



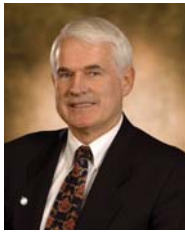
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LONG TERM TOURISM DESTINATION DEVELOPMENT STRATEGY **2009-2019**





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Message from Council



Regional Councillor
Joyce Frustaglio
Vaughan

York Region's Long Term Tourism Destination Development Strategy proposes directions and activities that The Regional Municipality of York can take over a 10-year period to develop a sustainable and prosperous tourism industry. It proposes to expand tourism attractors through smart investments, enhanced infrastructure and improvements to the quantity and quality of tourism products and experiences. The economic benefits are potentially enormous.

In York Region, overnight and same-day visitors spent \$335 million in 2007, contributing 0.4 per cent to our GDP and 0.7 per cent to our employment. But York Region is on the doorstep of Canada's most important destination — the City of Toronto — which receives 20 per cent of all domestic and international visitors to Canada and 10 per cent of spending.

We believe York Region can capitalize more on our proximity to the huge tourism market in Toronto. Our goal is to increase tourism's contribution to our regional GDP to one per cent by 2019 and to two per cent by 2029. This would represent tourist spending of \$1.1 billion. According to a provincial economic impact model, spending of this magnitude would generate more than 6,000 new jobs directly related to tourism.

This strategy is right for us now. During consultations earlier this year, we obtained input from our stakeholders, including local municipalities, tourism industry associations, tourism businesses and academic institutions. We learned there are many opportunities to expand and invest in York Region's tourism infrastructure. We are confident this strategy will help to ensure that tourism plays a vital role in supporting York Region's growth and prosperity.



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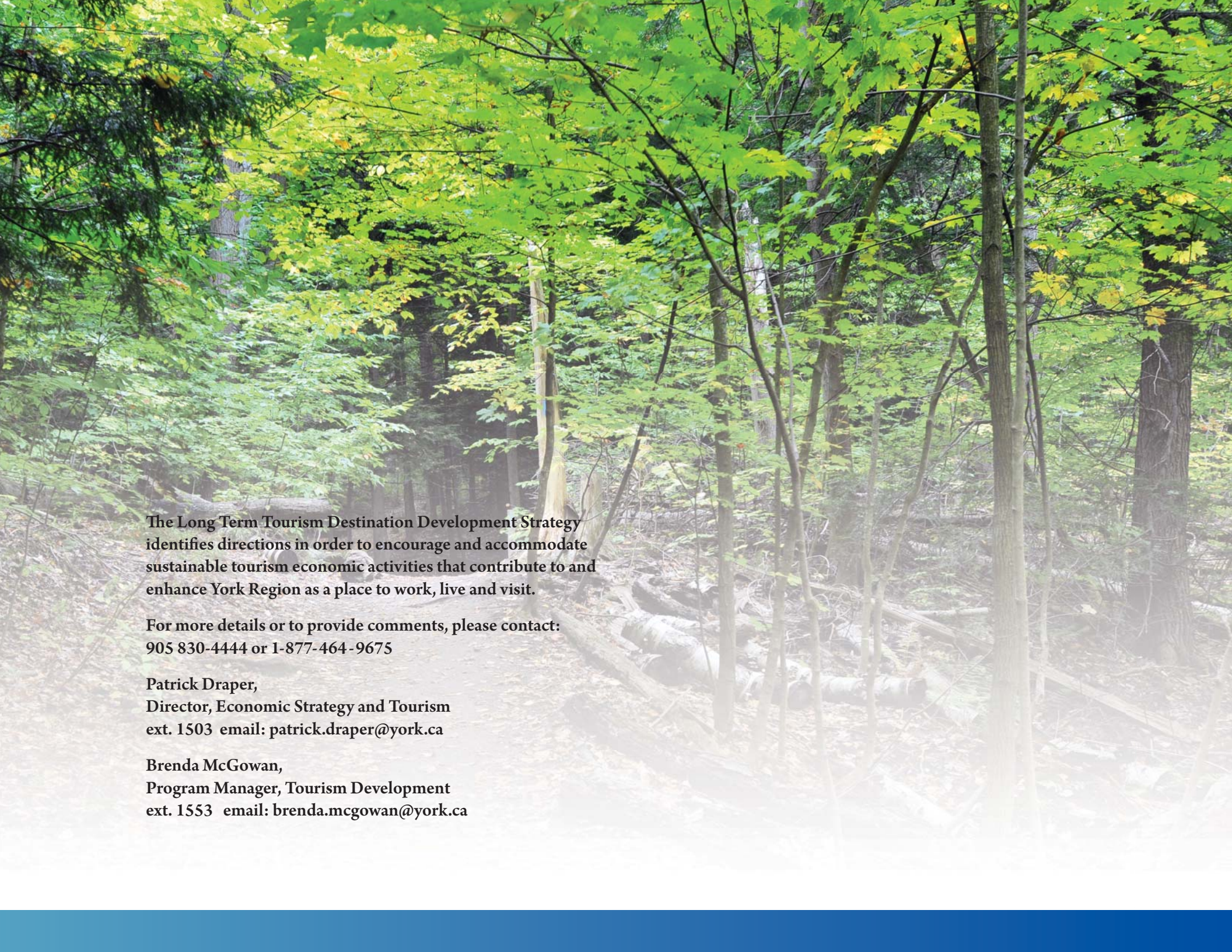
Mayor
James Young
East Gwillimbury



Mayor
Margaret Black
King



LONG TERM TOURISM DESTINATION DEVELOPMENT STRATEGY **2009-2019**



The Long Term Tourism Destination Development Strategy identifies directions in order to encourage and accommodate sustainable tourism economic activities that contribute to and enhance York Region as a place to work, live and visit.

**For more details or to provide comments, please contact:
905 830-4444 or 1-877-464-9675**

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Opportunities Presented Through Tourism

- Definition
- Economic importance



Opportunities Presented Through Tourism

Definition

Temporary travel for recreational, leisure, business or personal reasons to places outside a person's usual environment is known as "tourism". The businesses that provide these goods and services – from attractions to restaurants and lodging establishments – constitute the "tourism industry".

Economic importance

Tourism is becoming increasingly important to the Canadian economy. In 2007, its contribution to Canadian GDP stood at 2.0% with tourism spending close to \$71 billion. This accounted for 3.8% of all Canadian employment. Almost 30 cents of every dollar spent by visitors goes to government in the form of taxes on sales, property and income.

In 2006, a total of 627,400 people were employed in the businesses that constitute the tourism sector in Ontario. This represents 11% of all employment in Ontario and is the largest tourism labour market in Canada with 37.8% of the national total. Of these, 318,253 people, or 4.9% of Ontario's workforce, constitute the share of employment directly attributable to tourism.

Despite health, security and fuel issues shocks over the past 8 years, the Tourism and Hospitality labour market has been - and is projected to continue - growing by an average of 2% per year. At current growth rates, severe labour shortages will heavily impact small and medium sized businesses over the next decade. (Statistics Canada. Labour Force Survey, 2003, 2005 and 2006). Within 7 years, there will be 121,570 tourism-specific job vacancies in Ontario.

York Region's opportunity gap

In York Region, overnight and same-day visitors spent almost **\$334.9 million in 2007**, contributing only **0.4% to its GDP and 0.7% to its employment**. Although York Region is on the doorstep of Canada's most important destination: Toronto – with about 20% of all domestic and international visitors to Canada and 10% of spending – it is clearly not yet capitalizing on its close proximity to this recognized tourism destination. While Canadian Tourism GDP is growing faster than the national economy at 6.4% compared to 2.7%, its full potential has not been realized in York Region. Thus, **if tourism in York Region also accounted for 2.0% of its GDP**, this would represent more than a five-fold increase in **expenditure to over \$1.1 billion**. Spending of this magnitude would generate **\$440 million in taxes** for all levels of government and **create over 6,000 new jobs** directly related to tourism, according to the Ontario Ministry of Tourism's Economic Impact Model.

Economic spin offs

Goods and services that are sold as part of the travel experience are the only ones that must be consumed where they are produced, making tourism a very interesting “export” industry that can never be outsourced to other parts of the world. Visitors impact many businesses beyond what one might think of immediately as “tourism businesses” – hotels, restaurants, attractions –. From buying gas to purchasing local foods, antiques, arts and crafts, clothing to second homes, the revenues generated by tourist activity can make a big difference to a business’ profitability and even survival. This makes tourism a **potential catalyst for economic growth and employment**, and one that can also provide supplementary incomes to those seeking second jobs, part-time hours or another revenue source.

Other impacts

It is not just the economic importance of this sector though that makes travel and tourism so interesting to governments everywhere; it is also travel and tourism’s ability to sustain, support and nurture the environments and cultures it touches that makes it such a dynamic industry. Without the right strategies however, travel and tourism can also do much harm. The Premier Ranked Tourism Destination research framework completed in 2006 provided York Region a competitive performance assessment from a product, performance and futurity measure and identified initiatives which are supported in this strategy to address potential opportunities.

On top of key factors like relaxation, and escape, tourists are generally interested in the unique ‘differences’ of each region they

visit as well. From history, culture, and natural environment, to historic homes, museums, galleries, conservation areas, wetlands, and cultural and artistic events, most tourists are keen to learn and experience something that they can talk about when they return home. This demand to experience ‘differences’, and the revenues generated by it can lead to the creation and maintenance of local amenities, the upgrading and re-use of derelict land and buildings, the protection of natural and built heritage, and the provision of programs for events, arts, sports and other culture – all of which contributes to building distinct communities that can boast a great quality of life for their residents.

Integration into York Region’s policy framework

Over the last decade, York Region has been very progressive. The Region’s Official Plan has a strong focus on social, environmental and economic sustainability, and on managing the very rapid population growth by ensuring that services and infrastructure are in place for healthy communities. Further, York Region is working on creating a viable, ‘liveable’ and sustainable environment through its greening and natural heritage strategies, and on ensuring economic vitality of the Region through a diverse and competitive economic base. “A Vibrant Economy” – one of eight goals in Vision 2026 – supports the promoting of tourism strengths as an action area. Tourism, if integrated appropriately, creates sustainable economic activity and is supportive of environmental and socio-cultural community building as well.



The Regional Context

- York Region Municipalities
- York Region's planning environment
 - Taking inventory
 - Looking ahead



York Region Municipalities

Stretching from Steeles Avenue to the south shores of Lake Simcoe, York Region is a blend of nine unique municipalities offering multi-cultural urban settings, beautiful green spaces and charming country settings. Come discover York Region, it's all in your backyard.

Town of Aurora

905-727-1375 • www.e-aurora.ca

A premier heritage community in Canada, Aurora is the proud winner of the 2008 Prince of Wales Prize. The Town's rich built heritage includes Hillary House, a national historic site; the new Aurora Cultural Centre, housed in the historic Church Street School; and many other significant older neighbourhoods. Experience the Town's natural amenities including the Oak Ridges Trail, a recreational trail system of 25 km, 615 acres of parkland and challenging golf courses. Enjoy the variety of annual community events such as The Easter Egg Hunt, The World's Longest Street Festival, A Haunted Forest, The Santa Claus Parade and much more!

Town of East Gwillimbury

905-478-4282 • www.eastgwillimbury.ca

The rural and historic East Gwillimbury has plenty to offer. Visit the Sharon Temple, a designated natural historic site, and enjoy one of the many concerts and events taking place there. Play a variety of golf courses, enjoy a walk along a beautiful trail system or visit the weekly Summer Car Show on Saturday evenings. Come explore the Rogers Reservoir Conservation Area, home to one of the locks along the "ghost canal" system and a popular spot for birders and hikers.

Town of Georgina

905-476-4301 • www.visitlakesimcoe.ca

Georgina is a recreational playground located on the south shores of Lake Simcoe. Renowned as Ontario's original cottage country and the ice fishing capital of Canada. Home to Sibbald Point Provincial Park, the Georgina Arts Gallery, and one of Ontario's premier resorts - The Briars. Georgina is home to a handful of arts and cultural festivals, including the Eaglewood Folk Festival, JK Jazz Festival, Blue Bridge Chamber Music Festival, Georgina Studio Tours, and a highland games.

King Township

905-833-4016 • www.king.ca

King Township, located on the Oak Ridges Moraine is your rural oasis close to home. Experience the country and a more relaxed way of life. Join us for Farm, Studio and Garden Tours or load up your bikes and put on your hiking boots as King has some of the most beautiful country roads and hiking trails accessible all year round. Visit King for a day, or stay overnight at one of our bed & breakfasts, enjoy fine dining, or do a little antiques and home decor shopping.

Town of Markham

905-477-7000 • www.markham.ca

Markham is Canada's most diverse community and home to many of Canada's leading life science and technology businesses. It's an international community renowned for a rich heritage, vibrant neighbourhoods, and leadership on the environment and urban design. Markham was Recipient of the 2000 Prince of Wales award and the 2008 Lieutenant Governor's Ontario Heritage Award for Community Leadership. Explore Markham's 160 parks, 12 golf courses, a top performing arts theatre, Varley Art Gallery, the renowned Main Street – Unionville heritage district, and the Pacific Mall – the largest indoor Chinese mall in North America. Explore more of Markham at www.markham.ca.

Town of Newmarket

905-895-5193 • www.newmarket.ca

A unique blend of big city amenities and small town charm. The 1800's styled historic Newmarket Main Street offers an abundance of shopping, outdoor cafes and the Elman W. Campbell Museum. Stroll the Holland River Trail System. Enjoy the Artisan Festival, the York Shakespeare Festival and other year-round events at Fairy Lake.



Town of Richmond Hill

905-771-8800 • www.richmondhill.ca

From the scenic Lake Wilcox to the over 160 parks and trails, Richmond Hill is a breath of fresh air for anyone who wants to get out of the city. Plenty to do for all ages, including The Wave Pool, golf, shopping, diverse and ethnic dining as well as great festivals and events. Just north of Toronto near Highways 404 and 407, come experience Richmond Hill.

City of Vaughan

905-832-2281 • www.vaughan.ca

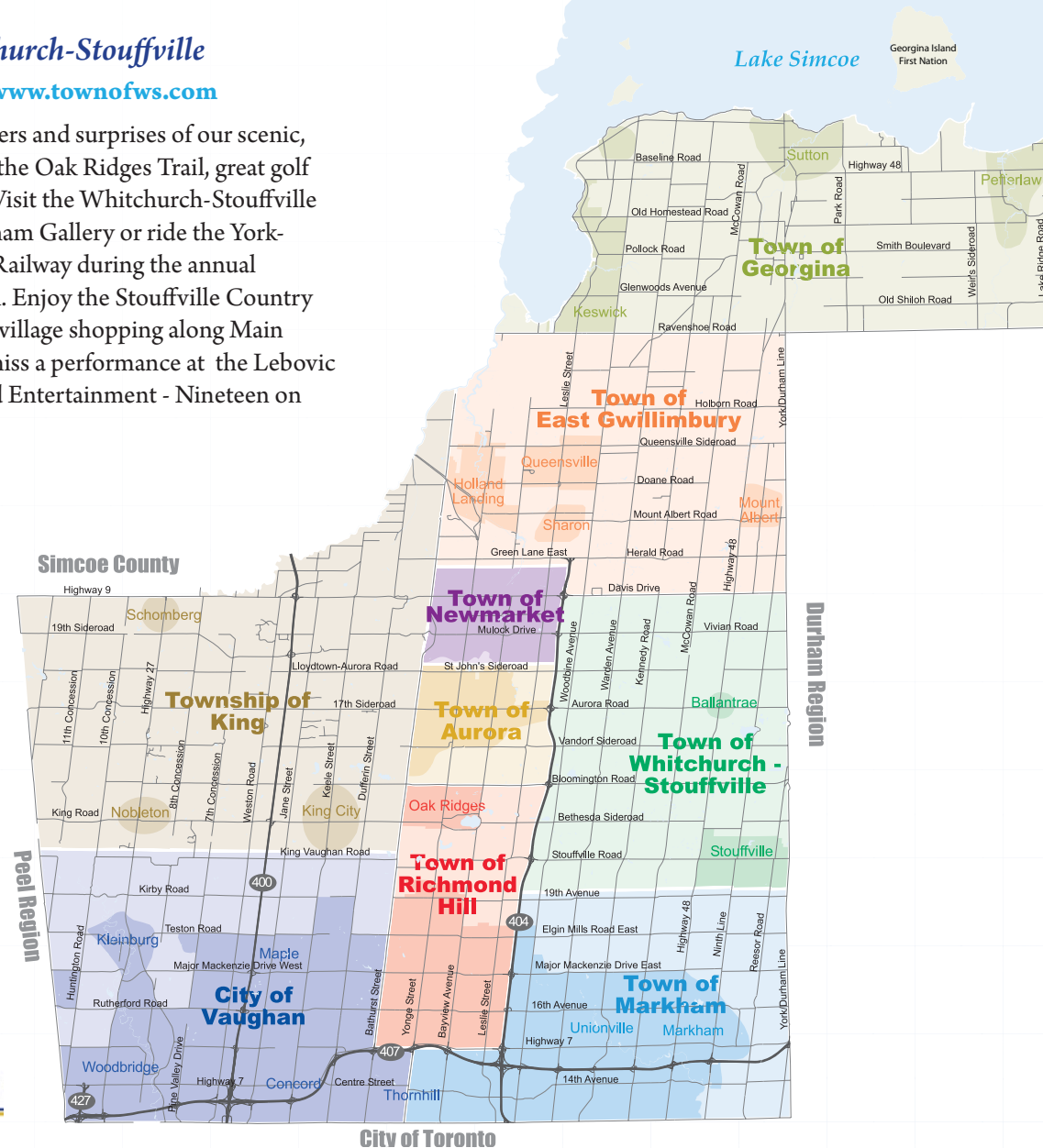
Vaughan is home to some of Canada's leading attractions including, Canada's Wonderland, the McMichael Canadian Art Collection and Reptilia; Canada's largest reptile zoo. For the shopaholics amongst us, Vaughan Mills is the premier shopping destination with over 250 specialty stores plus dining and entertainment all under one roof. For quieter pleasures, stroll picturesque Kleinburg, hike the trails at Kortright Centre or enjoy an Opera York performance. There's something for everyone to experience and enjoy.



Town of Whitchurch-Stouffville

905-640-1900 • www.townofws.com

Discover the wonders and surprises of our scenic, rural community - the Oak Ridges Trail, great golf and two wineries. Visit the Whitchurch-Stouffville Museum and Latcham Gallery or ride the York-Durham Heritage Railway during the annual Strawberry Festival. Enjoy the Stouffville Country Market or country village shopping along Main Street. And don't miss a performance at the Lebovic Centre for Arts and Entertainment - Nineteen on the Park.



The Regional Context

York Region's planning environment

In accordance with York Region's vision of sustainable development, all tourism related initiatives must also be sustainable to succeed. A sustainable tourism strategy offers a lasting competitive advantage that speaks to the needs and wants of employees, residents and travellers. It creates efficiencies and productivity by translating the concept of sustainability into practical actions. As a long-term commitment, it becomes an aggregate that explicitly conveys leadership and accountability to all stakeholders, and assists in integrating elements of the economy, environment and local community. Through its planning process, York Region has set three overarching goals that will also set the direction for tourism growth and development in the Region: (1) Healthy Communities, (2) Economic Vitality and (3) Sustainable Natural Environment.

Healthy communities

The Region's goal is to create self-sustaining and healthy communities that emphasize the human condition. To accomplish this and promote a comprehensive and cohesive sustainable tourism strategy, York Region is working on integrating the economy, environment and local community. Regional centres and corridors must uniformly acknowledge and accommodate the region's changing demographics, diversity, energy efficiencies and social cohesion. Tourism related services can be designed to support local infrastructure and domestic needs while representing an explicit commitment to bolstering the Region's quality of life. In doing so, the marketing and development of tourism related products and services would be designed to protect, enhance and leverage the Region's cultural diversity, heritage systems and natural resources. As a result, the tourism offering will be better positioned to promote a cohesive image that explicitly, as well as implicitly, addresses the expectations and values of the public, stakeholders and the Region's labour force. This 'image' must not only inform potential visitors but also educate and excite them. An initiative designed to both bolster and protect York Region Tourism, this objective will only be resolved through an integrated decision-making process that simultaneously considers land-use and infrastructure planning, human services and fiscal impact.

• York Region's planning environment • Taking inventory • Looking ahead

Economic vitality

Economic sustainability is one of the most important factors in the development of a comprehensive tourism strategy. York Region must realize efficiencies and savings, create attractive, balanced communities, and help attract a talented labour force and leading edge companies. Different, efficient and more affordable forms of transportation and north/south /east/west infrastructure enhancements must be sought and encouraged, strategic links and partnerships must be actively promoted between local vendors and suppliers and public and private sectors must work in concert to uniformly position the Region's commitment to the natural well-being of the environment and public alike. In doing so, the Region will be better positioned to attract organizations and employees that share similar aspirations. Such relationships will not only stimulate the region's economy through direct investment, but they will also help create employment opportunities, facilitate infrastructural development and further reinforce the Region as a destination. To ensure viable, long-term economic growth, corporate partnerships and the development in regional centers and corridors must provide socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities, as well as social services to the host communities.

Sustainable natural environment

York Region's natural environment is one of its strongest assets and affords the opportunity to be one of its most sustainable differentiators. With the Oak Ridges Moraine and The Green Belt comprising 69% of the region's land mass, the natural environment must be fully integrated in all strategic decisions. By leveraging and protecting its natural heritage, York Region will be better equipped to contribute to the quality of life of its residents and help attract new business to the region. With respect to the offering itself, all tourism products must be sustainable, environmentally-friendly and exercise corporate social responsibility. From a logistics standpoint, this could be encouraged by leveraging the region's ecological competencies through a local source food strategy designed to increase awareness about production, processing and distribution, and ultimately to link regional produce and independent restaurant owners to the actual tourist. This strategy would also reinforce the region's natural cohesion, creating an image as a whole that is more than the sum of its eclectic offerings. Moreover, this strategy would also leverage the region's inventory of attractions, including ecology (forests), historic villages, parks and artistic/cultural activities. As an aggregate, the tourism product would promote the stewardship of natural resources, job opportunities and human service provisions. For local operators it would ensure that distribution channels are safe, efficient and flexible, while minimizing the use of nonrenewable resources. For local patrons it would encourage a healthy lifestyle through the use of natural foods, methods of production and through an overall emphasis on the human condition.



York Region's planning environment

Role of York Region

While it is clear that there is an important role to be played by the private sector, only the regional government can strategically manage tourism to ensure that this economic sector plays a positive role in York Region's sustainability strategy, and that the pressures it may create on sensitive local and natural environments are minimized. The high quality physical environment so important to residents and visitors can only be maintained by regional and local municipalities. Since tourism relies on a wide range of services provided by the full range of departments in a municipality, tourism must be both a corporate consideration and responsibility, with the delivery, coordination and promotion of tourism combined in one body. For tourism to be sustainable, it is critical that the interests of tourism enterprises, tourists and local residents be balanced. This is best accomplished by the Region because of its ability to take a long term view and its responsibility for a range of functions that can influence tourism development, including spatial planning, development control, environmental management and community services.

Currently the Region is charged with the catalyst responsibility to market its nine Municipalities as an integrated four season tourism destination. Strong working relationships and partnerships with local municipalities, industry stakeholders and with key organizations, including the Ontario Ministry of Tourism, Ontario

Tourism Marketing Partnership Corporation, Tourism Industry Associations of Canada and Ontario, Economic Developers Council of Ontario, positions York Region Tourism as the lead destination marketing organization for the area. Building from this position of strength, York Region is well recognized and established to evolve its tourism role.

Local municipal efforts

Within the local municipalities, tourism promotion has traditionally been recognized as a function of their economic development, and sometimes parks and recreation departments. Some municipalities are more active, including the City of Vaughan which had a staff person with a tourism portfolio and the Town of Markham through Information Markham. As well, some Chambers of Commerce, Downtown Business Improvement Associations and the Board to Trade play a role. In addition, the Toronto and Region Conservation Authority also manages significant natural resources and facilities in partnership with governments, landowners and others that attract visitors to York Region. Unfortunately, all have limited resources and would thus benefit from a cohesive regional approach.



Taking inventory

Tourism performance

York Region currently attracts **2.9 million visitors**, and receives **\$334.9 million in tourism expenditures** a year. While this contribution is important, it falls far short of its potential. By simply increasing tourism to where York Region would receive its “fair share”, i.e. 2% of GDP as does Canada as a whole rather than its current 0.4%, the Region would receive over five times as much revenue. One of the most economically prosperous regions in Canada, York Region’s resident population is also growing rapidly. This constitutes a significant consumer market for many of the same attractions, events and facilities that appeal to visitors. Thus, there is considerable opportunity to build upon existing strengths, and to create new opportunities for growth.

To improve the sector’s viability and York’s competitiveness as a place visitors want to go, the Region’s strengths and opportunities are considered, leading to the identification of core product attributes and brand pillars, to better position York Region in the tourism marketplace.

Starting from a position of strength

Based on the Statistics Canada data and the Ontario Ministry of Tourism’s Regional Economic Impact Model research, tourism in York Region is growing. The number of visitors to the Region grew 42% from 2.1 million in 2001, to 3.0 million in 2004. Visitation numbers in 2006 were 2.7 million and 2.9 million in 2007, but

these numbers cannot be compared to the historical 2001 and 2004 data due to methodological differences in the data collection. Tourism expenditures grew almost 38% from \$152 million in 2001, to \$209 million in 2004. In 2006, the Region received \$248.4 million and \$335.9 million in 2007. The economic impact of tourism spending in 2007 in York Region was:

- \$189.7 million in total economic activity (GDP) for the Region and \$105.3 million in economic activity in other regions of the province;
- \$147.8 million in **taxes** for all levels of government: \$4.7 million in municipal taxes of which **\$502,735 are retained in York Region**;
- **3,445 tourism-related jobs** in the Region and almost 1400 jobs in other parts of Ontario;
- The Premier Ranked Tourism Destination assessment identified over 1,000 businesses and organizations in York Region that cater to tourism in some form –representing 4% of the 27,000 businesses identified in the York Region enterprise data.

By geographic origin, almost all of York Region’s visitors come from the **GTA and other parts of Ontario (88% of total visitation)**. Table 1 presents visitor profiles by geographic market.



Taking inventory

Ontario tourists

Ontario tourists to the Region are **primarily day visitors (76.5%)** who spend less than all other tourists (only \$81.6 per person versus \$205 for the average overnight visitor). Explaining the **low expenditure** is the fact that 61% of the Ontario tourists are visiting friends and relatives (VFR), and of those who stay overnight, the majority stays in a private home (90%). Ontarians are, however, attracted to shopping, the outdoors, sports events, and sightseeing, providing the opportunity to extend this segment's length of stay, and trip expenditure.



U.S. tourists

U.S. tourists, while only **5,6%** of total visitation to the Region, are much more likely to stay overnight (accounting for 15.7% of overnight visitors), and spend considerably more (\$311 per person) than Ontario tourists. U.S. tourists are the most likely segment to stay in commercial lodgings (37%). However, York Region currently attracts only 1% of the province's total U.S. visitation. Though difficult under current economic conditions, increasing U.S. visitors would undoubtedly have a positive impact on York's tourism sector.

Overseas tourists

Overseas tourists, primarily from Asia and Europe, represent 15.7% or 134,000 of York Region's overnight visitors. Also, tourism expenditures are highest at \$500 per person, and stays are longest at 14.9 nights. Interestingly, the majority of overseas tourists to the Region also stays in a private home (83%), and are visiting friends and relatives (63%). The relatively high proportion of overseas VFR tourists reflects the strong multi-cultural ties of the Region's ethnically diverse populations to their home countries. These linkages to foreign markets present great opportunity to attract increasing numbers of overseas tourists.

Other provincial tourists

Other provincial tourists represent the smallest share of total visitation (less than 0.5%). Yet, per person trip expenditures by other Canadians (\$682 is eight times that of Ontario tourists (\$85). Although this would make it an interesting segment, it is probably too small to warrant significant effort at this time.

Demographically, most tourists to York Region are adults traveling as couples or in groups without children who live in Ontario. **Almost 90% of travellers are adult only parties**, leaving only 10% of visitors that travel with children. School trips are not captured as part of the Travel Survey of Residents of Canada.

Meetings and conventions

Meetings and Convention (M&C) business is significant at 87,000 trips, but represents only 8% of total M&C trips to Ontario. M&C is a high yield market and one that York Region is well positioned for, given its proximity to Toronto. Also, being home to many corporate headquarters and major manufacturing facilities provides opportunity for attracting a greater number of business travellers, meetings and conventions.

Table 1. Visitor Profiles by Geographic Origins

An Overview of Tourism in York Region, Domestic and International Travel
Surveys 2007 — 2.9 million Visitors Spending \$334.9 million

Origin	Ontario	USA	Overseas	Other Provinces
# of Visitors	2,591,000 (90%)	161,000 (5.6%)	111,000 (3.9%)	14,000 (0.5%)
Same Day	1,981,000 (76%)	27,000 (17%)	16,000 (14%)	-*
Overnight	610,000 (24%)	134,000 (83%)	94,000 (86%)	14,000 (100%)
Tourism Spending	\$ 220 million (66%) Same day \$162 m Overnight \$58 m	\$50 million (15%) Same day \$ 2 m Overnight \$48 m	\$55 million (16%) Same day -* Overnight \$54 m	\$10 million (3%) Same day -* Overnight \$10 m
Length of Stay	2.2 nights	3.0 nights	11.6 nights	7.0 nights
Trip Purpose				
Visiting Friends and Relatives	61%	36%	63%	43%
Pleasure	28%	18%	15%	29%
Business	4%	36%	9%	-*

*too small to be captured when rounding

York Region's accommodation base

Accommodation properties in York Region are diverse in terms of quality and variety, as listed in Table 2. Property type also varies by location. Vaughan, Richmond Hill and Markham have a larger supply of branded hotels, while the northern municipalities contain more Bed & Breakfasts and campgrounds. The Briars Resort is the Region's only upscale resort property, and conference centre properties are limited to Eaton Hall and the Kingsbridge Centre. Accommodation occupancy was 63.3%% in 2007, just below a national industry average of 64.9%.

Table 2: York Region's Accommodation Base - 2007

Type of Accommodation	Properties	# of Rooms
RV Park/Campground	4	560
Bed & Breakfast	25	56
Camps	7	na
Lodge	1	6
Resorts	4	281
Conference Centres	3	202
Full Service Hotel - Chain	7	1,742
Limited Service Hotel - Chain	11	1,224
Extended Stay Hotel - Chain	4	497
Independant Motel	15	466
TOTAL	81	5,034

Source: PKF Consulting Inc. 2007, & Premier-Ranked Tourism Destination Research Project, 2006



Taking inventory

Attractions

Attractions in York Region range from the mega-theme park to the local fair. **The largest single attractor is Canada's Wonderland**, visited by some 3 million people annually. While most are same-day visitors from the GTA, there are additional area attractors that can extend the visitor experience, from fine restaurants to major retail facilities, notably Vaughan Mills and Pacific Mall. Additionally, the Region includes a variety of recreational attractions, such as the Richmond Hill Wave Pool and the Magna Centre in Newmarket. A small but growing attraction segment at the local farm level features a range of product from corn mazes to petting zoos and butterfly conservatories. Lastly, the recently opened Richmond Hill Centre for the Performing Arts, the largest of its kind in York Region, and the Lebovic Centre for Arts & Entertainment – Nineteen on the Park in Whitchurch-Stouffville, are bringing Canadian and international performing and visual arts to the Region.



Natural and cultural heritage

Natural and cultural heritage is quite diverse within York Region and draws both eco-tourists and recreationists for a variety of outdoor experiences in all four seasons. Numerous conservation areas such as Toronto Region's Conservation Areas including Boyd, Bruce's Mill and Lake St. George Conservation Areas, the Lake Simcoe Region Conservation Authority, Sibbald Point Provincial Park, the Oak Ridges Moraine Trail, the York Region Forest Tracts as well as the Rouge Park offer opportunities to

explore nature through recreational and sports pursuits. In addition, the Humber River, a Canadian Heritage River whose designation is based on human heritage, also provides substantial heritage interpretation opportunities.

With 60 golf courses in the Region, including Bathurst Glen that is Audobon certified and thus a leading model for sustainable golf practices, York has the potential to be a leading golf destination in Ontario. It is also known for its equestrian facilities, from stables to riding academies, and its agricultural products sold at farm gates and local markets.

York Region's natural and cultural attractions also lend themselves to attracting a much larger share of the learning travel and education market. For instance, the Living City Campus at Kortright has the potential to become a major environmental and sustainability education attraction for school groups, business travellers and leisure tourists. It already attracts over 100,000 visitors, and this number should increase significantly as programs and facilities are added to showcase renewable energy, green buildings, new technologies and sustainable transportation.

York's cultural attractions include 60 museums and galleries, 15 theatres, and over 125 performing arts festivals and events. Notable attractions include the Markham Theatre, the Sharon Temple, a national historic site in East Gwillimbury, and the McMichael Canadian Art Collection in Vaughan.

Looking ahead

York Region is poised for significant growth in tourism over the next few years. By taking advantage of the trends in consumer demands and addressing some of the underlying challenges the overall growth of tourism could be even stronger.

Growth in tourism

Total visits to Ontario declined by -2.5% in 2008, but start to increase again as of 2009 (by 0.5%). Demand in the province will largely hinge on the strength of domestic travellers, and hence consumer confidence and real disposable income. The latter is expected to increase by 2.4% in 2009 and 4.3% in 2010. However, the deepening financial crisis may very well see these projections downgraded.

High Growth –Diversified Economy

Over a thirteen year period ending 2004, GDP increased 112%, 56% more than Ontario's. York Region's employment increased from approximately 171,000 in 1986 to 462,000 in 2006. By 2031, the number of jobs is expected to increase by approximately 73% (336,000 jobs) to a forecasted 798,000 jobs.

Historically, manufacturing has been York Region's primary employer. However, there has been a progressive shift towards service related employment including business services, retail trade, education, health care and social assistance sectors.

The province's dependence on the automotive industry is forecasted to create economic challenges in the near future. This is highly relevant to York Region, where the new Canadian head office for Honda is set to open in Markham (2009), and which currently supports the head offices of Hyundai, Mazda and Magna International – the fourth largest automotive equipment supplier. The export sector and the led by manufacturing sectors are York Regions strongest employers. As home to many prominent International and Canadian head offices including IBM, Lexmark Canada Inc, Apple, American Express and Rogers Communications to name a few combined with the above projections and supported by the increase of companies moving to York Region provides strong incentive for augmenting the Region's current room inventory, as well as offering peripheral services and attractions (e.g., convention/trade centres) to capitalize on the influx of corporate demand.



Looking ahead

Rapid population growth

Continuing on as one of the fastest growing regions in Canada, York Region's population is forecast to add an additional 578,000 residents between 2006 and 2031, representing an average annual increase of 2% per year over the forecast period. With current population comprised of 40% new Canadians of which 36% are visible minorities, this diverse immigrant population growth presents many opportunities for tourism to build upon the cultural and social richness as well as increasing visitation from friends and relatives. One of the most economically prosperous municipalities in Canada, York Region boasts the highest average household income in the GTA at \$114,288, which is estimated to increase by over 20% by 2011.



-Visiting friends and relatives market

The rapid expansion in population has been accompanied by rapid growth in the visiting friends and relatives (VFR) segment, which accounts for a large portion of trips in Southern Ontario and is expected to stay strong. Of the key overnight activities in the region VFR accounted for 84%, shopping for 43%, and outdoor/sport activity for 50%.

Pleasure travel trends

One of the fastest growing markets is the Get Away/Mini Vacation segment due to the demands on dual-income households to schedule time, the stressors of longer work days, and the rise in the cost of living. These factors also play a considerable role in the rise of the Day Trip Market, which currently comprises 70% of the region's visits (2 million).

Business travel trends

Meeting and convention travel has shown a considerable growth over the last decade. This market is an important source of visitation for the accommodation sector, particularly in the spring and fall, which allows lodging operators to manage the seasonality of demand. One of the more relevant trends for this segment is the **growth in regional or local meetings rather than travelling great distances**. This trend bodes well for York Region's developing business presence: automotive (Honda, BMW, Mazda), information technology (IBM, Lexmark, Rogers), and biotechnology, as well as the Region's primary industries, manufacturing, construction and services. With the highest concentration of information technology businesses in Canada, York Region is also equipped to capitalize on the increasing emphasis on training and education, use of technology and maximizing value. Other notable trends with this segment include the increased tendency for convention attendees to take their families, and increased demand for pre and post facilities, service, activities and packages.

Activity and recreational trends

Adventure travel and ecotourism activities have gained considerable ground over the past few years due to increased interest in outdoor activities and environmental awareness. This market segment is predominantly made up of well educated 35-50 year olds, with relatively high income levels, who often work in professional or managerial occupations. Adventure activities, such as hiking, nature observation, natural history and those requiring heightened degrees of skill and risk are on the rise. This trend in conjunction with provincial policy, such as the Oak Ridge Moraine Conservation Plan and the Greenbelt Plan could be leveraged to position the region as an eco-tourism hub. Moreover, with environmental assets, such as the Holland Marsh (largest area of organic soil in Ontario), Oak Ridge Moraine (31% of the York Region), Rouge Park and Ontario's Greenbelt, 69% of the region is protected "green" space. This becomes an important distinction when considering strategic competencies and key differentiators.

Other niche interests

Historic attractions, cultural interpretation and experiences hold a lot of appeal for today's more educated traveller. Indoor family entertainment centres, such as an aquarium or live sporting events, or those utilizing new technology such as virtual reality and motion simulators, are gaining more interest for today's experiential traveller. Finally, tourism program packages offer the convenience that today's travellers are seeking. As more travellers become "time-starved" they are becoming more amenable to packages that speak to their niche interests (e.g., eco-tourism, family getaway, romantic weekend, culinary tourism). Appealing to the more sophisticated and value-conscious consumers, tourism programs are on the rise because they tend to be more participatory, interactive and educational (e.g., cultural/heritage programs).

Addressing challenges

Although there has been significant investment in tourism facility renewal, expansion and development as businesses continue to upgrade tourism product, York Region is not considered as a must see/must do destination. While York Region's core and supporting attractors offer collective appeal, they are not exclusive or unique product offerings. Although several of York Region's tourism operators including Angus Glen and Eagles Nest Golf Courses, Canada's Wonderland, Vaughan Mills, Sharon Temple and the McMichael Canadian Art Collection, have received notoriety and critical acclaim on a national scale, there are many tourism products that are underdeveloped and under performing.

The majority of municipal economic development initiatives have been geared more towards infrastructure to accommodate population and employment growth. This positions York Region well to manage growth in tourism.

York Region's greatest challenge in developing its tourism base is to create experiences that are memorable. Therefore, York Region must create sustainable differentiators and bundle its collection of experiences to move towards receiving critical acclaim and recognition of being "best in class". Since building "green" appears to be of concern and interest to all stakeholders, it could provide an opportunity to unify marketing initiatives with key business and tourism related strategies.

The challenge will be to **educate regional stakeholders on a unified image and to assist in the enhancement of underperforming products.**



Looking ahead

Accommodation Opportunities

In 2007, York Region's accommodation sector of 4,412 rooms achieved an occupancy of 63.3% at an average daily rate of \$112.67. Over the past 4 years, demand for accommodation has grown at an annual compound growth rate of 3.8%, from 877,400 occupied room nights in 2003 to over 1 Million occupied room nights in 2007. At the same time, supply has grown at a compound annual growth rate of 2.0%, from 4,069 rooms in 2004 to 4,412 rooms in 2007. With demand growth outpacing supply growth, there continues to be interest in private sector investment in the accommodation sector. **The challenge will be to increase overnight visitation, especially in the commercial segment.** This will require infrastructure and accommodations that are adequately supported. Currently, limited service-level facilities (e.g., Holiday Inn Express, Hilton Garden Inn, Courtyard by Marriott) are seeing the strongest growth in the region because of their lower construction costs, and both demand and price points within the region lead to stronger returns for these products (this phenomenon typically reflects price perception, socio-economics, and labour force characteristics). In addition, better transportation linkages (transit, shuttles) are needed with Lester B. Pearson International Airport, subway and GO Transit.



Reliance on same-day market

Due in part to the strength of VFR and same day travel, York Region is facing **visitor expenditures** that are **well below provincial averages**. The **challenge** facing the Region is to **encourage longer stays**. This can either be accomplished by **increasing the breadth of the offerings/attractions through development, bundling or packaging**, which can increase exposure and economic share, or by **increasing the average distance of the traveller to the Region** (via target segmentation and differentiation). The challenge facing the Region is what comes first? Can the Region first enhance the experience and in doing so be better positioned to encourage private sector investment to augment their product offering. Or, will the Region need to develop its product offerings to enhance the experience. Either way, York Region must be able to not only secure public and private sector involvement in the development of these products and experiences but also continue to work together to sustain them.

Strategic Directions

- Vision for York Region Tourism
 - Guiding principles
 - Opportunities for growth
 - York Region's brand pillars

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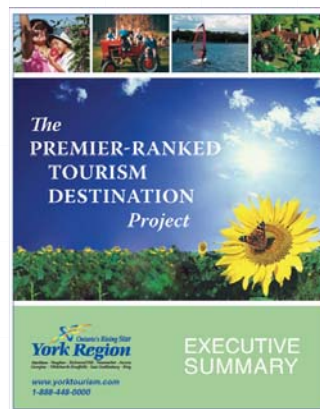
Building the strategy

York Region completed a very comprehensive assessment of its competitive position as a tourism destination in 2006. Known as the Premier Ranked Tourist Destination Framework, it takes into account the existing strengths of the Region, market projections and gaps in products and services that would allow it to capitalize on market demands. This research was the foundation from which the strategy was developed. Consultations with the York Region Tourism Advisory Group, local municipal economic development offices and tourism industry stakeholders provided further direction and guidance.

Point of Differentiation

In order to bring about economic vitality, the objective defined in the Region's official plan "to encourage and accommodate economic activities that contribute to the diversity of the economic base and to the cultural, recreational and institutional opportunities within the Region, enhancing the Region as a place to work, live and visit".

From a tourism perspective, York Region is seeking economic, social and cultural development based on sustainable tourism, which preserves the environment and respects local populations. It is seeking to establish itself as a tourist destination, building upon its cultural identity and the quality of its environment.



Vision for York Region Tourism

Economically viable, equitable and prosperous

While government has little influence over such things as fuel prices, currency fluctuations, global economies, there are areas within its jurisdiction, including planning coordination, infrastructure investment and ensuring an appropriate regulatory economic climate are in place, for industry to be successful.

Tourism must support a diverse industry without creating enclaves, but providing financially rewarding opportunities for entrepreneurs, organizations and employees. The level of tourist satisfaction must be maintained at a high level to ensure that the Region continues to be attractive and retains its commercial potential. Focusing on the right type of visitor – encouraging longer-stay tourism rather than day visitors and seeking higher-spending, year-round visitors – is critical in raising the economic contribution of tourism.

Environmentally viable, liveable and sustainable

The planning and management of tourist development must be conducted in such a way that it avoids triggering serious ecological problems in the Region, and indeed, the overall quality of the environment must be preserved and, if possible, improved. The natural habitat is a strong attractor for visitors, and therefore both control and management of natural resources are important. Ways of gaining support for conservation and restoration through tourism should be addressed. Transport and traffic management are major issues in environmentally sustainable tourism and actions must address transport to and within the Region as well as information and marketing of more sustainable alternatives than private car usage.

Socially and culturally rich, equitable and empowered

To ensure that local residents benefit from tourism, employment opportunities must be promoted widely throughout the Region. The necessary skills training that will also lead to improved pay and opportunities for historically more disadvantaged groups such as the disabled, seniors, immigrants and aboriginals. Historical and cultural resources must be preserved in a way that allows them to be used in the future, whilst benefiting today's society. A bottom-up approach, with the local community and businesses closely involved in determining a sustainable future, will ensure that community interests are taken into consideration in the development of York Region's long term destination development strategy.

Guiding Principles

The guiding principals provide a framework for action that supports York Region's future economic prosperity and long term fiscal competitiveness from a tourism perspective.

1. New and/or expanded tourism infrastructure development must be consistent with York Region's vision:

- Economic vitality;
- Sustainable development;
- Healthy communities;
- Enhanced environment, heritage and culture.

Any tourism development must also be evaluated against these aspects of York Region's vision:

- Quality communities for a diverse population;
- Responding to the needs of our residents;
- Managed and balanced growth;
- Infrastructure for a growing region;
- Engaged communities and a responsive Region.

Refer to attachment 1 for linkages to Vision 2026

2. Priority will be the achievement of the tourism goals identified in this strategy:

- Convert same-day visitors to overnight stays;
- Increase Visiting Friends and Relative expenditures;
- Attract greater share of longer-haul visitors;
- Increase business travel.

3. Strategic directions must be focused on strengthening, capitalizing on and leveraging the core and supporting product pillars as identified from the Premier Ranked research:

- Natural Outdoor Attractions and Recreational opportunities
- Cultural/Heritage Attractions and Events
- Urban/Rural Experiences and Activities
- Canada's Wonderland.

For the purposes of this document, these tourism experiences have been themed into the 3 brand pillars of:

- Wonderful attractions
- Great outdoors
- Rich traditions

4. Opportunities will be pursued that are based on identified market opportunities, and meaningful consultation with a broad range of tourism stakeholders.

5. Preference will be given to opportunities that benefit the Region as a whole, not just economically, but socially and environmentally.

6. Priority will also be given to training, transportation, infrastructure development and other needs that support the identified opportunities.



Opportunities for growth

Based on York Region's current performance in visitation and market trends, there are essentially four distinct opportunities for growth:

- Convert same day visitors to overnight stays
- Attract more long haul visitors
- Increase visiting friends and relatives expenditures
- Increase business meetings, conferences and sport tournaments travel

Convert same-day visitors to overnight stays

Seventy percent (70%) of York's tourists are same-day visitors, who spend less than one-twelfth of the amount that an overnight visitor spends. These 2,025,000 excursionists consume their experience, on average, in less than three hours. To **encourage this huge segment to extend their stay**, and thereby increase their trip expenditure, requires that the attractions are either so big, that they cannot be seen in one day (this is Disney World's strategy) or cluster enough smaller facilities, attractions, services, natural and cultural resources that they constitute a destination with enough drawing power to encourage overnight stays. These product offerings need to be packaged and visitors need to be provided with the relevant information, and ticketing to attractions, tours, cultural and recreation events pre-arranged via online bookings. Affordable and a variety of accommodation options are also required to meet consumer needs.

Increase VFR expenditures

Overwhelmingly, the activity experienced by visitors to York Region is that of visiting friends and relatives (VFR), a large portion of whom stay in private homes, and spend much less than visitors staying in commercial lodgings. While York Region offers visitors a number of signature attractions, some with critical acclaim, many are underperforming and not widely promoted. **Enhanced in-region communication to educate and encourage local residents to take visiting guests to experience a wider range of product offerings is necessary.**



Attract greater share of long-haul visitors

The great majority of visitors to York Region are from a close geographic radius with some 90% from within the Province. **To bring in visitors from outside the Region, attractions must be “best in class” or have enough drawing power to make the trip worthwhile.** Long-haul travellers not only spend considerably more (\$311 for US visitors and \$500 for overseas) than provincial tourists (\$85), they also stay longer (over 2 weeks for overseas visitors). The high percentage of immigrants living in York Region maybe beneficial to achieve this but they must become more engaged in regional tourism offerings.

Table 1.8: Total Nights Spent: Average Length of Stay

Origin	Person Nights (000s)	Avg. length of stay (nights) - Total Overnight Visitors
Total	3,283	3.9
Ontario	1,355	2.2
Other Canada	99	7.0
U.S.	425	3.2
Overseas	1,405	14.9

Source: Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2007

Increase meeting and convention business travel

With the rapid expansion of York Region’s economic base in both manufacturing and services and the headquarters for many companies, it is ideally **positioned to attract a much larger share of the high yield business travel segment.** Ensuring the region has adequate meeting and convention venues with sufficient capacity is key to attracting this market segment. Not only is this segment a good source of revenue for the accommodation sector, but today’s business, meetings and convention traveller will look for opportunities to bring families, increasing demand for attractions, events and foodservices.

Table 1.10: Total and Average Visitor Spending

Origin	Total Visitor Spending (000s)		Average Visitor Spending per Person Visit	
	Total	Overnight Visits	Total	Overnight Visits
Total	\$334,865	\$170,832	\$116	\$200
Ontario	\$219,611	\$58,158	\$85	\$95
Other Canada	\$9,649	\$9,649	\$682	\$682
U.S.	\$50,205	\$48,266	\$311	\$360
Overseas	\$55,399	\$54,758	\$500	\$580

Source: Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2007



York Region's brand pillars

York Region's experiential positioning

Contemporary efforts in destination management have come to recognize the fundamental power of brand positioning in the development of tourism marketing strategy. Brand positioning is the resolution of the statement, “We’re the place that...”. Implied is the identification of some pre-defined space, traditionally a social ideal, where a destination is situated in the minds of travellers, residents and even operators.

For a destination to succeed in brand positioning it has to differentiate. It cannot be everything to everyone, but what it has to be is authentic. Consumers are savvy and demanding, and if the core product does not deliver on its promise then it cannot succeed.

For tourism destinations this can be quite difficult, especially when considering the multitude of stakeholders in both the public and private sectors. **Thus, it becomes imperative to streamline a branding and advertising positioning strategy and have the key players align under one flag.**

Based on the work done by York Region to develop a strategy for tourism, a brand emerges on the strength of three core attributes, or brand pillars: wonderful attractions, the great outdoors and rich traditions. These brand pillars help to define the Region, and provide focus for marketing and development activities, both public and private sector. The brand pillars match regional product with market opportunities, either independently, or in combination.

Opportunities for growth



Wonderful attractions – built attractions and accommodations

York Region features a range of attractions and accommodations. Canada's Wonderland is the number one attended theme park in the country, with 3 million people through its gates a year (including GTA residents within 40 kilometres *not* considered tourists). Region accommodators market special Canada's Wonderland hotel packages throughout the summer, and supporting attractors, such as Vaughan Mills and area restaurants, benefit from the high park visitation. Together, they constitute the foundation of what could become a major destination or tourism node within the Region by adding other types of year-round attractions, dining and lodging facilities. Furthermore, with the presence of the Ontario Soccer Centre (and Association), the AC Milan Centre, and Astra Sportsplex, Vaughan has the potential to attract and host soccer tournaments.

York Region already offers a variety of accommodation options, from camping and bed and breakfast stays, to more traditional hotels and motels. The 4,497 roofed guest rooms include well known chains such as Hilton, Best Western, Marriott, Radisson, Super 8, Sheraton, Comfort Inn, Holiday Inn, and Monte Carlo, providing a range of price points to suit travellers of all budgets. But few offer meeting facilities or convention and exhibit space, and what space is available is limited in size. Expansion of these facilities in size and number is necessary to take advantage of the growing business travel market.



York Region also boasts a significant number of dining options, reflecting a variety of multi-cultural experiences and featuring well known chefs.

The range of product is also evident in the Region's retail sector, which includes a variety of shopping centres, a number of specialty and boutique stores, galleries, antique and artisan shops, equestrian tack shops, and a range of farm markets.

Core attractions

- Canada's Wonderland – Canada's largest theme park (Vaughan)
- Richmond Hill Centre for the Performing Arts – York Region's largest cultural facility of its kind
- Vaughan Mills Shopping Centre – Canada's largest shopping centre (Vaughan)
- Pacific Mall – Canada's largest Asian shopping centre (Markham)
- Briars Resort, Spa and Conference Centre (Town of Georgina)
- Hilton Suites Conference Centre (Markham)

York Region's brand pillars

The Great Outdoors – Recreation and natural features

With hundreds of outdoor recreation options available, York Region offers visitors a wide variety of natural outdoor experiences and recreational activities, reflecting the Region's diverse and varied topography and natural beauty. With more than 27 conservation areas, the Oak Ridges Moraine, Rouge Park, three watersheds, 44 beaches, 60 golf courses, 29 birding and wildlife viewing locations, 19 ice fishing operations, and 2,070 hectares of Regional forests, York Region offers visitors miles of seasonal opportunities to hike, bike, cross country ski and snow shoe. The strength of the Region's access to nature and natural heritage provides unique opportunities.

York Region also has an extremely strong and diversified agricultural sector which contributes to and is supported by tourism.

Core features

- Kortright Centre for Conservation – voted 2005 Best Conservation Area by Parent Magazine (Vaughan)
- The Living City Campus – a unique approach to sustainability education (Vaughan)
- Angus Glen Golf Club and Conference Centre – site of 2004 and 2007 Canadian Open golf Championships (Markham)
- Oak Ridges Moraine
- Green Belt designation
- Lake Simcoe ice fishing – site of the World Ice Fishing Championship in 2003

Rich traditions – Cultural and heritage assets

With over 60 museums, galleries and interpretive centres and more than 125 performing arts festivals & events, York Region is rich in culture and heritage. From landmark heritage attractions like the Sharon Temple to the cultural significance of the McMichael Canadian Art Collection, the Region presents a rich historical landscape as well as a calendar of exciting and diverse visual and performing arts events, festivals, plays, concerts, galleries and exhibits. York Region presents a blend of engaging sightseeing and touring opportunities, from rural roads leading to quaint streetscapes and agricultural fairs, to city streets offering multi-cultural experiences, dining and shopping.

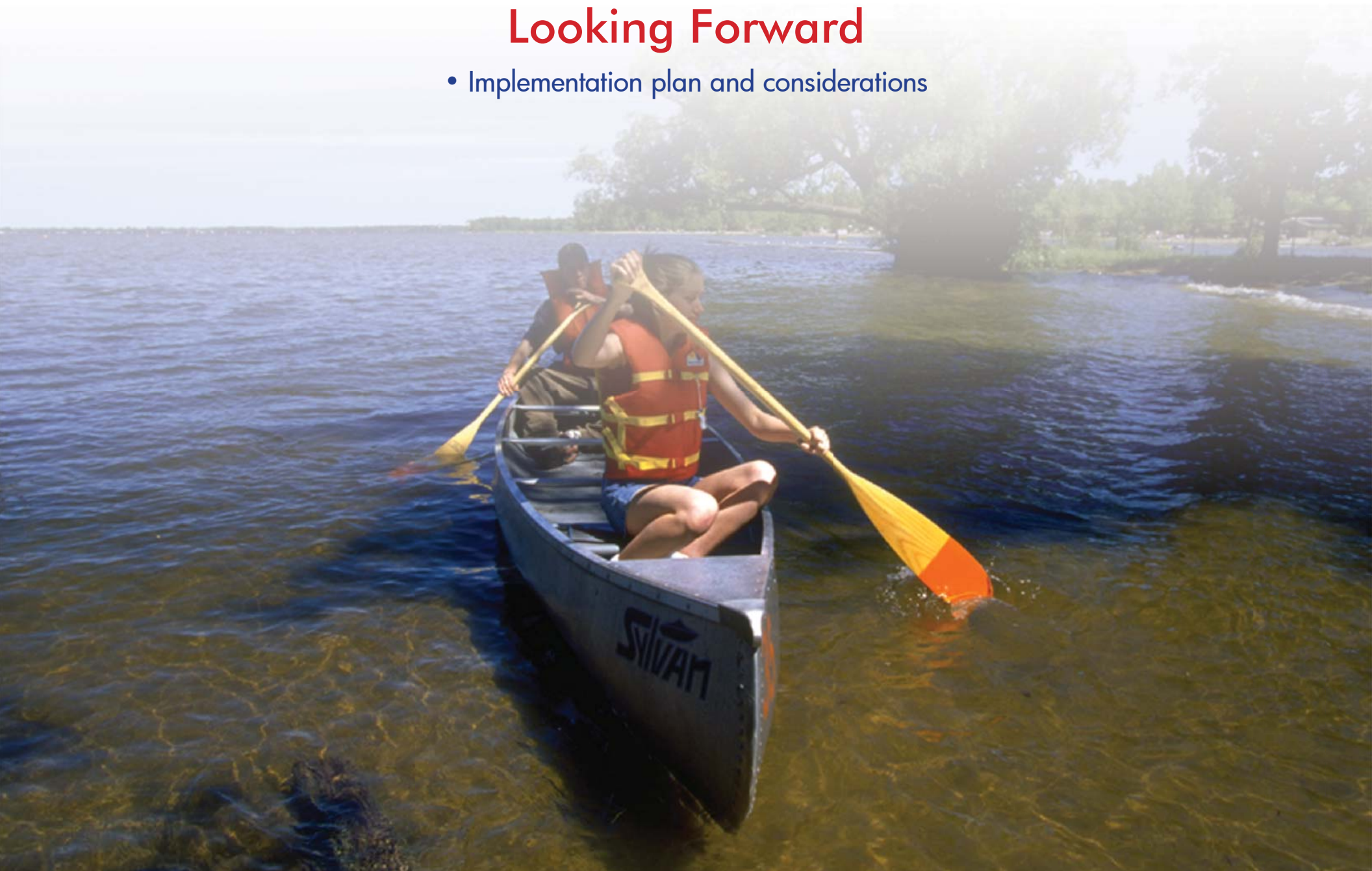
Core assets

- Sharon Temple – National Historic Site and Museum (East Gwillimbury)
- McMichael Canadian Art Collection – home to Canada's Group of Seven and over 6000 Canadian works of art (Vaughan)
- Festivals (e.g., Markham Jazz Festival, Eaglewood Folk Festival, , Markham Fair, Markham Rib Fest, Taste of Asia)
- Historic villages and features (e.g., Aurora, Unionville, Kleinburg, Markham, Schomberg)



Looking Forward

- Implementation plan and considerations



Looking Forward

Implementation plan and considerations, including stakeholder consultation, process and milestones

Stakeholder Consultation

Ensuring that tourism follows a sustainable path requires clear leadership from local authorities and an efficient mechanism that involves all of the stakeholders - the local private sector, non-government organizations, citizens, and other players. York Region's approach to date has emphasized collaboration and cooperation in identifying the community's goals for tourism and creating an action plan to achieve these goals. The York Region Tourism Advisory Group will play an integral role in monitoring the process, crafting the final recommendations and ensuring appropriate performance measures are in place to support the growth and long-term viability of tourism in York Region.

The following outlines the implementation process and milestones to date – refer to **attachment 2** for full details:

Situational Analysis	September 2007 – May 2008
Compilation of research	March 2008- July 2008
Regional Chair and CEO Review	September 2008
York Region Tourism Advisory Group Consultation	September 2008
Local Municipal Economic Development Offices	October 2008
Draft Report Planning Committee Regional Council	January 2009
Stakeholder Consultations	February – May 2009
Final Report Planning Committee Regional Council	September 2009

Process and Milestones

PKF Consulting, Advisors to Canada's Hospitality and Tourism Industry, and the University of Guelph, College of Management and Economics/School of Hospitality and Tourism Management have assisted in the research and compiling of the elements of the proposed long term tourism destination development strategy. The direction and action area outlined in this strategy document is the crucial first step in the continuation of a comprehensive consultation process to define the future of tourism in York Region. Consultations with stakeholders – internal to the Region, all levels of government (local Municipalities, Provincial Ministry of Tourism, Canadian Tourism Commission), tourism businesses, destination marketing partnership (Tourism Toronto, Ontario Tourism Marketing Partnership Corporation), conservation authorities, industry associations and academic institutions have occurred. Further consultation sessions proposed for January–March 2009 to review the validity and efficacy of the proposed actions to achieve the stated objectives, confirm their priority, establish roles and responsibilities and provide concrete implementation plans. During this strategy development, the Region prepared a submission to the Ontario Ministry of Tourism's competitiveness study lead by MPP Greg Sobara which released in February 2009. Alignment with the Provincial strategy will be incorporated to ensure that by the end of this process, there will be a unified voice, strong action plans and a strategic platform defined that will enhance the competitiveness of York Region's businesses and labour force, improve the quality of life and help ensure local municipality long term fiscal sustainability.

Looking forward



Looking Forward

Stimulating demand

Research will be used to determine the markets most likely to be attracted by York Region's experiences and to inform how best to reach these target markets. In addition, **information** on where to stay, what to see and do while in York Region **must be easily available** to both visitors – individuals, groups and corporate – and residents. The tourism website www.yorktourism.com is designed specifically to reach these audiences and should be enhanced to meet consumer needs.

Demand will be stimulated through expanded marketing and sales roles to:

- Convert same-day visitors to overnight stays;
- Increase Visiting Friend and Relative expenditures;
- Attract greater share of longer-haul visitors;
- Increase business meeting, conferences and sports tournament travel.

Enhanced marketing efforts will be implemented in partnership with other levels of government, non-governmental organizations and the private sector and focused on York Region's core attractors defined as the three brand experiential pillars of:

- Wonderful attractions;
- Great outdoors;
- Rich traditions.

Increasing supply

Increasing supply requires a **well-researched investment strategy** to attract private sector funding and enhanced public sector involvement or public/ private partnerships. Specifically, the accommodation across the Region needs to be increased to cater to a growing business market, but also demand from more overnight leisure stays. In addition, the limited capacity of the current meeting, sport and exhibit facilities needs to be addressed to grow the high yield meeting, convention and sports tournament business.

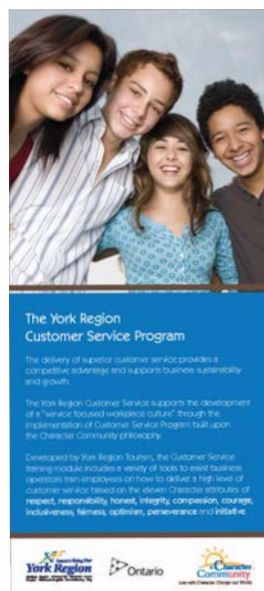
Reinforcing York Region's attraction base requires building on the identified core pillars and adding supporting elements to expand the experience. Attractors that lend themselves to forming the core of a cluster that would have stronger appeal to longer-haul markets and encourage overnight stays. The extent to which attractions are commercial in nature will determine whether the investment is primarily private, public or a combination. Building upon the strengths of existing tourism products should be considered when identifying development opportunities.



Dedicated to Service Excellence

Service quality must be a primary consideration if York Region wants to create and maintain a reputation for excellence. The Tourism Customer Service program currently in development is the first step to becoming recognized as a Region dedicated to service excellence. Building upon this program and so that owner operators, management and employees at all levels in public and private organizations complete workshops in customer service excellence programs, including understanding the unique needs of customers from foreign markets and disabled communities is key. Such an undertaking directly supports York Region's Vision 2026 guiding principles:

- customer-centered service;
- dignity, compassion and fairness;
- diversity; and quality.



Governance

Tourism governance is broadly defined by the structures and processes by which regional organizations are directed, controlled and held to account. **Successful tourism governance is characterized by high levels of collaboration and co-ordination among various agencies and political bodies.**

Public sector organizations manage billions of dollars and bear the responsibility of securing broader economic and social mandates. Taxpayers, as both the source and the beneficiaries of these mandates, expect public sector entities to be adequately governed and to be held to a higher standard of accountability. Accordingly, there is an increased need in the public sector for interdepartmental co-ordination regarding key tourism functions (e.g., policy, product development and industry development).

The current regional governance model consists of consultation with tourism stakeholders and leadership provided through the York Region Tourism Advisory Group. Further consideration in the establishing of a stronger regional comprehensive governance strategy that addresses the complexity of the tourism sector (i.e., multi-stakeholders), provides a coherent direction, ensures the optimal use of resources and creates a business climate for investment, expansion and enhancement of overall tourism economic development will be required going forward.

Refer to Appendix Table 4 for Samples of Governance Best Practices.



Looking Forward

Sustainable Funding

The **most difficult task** regional and municipal governments face in tourism development and marketing is **securing adequate funding**.

Currently, the regional marketing program is subsidized through industry advertising sales and a funding partnership with Tourism Toronto that expires at the end of 2009. A full review of options for varying levels and funding resources including federal appropriations, grants, surcharges, taxes, trust funds, and public-private partnerships will be undertaken to **develop a comprehensive regional funding strategy**.



Conventional funding mechanism

Traditionally, governments have funded broad-based image campaigns for their jurisdiction out of budget allocations. Similarly, investments in cultural and natural heritage as well as large facilities such as convention centres, have been made by the public sector. The private sector is responsible for the expenditures linked to the development and promotion of their own investments, such as hotels, resorts and commercial attractions. Increasingly, however, governments and businesses have come to realize that the alignment of private sector tactical initiatives with public sector awareness and image-building campaigns is crucial to penetrate the myriad of marketing messages by all types of destinations to which today's consumers are exposed.

Destination marketing fees

Destination Marketing Fees (DMF) are generally voluntary fees levied most often by accommodation properties. The funds raised are most often allocated to a Destination Marketing Organization and are used to support tourism marketing and sometimes development activities, such as funding support for events. Refer to Appendix Table 3 for details on Supplementary Room Tax/DMF on Lodging Properties in Canada and Potential DMF Revenue for York Region. However, it must be noted that the Ontario government announced move to a single harmonized sales tax with a provision for a DMF of \$40 million makes the addition of a local DMF a difficult decision for hotel operators and destination marketing organizations.

Tourism taxes

Hotel Taxes are a popular mechanism for generating marketing and development funds at the local and regional/provincial level in many countries. In Canada, a hotel tax is in place in British Columbia, Alberta, Manitoba, Quebec, Nova Scotia, Newfoundland and Prince Edward Island. Provincial or national legislation can enable the collection of a municipal and regional district tax on all forms of accommodation, including campgrounds. This is the case in France, for example. The State of Florida has opted to impose a fee on all car rentals to generate marketing funds.

York Region Long Term Tourism Destination Development Direction 2009-2019

- Goals, objectives and action plans
- Monitoring and accountability

To support York Region's vision for tourism, that is

- Economically viable, equitable and prosperous;
- Environmentally viable, livable and sustainable; and
- Socially and culturally rich, equitable and empowered,

The overarching goal will be to increase tourism's contribution to York Region's GDP from the current 0.4% to 1% by 2019 and to 2% over a 20 year horizon.



Goals, objectives and action plans

Goals, objectives and action plans

Crafting a long-term tourism destination strategy identifying clear actions for industry, clear roles for all levels of government and provides an innovative and forward-looking action plan is required to grow tourism and to fully realize the economic potential for local Municipalities. Presently the tourism role within the Planning and Development Services Department, Economic Strategy and Tourism Branch Region of York has as its fundamental purpose the effective and efficient stewardship of resources designed to promote York Region as a premiere destination of choice for leisure travellers, residents, and meetings and groups. To support destination development, growth and long-term viability of tourism in the Region, an expanded mandate and scope for York Region Tourism is recommended.

The following five directions provide a strategic framework to define and shape the environment in which tourism as a business will be conducted in York Region for a 10 year period 2009-2019:

1. **Strengthen Strategic Marketing**
2. **Expand Tourism Attractors**
3. **Leadership and Governance**
4. **Sustainable Funding**
5. **Product Sector Development**

For each of these strategic directions, a goal statement, a measurable objective and a set of actions to be undertaken to support successful achievement are provided.



Goal 1: Strengthen Strategic Marketing

Strengthen the image of York Region in the minds of consumers as a leading destination for getaways, visiting friends and relatives, meetings and groups, and sports tournaments.

Objective

Increase visitation and revenues by 13% per annum to 2019, so that tourism will grow from the current 0.4% of GDP to 1% by 2019.

Action plan

- Develop a compelling long term positioning that will create a unique “personality” for York Region’s tourism pillars
- Coordinate and expand Municipal and Regional destination marketing with Provincial marketing efforts
- Strengthen marketing through enhanced sales functions and activities
- Build broader strategic partnerships with York Region private sector tourism organizations to maximize marketing efforts
- Undertake new research initiatives to track changes in consumer awareness and trends and utilize existing consumer research to confirm marketing decisions
- Build stronger relationships with all levels of government and non traditional private sector partners to increase marketing resources
- Maximize immediate Greater Toronto Area visitation and increase the resources devoted to destination marketing to expand to new markets

Goal 2: Expand Tourism Attractors

Create visitor friendly communities, new tourism experiences and opportunities for additional tourism infrastructure investment.

Objective

To grow the tourism infrastructure, attractors and accommodation at a rate that is greater to increases in visitation to ensure needs of a rapidly growing local population are taken into account.

Action plan

- Work with existing tourism attractors to enhance, expand and evolve the quality and value of offerings
- Work with industry to expand awareness and usage of the natural heritage experiences by creating a multi stakeholder “access to nature” visitor information service
- Establish a task force to evaluate the establishment of an Oak Ridges Moraine Interpretative Centre.
- Identify new grant and funding programs
- Develop and enhance community-based support for tourism investment
- Identify prime opportunities for tourism investment and new capital sources and convince interested investors to capitalize on business opportunities in York Region
- Work with York Region’s and municipal departments, such as public transportation, transit, environmental services, health and planning and development services, to ensure that increases in visitation are integrated in the long-range regional and municipal master plans.

Goal 3: Leadership and Governance

Establish an organization with the infrastructure that supports marketing and creates a business climate for investment, expansion and enhancement of overall tourism economic development.

Objective

Design a York Region management and governance structure that provides leadership to realize the projected increases in visitation and revenues.

Action plan

- Leverage the expertise of the York Region Tourism Advisory Group through expanded scope, responsibilities and roles
- Develop recommendations for an expanded tourism management business model, including mission, values, goals, mandates, governance and resource requirements
- Increase awareness and profile of the value of tourism for its economic, social and cultural contributions
- Establish an internal steering committee comprised of Municipal and Regional Departments with a vested interest in tourism growth.



Goals, objectives and action plans

Goal 4: Sustainable Funding

To ensure that sufficient funding is in place to enhance new product and experiences, market the Region effectively to key market segments, and service the information needs of visitors and residents

Objective

To increase funding at annual rates consistent with the increases in projected revenues from tourism visitation (i.e., at a projected rate of 13% per annum)

Action plan

- Develop a 10-year tourism budget forecast for a regional tourism program including the share provided by York Region;
- Re-negotiate the current marketing partnership model with Tourism Toronto
- Investigate options that enable a more long term sustainable and inclusive Regional funding model for tourism development and marketing
- Negotiate with the Province for the establishment of a “new tourism zone” that includes York as well as Durham, Simcoe and Peel regions
- Develop a revenue generation plan including sponsorship, grants and advertising that includes provincial, regional, municipal, non-profit and private partners



Goal 5: Product Sector Development

To continually upgrade the quality and quantity of tourism attractors, products and packages, based on market research

Objective

To expand the capacity of existing tourism experiences to meet projected visitation increases.

Action plan

- Develop new and expanded tourism products and experiences based on consumer demand generators and research
- Become recognized as a Region dedicated to service excellence through labour development and training
- Develop and coordinate a capacity enhancement business development program based on identified opportunities
- Identify high profile festivals and events and evolution to provincial/national/international status
- Develop a strategy to bid on provincial and national level sports tournaments, meetings, conventions and other events, based on current and future capacities

Monitoring and accountability

The key to a successfully and sustainable tourism strategy is continuous monitoring and accountability. To accomplish this, realistic timelines and success measures must be identified and encouraged. Qualitative and quantitative indicators need to be held against predetermined criteria that benchmark the Region's performance on an annual basis. Instilling accountability will require full transparency. Public and private stakeholders must be updated regularly on progress made, indicators and issues as they pertain to the broader regional context. In doing so, all practical requirements will be identified, addressed and rearticulated when needed. This will encourage a unified front by which York Region

will be better positioned to monitor and govern the strategy's progress as a whole. The role of the York Region Tourism Advisory Group could be expanded to account for the monitoring and improvement of the strategy's progress. The Advisory Group would be charged with initiating a corporate dialogue with the private sector and have the authority to grant approval or adoption of relevant regional proposals. It is only through authority and responsibility that accountability can then be enforced. Once these factors align, York Region will have outlined the specific steps, outcomes and responsibilities, designated accountability, and governed the actions required for implementation.



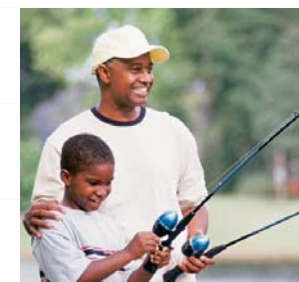
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Attachment 1 – Linkages to Vision 2026

Tourism Strategic Vision	Actions	York Region Vision 2026
<i>Economically viable, equitable and prosperous</i>	- Develop a brand positioning that will create a “personality” for York Region’s tourism pillars and inspire travel to York Region - Coordinate area Municipal and Regional destination marketing with Provincial marketing efforts - Build strategic partnerships with York Region private sector tourism organizations to maximize marketing efforts - Work with York Region’s municipal departments, such as public transportation, transit, health, environmental services and planning and development services to ensure that increases in visitation are integrated in the long range regional and municipal master plans - Expand the scope, responsibilities and role of the York Region Advisory Group beyond destination marketing - Develop recommendations for an expanded tourism management business model, including mission, values, goals, mandates, governance and resource requirements - Develop a 10–year tourism budget forecast for a regional tourism program including the share provided by York Region - Develop a revenue generation plan including sponsorship, grants and advertising that includes provincial, regional, municipal, non-profit and private partners - Investigate options that enable a more long-term sustainable and inclusive Regional funding model for tourism development and marketing - Re-negotiate the current marketing partnership model with Tourism Toronto	- Enhanced Environment, Heritage and Culture - A Vibrant Economy - Sustainable development
<i>Environmentally viable, livable and sustainable</i>	- Undertake new research initiatives to track changes in consumer awareness and trends and utilize existing consumer research to confirm marketing decisions - Build stronger relationships with all levels of government and non traditional private sector partners to increase marketing resources - Increase the resources devoted to destination marketing beyond the Greater Toronto Area - Work with existing tourism attractors to enhance, expand and evolve the quality and value of offerings - Identify development of new and expanded tourism products and experiences based on consumer demand generators and research - Work with the industry to expand awareness and usage of the natural heritage experiences by creating a multi stakeholder “access to nature” visitor information service - Establish a task force to evaluate the establishment of an Oak Ridges Moraine Interpretative Centre - Identify new grant and funding programs - Identify new capital resources and convince interested investors to capitalize on business opportunities in York Region - Develop and coordinate a capacity enhancement business development program based on identified opportunities - Identify high profile festivals and events that have the potential to evolve to provincial/national/international status - Develop a strategy to bid on provincial and national level sports tournaments, meetings, conventions and other events, based on current and future capacities	- Sustainable development - Managed and Balanced Growth - Infrastructure for Growing Region - Enhanced Environment, Heritage and Culture
<i>Socially and culturally rich, equitable and empowered</i>	- Increase private and public sector organizational commitment and participation in the Customer Service Program to become recognized as a Region dedicated to service excellence - Develop community-based support for tourism investment - Increase awareness and profile of the value of tourism for its economic, social and cultural contributions	- Healthy Communities - Enhanced environment, heritage and culture - Quality Communities for a Diverse Population - Responding to the Needs of Our Residents - Engaged Communities and A Responsive Region



Attachment 2 – Implementation Process and Milestone

Situational analysis and identification of opportunities	PKF Consulting Local municipalities Tourism stakeholders Business Community Chambers of Commerce and Board of Trade York Region Tourism Advisory Group	September 2007- May 2008
Compilation of research and strategic direction	University of Guelph	March 2008 - July 2008
Draft Strategy Presentation to Planning and Development Commissioner	Bryan Tuckey	August 20, 2008
Draft Strategy Presentation to Senior Planning Committee	Senior Planning Committee	September 2, 2008
Draft Strategy Presentation to York Region Tourism Advisory Group	Tourism Advisory Group	September 5, 2008
Draft Strategy Report to Planning and Economic Development and Regional Council	Planning and Economic Development Committee Regional Council	January 2009
Consultations on Draft Strategy to establish concrete implementation plans for Action Areas: • Strengthen Strategic Marketing-Tourism Branding Expand Tourism Attractors • Leadership and Governance • Sustainable Funding • Product Sector Development	PKF Consulting University of Guelph Internal to the Region, All levels of government (local Municipalities, Provincial Ministry of Tourism, Canadian Tourism Commission), Tourism Businesses Destination Marketing Partners (Tourism Toronto, Ontario Tourism Marketing Partnership) Industry Associations Academic Institutions	February – May 2009
Final Strategy Report to Planning and Economic Development Committee and Regional Council	Planning and Economic Development Committee Regional Council	September 2009



Appendix Table 3 – Supplementary Room Tax/DMF On Lodging Properties in Canada

City/Province	Rate	Notes
British Columbia	8%	1.65% of the 8% hotel room tax is dedicated to funding Tourism BC.
Chilliwack/North Vancouver/Oak Bay/Parksville/Prince Rupert/Qualicum Beach/Richmond/Rosland/Saanich/Smithers/ Surrey/Vancouver/Victoria/Whistler	1% or 2%	Additional to provincial tax; 100% of funds go to municipal or regional tourism marketing organizations
Alberta	4%	Tourism Levy Act
Calgary/Edmonton	1%	Additional to provincial tax
Saskatchewan		
Regina	2%	
Manitoba		
Winnipeg	2%	
Ontario	5%	
Toronto/Montreal/Ottawa/ Sault Ste. Marie/ Kingston/Kenora/Hamilton/St. Catharine's/ Burlington/Stratford/Dryden/The Village at Blue Mountain (Collingwood)/ Northwestern Ontario resource-based tourism operators	3%	voluntary
Quebec (except Montreal and Laval)	2%	
Montreal	3%	
Newfoundland		
St John's	2% + 1%	3% room tax: 2% funds the Avalon Visitors and Convention Bureau and 1% to bring down the debt on the Mile One Stadium and Convention Centre.
Prince Edward Island		
Charlottetown	2%	
New Brunswick		
Bathurst	1.5%	
Saint John	2%	
Nova Scotia		
Halifax	2%	levy for hotels with more than 20 rooms; 2/3 of funds raised go to the DMO and 1/3 used as a reserve for special events.
Potential DMF revenue for York Region Tourism		York Region could potentially generate \$2.5 -\$2.7 million for tourism marketing and development projects through the implementation of a Destination Marketing Fee.



Appendix Table 4. Sample of Governance Best Practices

Many regional bodies address this need by creating separate institutions such as boards, offices or agencies that pay particular attention to harmonizing marketing activities that match and leverage key tourism related strategies. For example, Tourism British Columbia formed a 15-member board of directors drawn from the public and private sectors, with management, financial and legal authority under the Tourism British Columbia Act. The board is accountable for policy direction and leadership whereas the CEO is charged with policy implementation.

Beyond good structure or adequate leadership, for tourism governance to succeed there must also be a clear rationale for its existence. Relationships between city centres and regional stakeholders must be relative to their degree of integration – that is, if the strategy equally emphasizes the various economic centres throughout the region then said centres should have equal cause and authority. Best practices in tourism governance have low regulatory structures (i.e., little or no red tape and no overlap between line ministries and crown corporations), and transparent motives. The United Nations World Tourism Organization (UNWTO) has developed rigorous certification of excellence in tourism governance, providing benchmarking examples of tourism governance institutions at the local, regional, and national level. Some organizations of relevance to York Region include:

- **KwaZulu-Natal (South Africa)** – focuses on the impacts of tourism and on tourism as a tool for development. The organization involves the local community, strives for excellence in service and devotes a large part of its daily work to development, research and communication activities to keep attracting and satisfying visitors and local residents.
- **Blackstone River Valley (Rhode Island, USA)** – creates a positive change in community values and developing and promoting coordinated, responsible and sustainable tourism in the nine communities which are part of the first recognized National Heritage Corridor. By encouraging this kind of tourism, the Council was able to ensure the socio-cultural values, historic heritage and the natural environment.
- **San Martin de los Andes (Argentina)** – stresses close cooperation with local stakeholders in the community that have invested in promoting tourism development with the help of the private sector. One of the main contributions to the achievement of this certification is the implementation of a strategic plan that emphasizes the focus on policies for sustainable tourism. Under this strategy, accessibility and nature preservation have become central issues.
- **Cancun (Mexico)** – best practice: good relations with stakeholders, as well as the competent supervision of financial resources and infrastructure. In addition, there has been a large investment in human capital, with specialized training courses together with universities and other renowned institutions.

For each of the above examples, the board of directors plays a central part in the governance strategy. The general role of the board is to cultivate the organization's short and long-term success. The board is accountable for the design and implementation of tourism strategy that is consistent with the organization's mandate and objectives. When discharging its responsibilities, the board oversees the affairs of the organization, supervises management through the chief executive officer, and sets standards for organizational conduct.





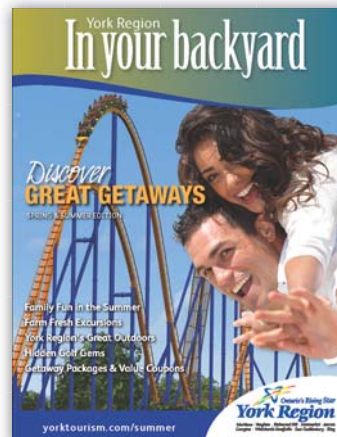
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