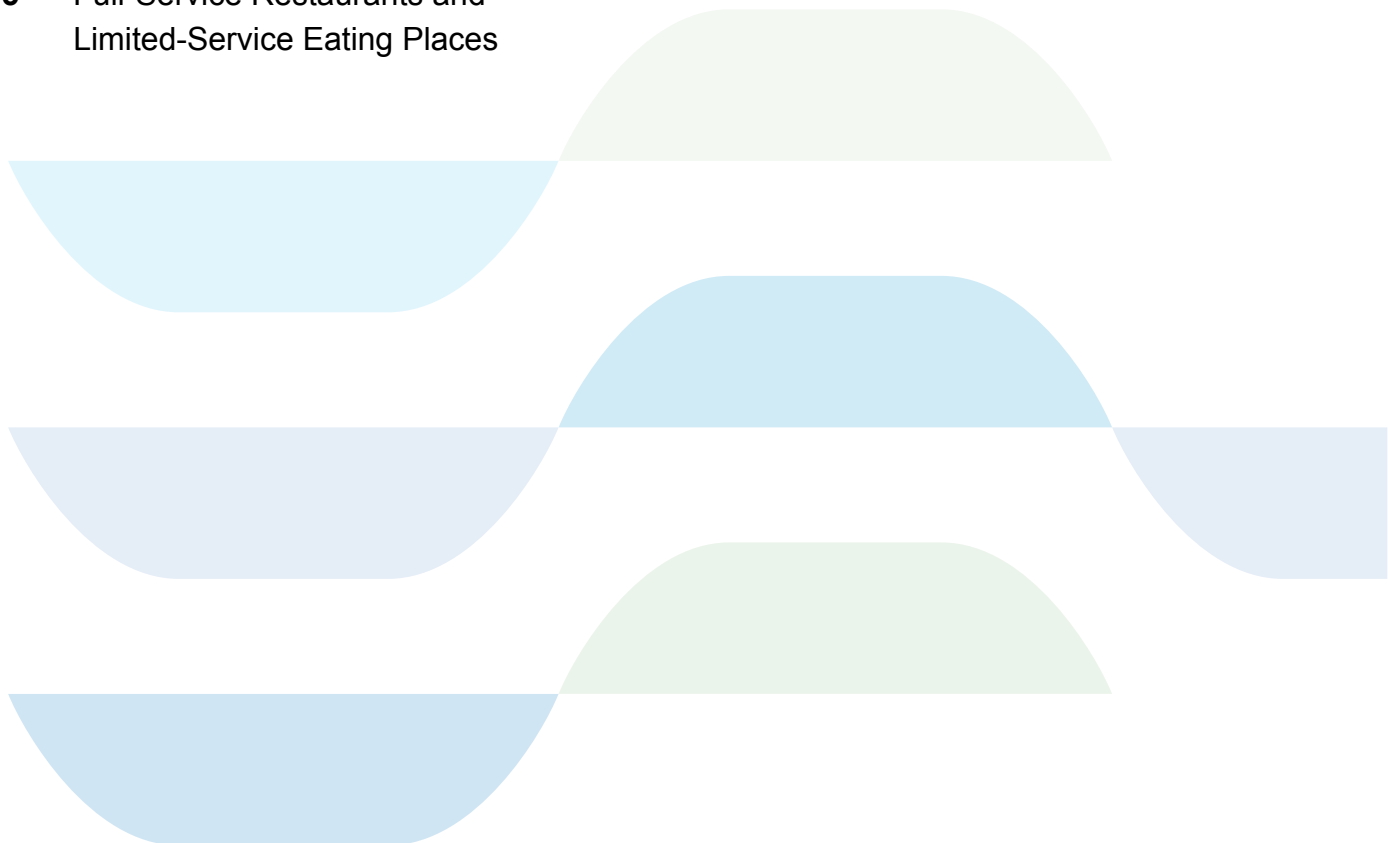
**721213** Recreational (except hunting and  
fishing) and vacation camps

**721198** All other traveller accommodation

## *Food and Beverage Services*

**7224** Drinking Places  
(Alcoholic Beverages)

**7225** Full-Service Restaurants and  
Limited-Service Eating Places



# Appendix C – Ecosystem Actors

## Regional Level

### **Regional Tourism Organization**

**7: BruceGreySimcoe (RTO7):** It is one of Ontario’s 15 regional tourism organizations in the province that were created through the Tourism Competitiveness Study completed by the province in 2009. It is an independent, industry-led, not-for-profit corporation funded by the Ontario Ministry of Tourism, Culture and Gaming. Its roles and responsibilities includes providing leadership and coordination to support competitive and sustainable tourism regions, including supporting the tourism industry and attracting tourism visitors to the counties of Bruce, Grey, and Simcoe. RTO7 also provides visitor-facing supports and resources through its consumer [website](#), and industry-facing supports through its industry [website](#).

**Tourism Simcoe County (TSC):** It is the destination marketing and management organization for Simcoe County, and forms part of the upper-tier municipality of Simcoe County from where it receives its funding. Its role and responsibilities include regional leadership and representation, supporting the tourism industry in developing partnerships and collaboration, product development and

innovation, marketing and promotion, and research and learning. It also provides visitor-facing and industry supports and resources through its website.

### **South Georgian Bay Small Enterprise Centre (SBEC):**

It is part of a network of other Small Business Enterprise Centres operating in Ontario in partnership with the Ministry of Economic Development and Innovation. It provides support to start-up and existing small business enterprises, including tourism enterprises, during their development, retention, and operation. They provide entrepreneurs, including tourism entrepreneurs, with easy access to business consulting services and information covering management, marketing, technology, and financing. It is administered by the Town of Collingwood with supports from multiple municipalities including the Town of Collingwood, Clearview Township, the Town of The Blue Mountains, and the Town of Wasaga Beach. To learn more, visit their [website](#).

**Georgian College (GC):** It is a post-secondary institution that offers a variety of programs at its various campuses including Hospitality, Tourism and Recreation at its Barrie Campus. Specifically at its South Georgian Bay Campus in Collingwood, it hosts select courses from different programs including health, wellness and sciences; human services; hospitality, tourism



and recreation; continuing education; preparatory programs; and motorcycle training. To learn more, visit their [website](#).

**Saugeen Ojibway Nation (SON):** It is made up of Saugeen Anishnaabek at Chippewas of Nawash Unceded First Nation and Saugeen First Nation. Saugeen Anishnaabek have been living in their home on and near the Saugeen (Bruce) Peninsula since time immemorial. Through their treaties with the Crown, they have agreed to share part of their land with people who have come from all around the world. In particular, their traditional territories span roughly from Goderich to the Nottawasaga River and from Arthur to Tobermory, meaning it includes the land we know today as Collingwood Collectively, Chippewas of Nawash Unceded First Nation and Saugeen First Nation have formed the Saugeen Ojibway Nation (SON) Environmental Office which provides infrastructure and expertise for matters that affect the rights and interests of SON and support the Joint Chiefs and Councils of SON in asserting jurisdiction across SON Territory. To learn more, visit SON [website](#), Saugeen First Nation [website](#), and Chippewas of Nawash Unceded First Nation [website](#).

**The Blue Mountain Village Association (BMVA):** It is a not-for-profit, membership-based association incorporated by special

legislation Bill Pr14, Blue Mountain Village Association Act, 1999 following the development of Blue Mountain Village within the Town of The Blue Mountains, Ontario. Its roles and responsibilities include destination management, marketing, and membership services. It supports the village by providing public visitor amenities and programming, destination marketing, community relation, and more. Visitor amenities include public walkways and seating, docks and trails, a water play fountain, a playground, gardens, the Mill Pond, visitor information services and wayfinding signage, public restrooms, and more. Visitor programming includes award-winning events and animation, seasonal decorations, children's activities, visitor planning, and information services, safety and security, maintenance, waste collection and recycling, and more. To learn more, visit their [website](#).

**Town of The Blue Mountains (TBM):** It is a neighbouring municipality of the Town of Collingwood, which is home to a variety of tourism assets including rural landscapes, provincial parks and nature reserves, conservation areas, the Bruce Trail, agritourism businesses/experiences, the Village of Thornbury and Clarksburg, and the Blue Mountain Village, a major four-season destination in Ontario. To learn more, visit their [website](#).

**Clearview Township (CT)**: It is a neighbouring municipality of the Town of Collingwood, which is home to a variety of tourism assets including rural landscapes, agritourism businesses/experiences, and the Village of Creemore.

**Town of Wasaga Beach (TWB)**: It is a neighbouring municipality of the Town of Collingwood, which is home to a variety of tourism assets including provincial parks, and the world's longest freshwater beach. To learn more, visit their [website](#).

**Collingwood Downtown Business Improvement Area (CDBIA)**: It is a private-public partnership entity that exists under the Ontario Municipal Act and the Town of Collingwood's bylaw. It is funded by a levy placed on the property taxes of each owner within the designated boundaries. Its purpose is to oversee the improvement, beautification and maintenance of municipally owned lands, buildings, and structure in the area beyond that provided at the expense of the municipality generally, and to promote the area as a business or shopping area. It also provides visitor-facing and industry supports and resources through its [website](#)..

**Community Futures South Georgian Bay (CFSGB)**: It is a not-for-profit Community Futures Development Corporation sponsored by the Federal Economic Development Agency for

Southern Ontario. Its purpose is to develop and diversify the local economy, and provide business resources for new and expanding businesses, including tourism businesses, by providing business loans up to \$300,000, business coaching/mentoring program, business counselling, and support for community economic development. It services multiple municipalities including the Town of Collingwood, Clearview Township, the Town of The Blue Mountains, the Town of Wasaga Beach, the Municipality of Meaford, and Dufferin County. To learn more, visit their [website](#).

**Simcoe Muskoka Skillforce (SMS)**: It is a not-for-profit organization that was the first organization in Ontario to amalgamate the functions of a Regional Literacy Network and a Local Workforce Development Board, both of which are funded mainly by the Ministry of Labour, Immigration, Training and Skills Development through Employment Ontario. More specifically, it supports the Literacy and Basic Skills Program, which offers a variety of adult skills upgrading programs including communication, numeracy, digital literacy, critical thinking, problem solving, and other essential everyday employability skills. Additionally, the organization helps improve understanding of, and coordinates with, community responses to labour market issues and needs by gathering

information about the supply of labour and the demand side of the local labour market. It works with employers to identify and meet their current and emerging skills needs. To learn more, visit their [website](#).

## Provincial Level

**Destination Ontario (DO)**: It is the lead tourism marketing organization for Ontario, and was established in 1999 as an agency of Ontario’s Ministry of Tourism, Culture and Gaming. Its role and responsibilities (mandate) include marketing Ontario as a travel destination, undertaking joint marketing initiatives with the tourism industry, supporting and assisting the marketing efforts of the tourism industry, and cooperating with the tourism industry, Government of Ontario, other governments and other agencies of government, to promote Ontario as a travel destination. It provides visitor-facing supports and resources through its consumer [website](#), and industry support and resources through its industry [website](#).

**Tourism Industry Association of Ontario (TIAO)**: It works on behalf of its membership to take on pressing policy issues that impact the Ontario tourism industry by providing evidence-based policy recommendations. Its mandate is to connect the industry with a unified voice on behalf of a diverse, inclusive tourism industry in Ontario and to be

the principal authority and driver of economic and regulatory policies that are conducive to the sustainable growth and prosperity of the Ontario Tourism Industry. Its membership, which includes tourism businesses and operators, destination marketing organizations, regional tourism organizations, and educators, represents most tourism businesses and employees across the province. It also provides industry supports and resources through its industry [website](#).

**Indigenous Tourism Ontario (ITO)**: It is the province’s first and only dedicated Indigenous tourism organization that focuses on uniting communities, organizations and industry leaders to support the growth of Indigenous tourism in Ontario. It provides visitor-facing supports and resources through its consumer [website](#), and industry support and resources through its industry [website](#).

**Festivals and Events Ontario (FEO)**: It is a membership-based non-profit organization that represents the festivals and events industry in Ontario. Its mission is to support a lively, engaged, and dedicated festival and event industry by sharing knowledge, enabling networking, and providing leadership on education, advocacy, and promotion. Their membership includes festivals, events, suppliers, municipalities, schools,

regional tourism organizations, destination marketing organizations, business improvement areas, among others. To learn more, visit their [website](#).

**Attractions Ontario (AO)**: It is a membership-based association that provides information to consumers to discover Ontario's destination experiences. Its purpose is to provide a platform for growth and success by encouraging attendance and business activity for its members and advertisers, to excite the public to engage in Ontario's rich offerings of attraction and tourism experiences, and to inform and advocate for Ontario's attractions and trip motivators. To learn more, visit their [website](#).

**Ontario By Bike (OBB)**: It is an established business network managed by the non-profit organization Transportation Options, which is dedicated to fostering sustainable transportation and tourism ideas and innovations. The network works to develop and promote cycle tourism in Ontario, inspiring visitors and residents to explore more by bike. It identifies great places to cycle, links to useful cycling maps and itineraries with stops at certified bicycle friendly businesses enroute. The network of bicycle friendly businesses is open to accommodations, food services, attractions, cycling-related businesses and organizations interested in cycling tourism. To learn more, visit their [website](#).

### **Ontario Tourism Education Corporation**

**(OTEC)**: It is a not-for-profit tourism and hospitality workforce development organization for Ontario. It delivers award-winning skills training, consulting, research and insights – guiding workforce strategy and evidence-based investment. It leads Tourism SkillsNet Ontario – an award-winning alliance of industry partners that leverages provincial collaboration and investment to tackle skills, labour and strategic challenges at the local level, offering customized solutions to address these challenges and to build an empowered, resilient and thriving industry. Specifically, its mission is to provide through leadership and dynamic execution to build skills, capacity, and competitiveness throughout the workforce life cycle, and to connect and guide industry and community partners through research, technology, skills development, and strategic opportunities to foster a thriving and sustainable tourism and hospitality sector. To learn more, visit their [website](#).

### **Ontario Restaurant Hotel & Motel**

**Association (ORHMA)**: It is a membership-based association and the largest provincial hospitality association in Canada. It represents the hospitality industry's interests at both the provincial and municipal levels of government, including providing pertinent and timely advice on industry-specific issues to politicians across the province. It also

provides meaningful cost-saving programs and unique educational services for its membership. To learn more, visit their [website](#).

### **Travel Industry Council of Ontario**

**(TICO):** It is a not-for-profit corporation mandated by the Government of Ontario to administer the Ontario Travel Industry Act, 2002 and Ontario Regulation 26/05 which governs all of the approximately 2,400 travel retailers and travel wholesalers registered in Ontario. It also administers an industry-financed Travel Compensation Fund. Its mission is to regulate consumer protection by promoting awareness, education, and compliance as part of the efficient and effective regulation of Ontario's travel industry. To learn more, visit their [website](#).

### **Waterfront Regeneration Trust (GLWT):**

It is a not-for-profit organization with a mandate to expand the vision of the Waterfront Trail to the Great Lakes and make sure people have access to the largest group of freshwater lakes on earth. It's trail, the Great Lakes Waterfront Trail, spans 3600 kilometres and moves along most of Southern Ontario, including the Town of Collingwood, and parts of Northern Ontario. The organization works to ensure the presence and expansion of the trail network. To learn more, visit their [website](#).

**Resorts of Ontario (RO):** It an industry organization that represents over 100 resorts in Ontario, including full serve and self-catering resorts like resort hotels, resort lodges, cottage resorts, and country inns. To learn more, visit their [website](#).

## **National Level**

**Destination Canada (DC):** It is a Crown corporation wholly owned by the Government of Canada and formed under the Canadian Tourism Commission Act. Its mission is to influence supply and build demand for the benefit of locals, communities, and visitors through leading research, building alignment with public and private sectors, and marketing Canada nationally and abroad. In collaboration with their partners, they promote Canada as a premier four-season leisure and business tourism destination around the country and world. It provides visitor-facing supports and resources through its consumer [website](#), as well as industry-facing supports and resources through its industry [website](#), and its Canadian Tourism Data Collective [website](#).

### **Tourism Industry Association of Canada (TIAC):**

It is a national private-sector advocate for Canadian tourism businesses and promotes positive measures that help the industry grow and prosper. Its mission is to be the voice of Canada's tourism industry and improve its

global competitiveness as an international destination through leadership and advocacy. To learn more, visit their [website](#).

### **Indigenous Tourism Association of**

**Canada (ITAC):** It is an association that focuses on creating partnerships between associations, organizations, government departments and industry leaders from across Canada to support the growth of Indigenous tourism across Canada. It provides services to Indigenous tourism operators and communities, or those looking to start a cultural tourism business. These include economic development advisory services, conferences, professional development training and workshops, and industry statistics and information. To learn more, visit their [website](#).

**Tourism HR Canada (THRC):** It is a pan-Canadian organization with a mandate aimed at building a world-leading tourism workforce. It facilitates, coordinates, and enables human resource development activities that support a globally competitive and sustainable industry and foster the development of a dynamic and resilient workforce. It does this by supporting with skills, productivity, and job design; supply, attraction, and retention; learner and labour mobility; labour market/human capital strategies; professional standards; employer investment in training; improved curriculum to respond

to market demands; quality assurance, program accreditation, rating programs; facilitate policy discussions; and labour market adjustments. To learn more, visit their [website](#).

**Culinary Tourism Alliance (CTA):** It is a not-for-profit organization focused on food tourism development. Its mandate includes to be a global leader in diverse and inclusive culinary and agritourism destination development, build destinations' taste of place, foster stakeholder engagement and relationship building, seek and encourage mutually beneficial partnerships, and promote authentic tastes of place. It also manages the FeastON program which is North America's largest and longest running local food certification program that recognizes businesses across the food tourism value chain committed to sourcing Ontario grown food & drink. To learn more, visit their [website](#).

**Sports Tourism Canada (STC):** It is an organization founded through a partnership with the former Canadian Tourism Commission with the goal to increase Canada's capacity to attract and host sport tourism events. Its mission is to enhance Canada's ability to attract and host premier sport tourism events by building strategic partnerships, providing education resources, facilitating networking opportunities, advocating for policy and investment, showcasing

Canadian success, offering business-to-business connections, and promoting economic impact and the use of STEAM (Sports Tourism Economic Assessment Model). To learn more, visit their [website](#).

### **Canadian LGBT+ Chamber of**

**Commerce (CGLCC)**: It is a chamber of commerce that exists to support 2SLGBTQI+ entrepreneurs and reduce barriers for them. Its mission is to enable the 2SLGBTQI+ business community to grow through advocacy, education, capacity building and connections in partnership with allies who share their vision. They offer a variety of programs designed to elevate 2SLGBTQI+ businesses and foster great diversity and inclusion across Canada's economy. One of these programs is their Rainbow Registered program which helps businesses, organizations, and communities certify their status as 2SLGBTQI+ friendly. It also provides support to businesses around tourism and the 2SLGBTQI+ visitor. To learn more, visit their [website](#).

### **Travel Media Association of Canada**

**(TMAC)**: It is a not-for-profit membership-based organization that represents accredited professionals and experts in the field of travel. These include Canadian writers, photographers, videographers, bloggers, and social media curators, as well as highly respected media relations representatives of the travel industry in

Canada, and around the world. Its mission is to create positive space for travel media and travel industry professionals to cultivate relationships that result in relevant collaborative, comprehensive opportunities and successful outcomes to foster and inspire travel. To learn more, visit their [website](#).

**Trans Canada Trail (TCT)**: It is an organization that advocates for, stewards, and champions Canada's nationwide trail system of 28,000 kilometres, providing leadership and guidance, funding and resources, outreach and engagement. Its mission is that through collaboration and partnerships, they lead, develop, and steward an accessible nationwide system of connected urban and rural trails. Its strategic priorities include connecting communities across Canada, developing a lasting trail for future generations, fostering a thriving Canadian trail sector, and facilitating great outdoor experiences. To learn more, visit their [website](#).

## **International**

**UN Tourism (UNT)**: Formerly known as the United Nations World Tourism Organization, the organization is the United Nations specialized agency for tourism and the global leader of tourism for development, driving social and economic change to ensure that "people and planet" are always centre stage. To learn more, visit their [website](#).

### **Global Sustainable Tourism Council**

**(GSTC):** It is an independent and neutral organization that represents a diverse and global membership, including national and provincial governments, leading travel companies, hotels, tour operators, NGO's, individuals and communities. Its mission is to be an agency of change in the world of sustainable travel and tourism by fostering the increased knowledge, understanding, adoption, and demand for sustainable tourism practices. To learn more, visit their [website](#).

### **World Travel & Tourism Council**

**(WTTC):** It is a voluntary organization with a mission to maximize the inclusive and sustainable growth potential of the Travel & Tourism sector by partnering with governments, destinations, communities, and other stakeholders to drive economic development, create jobs, reduce poverty and foster peace, security, and understanding in the world. Its research, which quantifies the direct and total impact of Travel & Tourism on the economies in terms of GDP and employment growth, has helped to raise awareness of the economic contribution of the industry and continues to feature heavily in the media and in Governments. To learn more, visit their [website](#).

*It is important to note, there are many other organizations at the international level working on specific types of tourism that should be kept in mind for the future. These include, but are not limited to the International LGBTQ+ Travel Association (IGLTA), World Food Travel Association (WFTA), European Network for Accessible Tourism (ENAT), World Indigenous Tourism Alliance (WINTA), Wellness Tourism Association (WTA), International Social Tourism Organization (ISTO), Cruise Lines International Association (CLIA), Coach Tourism Association (CTA), Faith Travel Association (FTA), Global Golf Tourism Organization (GGTO), and International Ecotourism Society (IES).*



## Appendix D – Environics Personas for Collingwood

For the Town of Collingwood, the four (4) priority groups identified by BP Insights using Environics PRIZM segment profiles collected in 2022 are in order of importance:

- + **TG3 - Affluent Established Families (Total of 44,675 unique visits & 143 index in 2022)**, who are 55-75 years old, *older to mature families with teen and young adult children living at home* in urban and urban fringe neighbourhoods. This group has an affinity for cultural events. Marketing materials that incorporate diversity may speak to them.
- + **TG4 – Affluent Suburban Families (Total of 31,054 visits & 131 index in 2022)**, who are 55-75 years old, *older to mature families with teen and young adult children living at home* in suburban areas.
- + **TG2 - Exploring Country Couples (Total of 30,907 visits & 250 index in 2022)**, who are over 65 years old, and comprised of *older to mature couples without children at home* living in rural and suburban settings. They gain pleasure and peace of mind by immersing

themselves in the natural world. Marketing materials that reflect Canadian values may resonate well with this group.

- + **TG1 - Countryside Families (Total of 29,494 visits & 131 index in 2022)**, who are over 45 years old, and made up of *middle-aged to older families with school-aged children* as well as empty-nesters living in suburban and rural areas. They find natural relaxation and turn to the outdoors in their leisure time. Marketing materials that highlight Canadian authenticity and culture may resonate with them.

Relevant information to tourism sector was collected from the four (4) target groups, including their demographics, travel insights, interests and activities, marketing, and competitors.

### Demographics

What follows is insight into the demographics of the four main target groups including their marital status and family composition, and their origin location. Overall, visitors in all four (4) target groups are mostly married or in common law relationship and have kids living at home that range from teenagers to young adults, except TG2 - Exploring Country Couples who have no children at home. Interestingly, TG2 – Exploring Country Couples has a higher-than-

average index of having couples without kids at home, and being a 2-person household.

Additionally, top visitor origins include Ottawa, Greater Toronto & Hamilton Area, Southwestern Ontario, Southeastern Ontario, and Peterborough and the Kawarthas. When marketing to these target groups it will be important to provide messaging around activities for couples and families and marketing to those origin location with high unique visitor counts and high indexes.



## TG1 - Countryside Families

### PRIZM Segments:

14/19/24/25/33/48

### Marital Status & Family Makeup:

- + 63.3% Married/Common law (114)
- + 50% Couples with kids at home
- + 2 person household size (34.7%, 110)
- + 4 person household size (18.9%, 119)
- + Higher index of 5+ person household size (11.6%,113)

### Visitor Origins:

*(By highest to lowest unique visitor count with its related index number)*

- + Ottawa (43)
- + Hamilton (157)
- + London (60)
- + Guelph (167)
- + Cambridge (307)
- + **Others:** Clarington (Durham Region) (612), Norfolk County (393), Caledon (466), and Halton Hills (389)

### Cultural Diversity Index & Official Language

Low - English

## TG2 - Exploring Country Couples

### PRIZM Segments:

21/41/45/49

### Marital Status & Family Makeup:

- + 61.4% Married/Common-law (110)
- + 52% Couples without kids at home (146)
- + 2 person household size (42.7%, 135)
- + 1 person household size (26.6%, 103)

### Visitor Origins:

*(By highest to lowest unique visitor count with its related index number)*

- + Greater Sudbury (240)
- + Peterborough (350)
- + Sarnia (358)
- + Kawartha Lakes (792)
- + Norfolk County (641)
- + **Others:** North Bay (404), and Haldimand County (415)

### Cultural Diversity Index & Official Language

Low - English

## TG3 - Affluent Established Families

### PRIZM Segments:

1/2/3/6/7/9

### Marital Status & Family Makeup:

- + 61.3% (110) Married/Common law
- + 53.3% (111) Couples with kids at home
- + 2 person household size (32.7%, 103)
- + 4 person household size (20%, 126)

### Visitor Origins:

*(By highest to lowest unique visitor count with its related index number)*

- + Toronto (131)
- + Ottawa (142)
- + Markham (405)
- + Vaughan (172)
- + **Others:** Burlington (132), Oakville (225), and Richmond Hill (374)

### Cultural Diversity Index & Official Language

Low-Medium - English

- + Asian Sophisticates (High) – Non-official Language
- + Mature & Secure (Medium) - English

## TG4 - Affluent Suburban Families

### PRIZM Segments:

4/5/8

### Marital Status & Family Makeup:

- + 63% (113) Married/common law
- + 63.7% (133) Couples with kids at home
- + 4 person household size (27.7%, 175)
- + 2 person household size (25.7%, 81)
- + High index for 3 person household size (19.9%,122), and 5+ person household size (17.1%, 166)

### Visitor Origins:

*(By highest to lowest unique visitor count with its related index number)*

- + Ottawa (133)
- + Mississauga (173)
- + Hamilton (101)
- + Vaughan (466)
- + Others: Burlington (234), Oakville (450), and Richmond Hill (268)

### Cultural Diversity Index & Official Language

Low-Medium - English

- + Multiculture-ish (High) – Non-official Language

## Travel Insights

What follows is insights into the travel insights of the four (4) main target groups including travel frequency, vacation spending, and accommodation preferences. Overall, visitors in all four target groups have taken approximately 3.5-3.6 out-of-town vacations in the last three (3) years.

All four groups spent on average \$1,718-\$1,789 on their last trip, and overall, one-third of visitors spent under \$500, followed by approximately 20% spending \$1,000-\$1,999, and approximately 15% spending \$500-\$999. Interestingly, TG3 – Affluent Established Families and TG4 – Affluent Suburban Families both show a higher-than-average index of visitors spending over \$3,000 per trip.

Overall, all the target groups prefer staying at hotels, followed by friends and relatives, all-inclusive resorts, and camping, with TG1 – Countryside Families and TG2 – Exploring Country Couples showing a higher-than-average index preferring to camp. Additionally, both TG1 – Countryside Families, and TG2 – Exploring Country Couples showed a higher-than-average index of visitors preferring to stay in an RV or camper, while TG3 – Affluent Established Families and TG4 – Affluent Suburban Families showed a higher-than-average index of visitors preferring to stay on a cruise ship.

When thinking about marketing and developing packages, it is important to consider the average budgets visitors are willing to spend, as well as the types of accommodations they prefer to stay in while travelling.

## TG1 - Countryside Families

### PRIZM Segments:

14/19/24/25/33/48

### Travel Frequency:

3.6 is the average out-of-town vacations taken in the past 3 years (102)

### Vacation Spending:

- + Average spend on last trip \$1,718 (102)
- + 31.4% spend under \$500 (105)
- + 17.9% spend \$1,000 to \$1,999 (87)
- + 15.1% spend \$500 to \$999 (94)
- + 14.2% spend \$4,000 or more (99)
- + Higher index of those spending \$3,000 to \$3,999 (9.9%, 129)

### Accommodation Preferences:

- + 55.4% Hotel (104)
- + 33.1% Friends/relatives (103)
- + 26.5% All-inclusive resort (104)
- + 19.1% Camping (126)
- + Higher index of Motel (14.5%, 113), Cottage (23.4%, 110), Condo/apartment (11%, 116), and RV/camper (8.4%, 173)



## TG2 - Exploring Country Couples

### PRIZM Segments:

21/41/45/49

### Travel Frequency:

3.6 is the average out-of-town vacations taken in the past 3 years (101)

### Vacation Spending:

- + Average spend on last trip \$1,772 (105)
- + 27.9% spend under \$500 (94)
- + 20% spend \$1000 to \$1,999 (97)
- + 15.7% spend \$500 to \$999 (98)
- + 15% spend \$4000 or more (105)
- + Higher index of those spending \$3,000 to \$3,999 (9.1%, 119)

### Accommodation Preferences:

- + 50.8% (95) Hotel
- + 30.7% (95) Friends/relatives
- + 20.7% (81) All inclusive resort
- + 17.4% (114) Camping
- + Higher index of Motel (15.3%, 120), B&B (13.8%, 111), RV/camper (10%, 205), Cruise ship (10.5%, 115), Boat (2.5%, 118)

## TG3 - Affluent Established Families

### PRIZM Segments:

1/2/3/6/7/9

### Travel Frequency:

3.6 is the average out-of-town vacation taken in the past 3 years (101)

### Vacation Spending:

- + Average spend on last trip \$1,789 (106)
- + 29.1% spend under \$500 (98)
- + 18.6% spend \$1000 to \$1999 (91)
- + 15.3% spend \$500 to \$999 (96)
- + Higher index of those spending \$3000 to \$3999 (8.5%, 110), and \$4000 or more (16.5%, 116)

### Accommodation Preferences:

- + 55.7% (105) Hotels
- + 32.4% (100) Friends/relatives
- + 26.8% (105) All inclusive resort
- + 13.6% (89) Camping
- + Higher index of Condo/apartment (10.6%, 111), Cruise ship (11.6%, 127), Package tours (4.7%, 116), and Spa resort (3.1%, 111)

## TG4 - Affluent Suburban Families

### PRIZM Segments:

4/5/8

### Travel Frequency:

3.5 is the average out-of-town vacation taken in the past 3 years (99)

### Vacation Spending:

- + Average spend on last trip \$1736 (103)
- + 30.6% spend under \$500 (102)
- + 19.5% spend \$1000 to \$1999 (95)
- + 15.7% spend \$4000 or more (110)

### Accommodation Preferences:

- + 57.7% (108) Hotels
- + 30.8% (96) Friends/relatives
- + 28.6% (112) All inclusive resort
- + 15.6% (103) Camping
- + Higher index of cruise ship (10.3%, 113)

## Interests & Activities

What follows is insight into the interest and activities visitors are interested in doing, including their top leisure activities, top local attractions, and top tourism activities. Overall, the top leisure activities for TG1 – Countryside Families and TG2 – Exploring Country Couples are the same, including ATV/snowmobiling, water-based activities. In comparison, TG3 – Affluent Established Families and TG4 – Affluent Suburban Families are both interested in downhill skiing, while TG3 – Affluent Established Families are also interested in cross-country skiing, snowshoeing, and golfing, and TG4 – Affluent Suburban Families are also interested in power boating and jet skiing.

Similarly, the top local attractions for TG1 – Countryside Families and TG2 – Exploring Country Couples are similar; however, TG2 – Exploring Country Couples are interested in a mix of sports, parks, and festivals and events, while TG1 – Countryside Families are interested in sports and local, provincial and national parks. In comparison TG3 – Affluent Established Families are interested in a

mix of cultural heritage and theme parks, while TG4 – Affluent Suburban Families are interested in theme parks, skating, jogging, and playing video games.

Overall, every target group has swimming as their top tourism activity. Other top activities overall include camping; arts, crafts, sewing and knitting; cycling; playing video games; movies at the theatre/drive-in; bars and restaurants bars; and canoeing and kayaking. TG1 – Countryside Families has a higher-than-average index of camping, cycling, and canoeing and kayaking. TG2 – Exploring Country Couples and TG3 – Affluent Established Families have a higher-than-average index of canoeing, and TG4 – Affluent Suburban Families has a higher-than-average index of playing video games.

When thinking about marketing and developing packages, it is important to consider the types of activities visitors are interested in doing while travelling, and find overlooked assets in Collingwood that may cater to some of these interests, such as playing video games

## TG1 - Countryside Families

### PRIZM Segments:

14/19/24/25/33/48

### Top Leisure Activities: *(By highest to lowest)*

- + ATV/ Snowmobiling
- + Power Boating/ Jet Skiing
- + Fishing/Hunting

### Top Local Attractions: *(By highest to lowest)*

- + Sporting events/racing events/air shows
- + National or provincial parks
- + Parks/city gardens

### Top Tourism Activities:

*(By highest to lowest unique visitor count with its related index number)*

- + 57.2% Swimming (106)
- + 44.5% Camping (112)
- + 43.8% Arts, craft, sewing & knitting (107)
- + 43% Cycling (112)
- + 39.6% Playing video games (94)
- + 38.3% Canoeing & kayaking (111)
- + 37.9% Movies at a theatre/drive-in (101)
- + **Others:** parks & city gardens (37.6%, 117), exhibitions, carnivals, fairs & markets (34.3%, 112), national or provincial parks (30.1%, 122), fishing & hunting (28.7%, 122), golfing (28.7%, 114), attend pro hockey (27%, 128)

## TG2 - Exploring Country Couples

### PRIZM Segments:

21/41/45/49

### Top Leisure Activities: *(By highest to lowest)*

- + ATV/ Snowmobiling
- + Power Boating/ Jet Skiing
- + Fishing/Hunting

### Top Local Attractions: *(By highest to lowest)*

- + Sporting events/racing events/air shows
- + Parks/city gardens
- + Exhibitions/ carnivals/fairs/markets

### Top Tourism Activities:

*(By highest to lowest unique visitor count with its related index number)*

- + 54% Swimming (97)
- + 42.4% Arts, crafts, sewing & knitting (104)
- + 42.4% Camping (106)
- + 40% Cycling (105)
- + 37.7% Playing video games (89)
- + 37.4% Movies at a theatre/drive-in (100)
- + 7. 37.4% Canoeing & kayaking (108)
- + **Other:** parks & city gardens (37.2%, 115), hiking & backpacking (37.1%, 111), exhibition, carnivals, fairs & markets (34.2%, 112), fishing & hunting (29.3%, 125), golfing (29.2%, 117), sporting events (27.6%, 147), national sports (27%, 110), and concerts – theatre

## TG3 - Affluent Established Families

### PRIZM Segments:

1/2/3/6/7/9

### Top Leisure Activities: *(By highest to lowest)*

- + Skiing – Downhill
- + Skiing – Cross Country/
- + Snowshoeing
- + Golfing

### Top Local Attractions: *(By highest to lowest)*

- + Historical Sites
- + Theme Parks/Waterparks/Water slides
- + Art Galleries/Museums/ Science Centres

### Top Tourism Activities:

*(By highest to lowest unique visitor count with its related index number)*

- + 55.5% Swimming (103)
- + 41.2% Playing video games (97)
- + 40.4% Cycling (106)
- + 40% Arts, crafts, sewing & knitting (98)
- + 38.4% Movies at a theatre/drive-in (102)
- + 38.3% Camping (96)
- + 38.3% Bars & restaurant bars (101)
- + 37.4% Canoeing & kayaking (108)
- + **Other:** Theatre – major theatres, halls & auditoriums (31.4%, 112),  
Concerts – Theatre & halls (25.8%, 112)

## TG4 - Affluent Suburban Families

### PRIZM Segments:

4/5/8

### Top Leisure Activities: *(By highest to lowest)*

- + Skiing – Downhill,
- + Power boating/jet skiing

### Top Local Attractions: *(By highest to lowest)*

- + Theme parks/waterparks/water slides
- + Ice skating
- + Jogging
- + Playing video games

### Top Tourism Activities:

*(By highest to lowest unique visitor count with its related index number)*

- + 56.4% Swimming (105)
- + 46.3% Playing video games (110)
- + 42% Camping (105)
- + 41.1% Arts, crafts, sewing & knitting (101)
- + 39.4% Cycling (103)
- + 39.3% Bars & restaurant bars (104)
- + 39.2% Movies at a theatre/drive-in (104)
- + Other: Theme parks, waterparks & water slides (25.1%, 124)



## Marketing

What follows is insight into the types of information used by visitors, including the top media channels they use, and their top internet activities. Overall, the top media channels include community and daily newspapers, and radio. However, both TG1 – Countryside Families and TG4 – Affluent Suburban Families identified TV. Additionally, TG2 – Exploring Country Couples identified magazines as a top media channel. Interestingly, the top internet activities for all four large groups are different and include things

like receiving store offers by SMS, using an online telephone directory, accessing travel content, or using apps.

When thinking about what medium to use for marketing purposes, it is important for Collingwood to consider the top media channels used, but also consider how visitors are using the internet to research a destination and the assets that exist there, such as local businesses, cultural centres, etc. For example, if visitors are using apps and scanning barcodes/QR codes, there may be an opportunity to share information using these mediums.

## TG1 - Countryside Families

### PRIZM Segments:

14/19/24/25/33/48

### Top Media Channels:

- + Community newspaper
- + Radio
- + TV

### Top Internet Activities:

- + Receive store offers by SMS
- + Click on an advertisement
- + Access a news site

## TG2 - Exploring Country Couples

### PRIZM Segments:

21/41/45/49

### Top Media Channels:

- + Magazine
- + Community newspaper
- + Radio

### Top Internet Activities:

- + Use online telephone directory
- + Enter online contests
- + Purchase products or services

## TG3 - Affluent Established Families

### PRIZM Segments:

1/2/3/6/7/9

### Top Media Channels:

- + Daily newspaper
- + Community newspaper
- + Radio

### Top Internet Activities:

- + Access travel content
- + Scan mobile tagging barcode/QR
- + Access automotive news/content

## TG4 - Affluent Suburban Families

### PRIZM Segments:

4/5/8

### Top Media Channels:

- + Internet
- + Radio
- + TV

### Top Internet Activities:

- + Use apps
- + Participate in an online social network
- + Use maps/directions service

## Competitors

What follows is insight around Collingwood's competitors based on other destinations that are attracting these four target groups. This includes neighbouring destinations also attracting the same target groups, and the top Canadian destinations these target groups visited in the last three (3) years.

Overall, the main neighbouring destinations attracting the same target groups include Clearview (Stayner), Midland, and Penetanguishene, with Wasaga Beach specifically attracting TG1 – Countryside Families, and Friday

Harbour and Alcona attracting TG3 – Affluent Established Families. Additionally, the top destinations visited by the four target groups include cottage country in general, Niagara Falls, and Toronto.

When thinking about marketing, it is important to differentiate Collingwood from these other destinations, and highlight the benefits of visiting this destination versus others. Additionally, there may be an opportunity to market Collingwood in these competitor destinations to build awareness of Collingwood as another destination with offerings aligned to their interests.

## TG1 - Countryside Families

### PRIZM Segments:

21/41/45/49

### Neighbouring Destinations Attracting the Same Target Group:

- + Wasaga Beach
- + Stayner
- + Midland
- + Penetanguishene

### Top Canadian Destinations Visited (Past 3 Years):

- + 28.1% Cottage Country (any) (114)
- + 21.7% Niagara Falls (96)
- + 21.4% Other Ontario (117)
- + 21.4% Toronto (106)
- + Higher index of those traveling to Calgary (6.1%, 113)

## TG2 - Exploring Country Couples

### PRIZM Segments:

21/41/45/49

### Neighbouring Destinations Attracting the Same Target Group:

- + Stayner
- + Midland
- + Penetanguishene

### Top Canadian Destinations Visited (Past 3 Years):

- + 23.3% Cottage country (any) (95)
- + 21.1% Toronto (105)
- + 18.6% Niagara Falls (82)
- + 16.6% Other Ontario (91)
- + Higher index of those travelling to Prince Edward Island (6.4%, 158), and Calgary (6.1%, 113)

## TG3 - Affluent Established Families

### PRIZM Segments:

1/2/3/6/7/9

### Neighbouring Destinations Attracting the Same Target Group:

- + Stayner
- + Midland
- + Penetanguishene
- + Friday Harbour
- + Alcona

### Top Canadian Destinations Visited (Past 3 Years):

- + 26.7% Cottage country (any) (108)
- + 22.6% Niagara Falls (100)
- + 18.6% Toronto (93)
- + 17.5% Other Ontario (96)
- + Higher index of those travelling to Montreal
- + (15.9%, 112), Ottawa
- + (14.7%, 112), Vancouver
- + (8.4%, 129), Other Nova Scotia (8.1%, 130), and Other Quebec (5.9%, 114)
- + Higher index of those travelling to Prince Edward Island (6.4%, 158), and Calgary (6.1%, 113))

## TG4 - Affluent Suburban Families

### PRIZM Segments:

4/5/8

### Neighbouring Destinations Attracting the Same Target Group:

- + N/A

### Top Canadian Destinations Visited (Past 3 Years):

- + 26.7% Cottage country (any) (109)
- + 26.3% Niagara Falls (116)
- + 21.4% Toronto (107)
- + 19% Other Ontario (104)
- + High index of those travelling to Montreal (17.1%, 120), Ottawa (15.6%, 120), Quebec City (8.8%, 121), Vancouver (7.4%, 113), and Other Quebec (6.2%, 120)

## Footnotes

- <sup>i</sup> Ministry of Tourism, Culture and Gaming & Ministry of Sport (2024). "[Tourism Research Statistics](#)." Government of Ontario. ; Government of Ontario (2024). "Tourism research statistics." Government of Ontario.
- <sup>ii</sup> Ministry of Tourism, Culture and Gaming & Ministry of Sport (2024). "[Tourism Regional Economic Impact Model](#)." Government of Ontario.
- <sup>iii</sup> Ministry of Tourism, Culture and Gaming & Ministry of Sport (2024). "[Tourism Regional Economic Impact Model](#)." Government of Ontario.
- <sup>iv</sup> Ministry of Tourism, Culture and Gaming & Ministry of Sport (2024). "[Tourism Research Statistics](#)." Government of
- <sup>v</sup> Statistics Canada (2007). "[Income and Expenditure Accounts Technical Series: Canadian Tourism Satellite Account Handbook](#)." Government of Canada (2007).
- <sup>vi</sup> World Travel & Tourism Council (2021). "[Towards Destination Stewardship: Achieving Destination Stewardship through scenarios & a Governance Diagnostics framework](#)."
- <sup>vii</sup> Deloitte (2024). "2024 Summer Travel Outlook: Canadian Destination in the Spotlight." Deloitte.; Allard Sarah (2023). "The Biggest Travel Trends to Expect in 2024." Conde Nast Traveller. Altschuler, Wendy (2024). "7 of 2024's Most Surprising Travel Trends." Forbes.
- <sup>viii</sup> Deloitte (2024). "2024 Summer Travel Outlook: Canadian Destination in the Spotlight." Deloitte.
- <sup>ix</sup> Deloitte (2024). "2024 Summer Travel Outlook: Canadian Destination in the Spotlight." Deloitte.







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