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Regional Tourism Organization 7 (RTO7) in partnership with the Municipality of Northern Bruce Peninsula, the County of Bruce, Parks Canada, and the Bruce Peninsula Environment Group has commissioned Twenty 31 Consulting to undertake a Sustainable Tourism Management Action Plan for the Municipality of Northern Bruce Peninsula, to ensure the tourism sector contributes positively to the social, cultural, environmental, and economic well-being of the community and throughout the region.

The information and data found in this report are current as of the date of submission to RTO7 and subject to change given market forces and external variables.

June, 2018

Please note that some changes have been made by the project Steering Committee to the original report provided by Twenty31 to reflect evolving local circumstances/understanding.

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Executive Summary

The following document outlines the findings of a detailed review of Northern Bruce Peninsula's current tourism environment and proposes a series of recommendations for consideration governing the sustainable management of tourism from 2018 to 2022. The document provides options grounded in best-practice in other jurisdictions, but recognizes the myriad stakeholders in Northern Bruce Peninsula (NBP) will need to adopt elements of this plan that work within the unique community, government and political structures.

NBPis at a cross-roads, the last three years has seen a dramatic increase in the number of tourists visiting a relatively limited number of tourism sites. In turn these sites have faced overcrowding and Community infrastructure is overburdened and there is a perception that the economic benefits of tourism to the community are limited vs. the volume of tourists visiting. It has been observed by residents as well as businesses servicing the tourism industry that not all of this increased growth has resulted in a net economic and social benefit for the NBPcommunity.

Two likely options now exist:

- Continue as is with no cohesive tourism management and development plan (i.e., status quo), likely resulting in further unmitigated growth and environmental and social pressures; or
- Galvanize as a community and effectively take control of management and experience development of tourism (i.e. implementing aspects of this plan).

In the absence of any action and a continuation of the status quo, NBPwill have limited ability to stem the negative environmental and social effects of rampant tourism growth. NBPno longer has the luxury of inaction. However, with adoption of a more structured and collaborative approach to tourism management and experience development, NBPhas a great potential:

- · Slow visitor arrivals in high season and build out visitation in shoulder seasons
- Transition a majority of tourism from a limited number of overburdened tourism sites and better disperse visitors throughout the region
- Shift away from a mass-tourism and likely lower-value tourist model to high-value tourists willing to spend more, stay longer and that are more committed to sustainable tourism behaviour

For these benefits to be realised, at minimum the stakeholders engaged in and impacted by the tourism industry in NBPneed to agree on the direction to move forward as well as have one or more champions to coordinate efforts. Tourism rarely develops in a sustainable fashion via organic means and therefore best practice often cites the importance of a strong leadership role by the municipal government. In this circumstance, a collaborative approach where leadership is a shared responsibility among key cooperating organizations is proposed.

Executive Summary, cont'd

The sustainable tourism management plan will be governed by one overarching objective - for Northern Bruce Peninsula to manage tourism which encourages economic, social and environmental sustainability within the region. Over the three-year plan implementation period, it is essential that the tourism leadership clearly and consistently focus professional efforts, resources and budget to achieving this objective.

Prior to adoption and implementation of the three-year plan, it is recommended that the tourism leadership undertake a series of structural changes to set up the 'right' conditions to effectively manage tourism within Northern Bruce Peninsula. These changes focus on the leadership and governance 'infrastructure' for the systematic management of tourism within NBP. While rather 'simplistic' – these are the core recommendations that will ensure a solid leadership, management and governance base and ensure effective tourism management in NBPvia a professional process. The four main structural changes and rationale for adoption are included within this document including a timeframe to review, modify and possibly adopteach.

The structural changes include:

- 1. Set up and formulation of the Tourism Advisory Group (TAG).
- 2. Empowerment of the TAG with a Terms of Reference (TOR).
- Development of a job description and retaining a dedicated Tourism Manager (title TBC).
- 4. Securing funding for the Tourism Manager and initiatives outlined in the plan

The proposed Tourism Advisory Group will include representatives from key stakeholder groups and advise on and be responsible for implementation of aspects of this plan. However, best-practice also points to the need for dedicated staff resources and confirmed budget to coordinate and enact the needed initiatives to guide, nurture and manage tourism leading to a more sustainable tourism offering. In the absence of a dedicated tourism manager as well as an associated annual budget, the proposed Tourism Advisory Group will have limited ability to effect change and realise a more sustainable tourism offering in NBP. Sustainable tourism management requires leadership, active management and investment.

Akey first step once this plan is delivered to the Steering Committee will be further discussion and agreement on the role of the municipality and other stakeholder groups around sustainable tourism management in NBP. In tandem the plan also includes a number of 'quick win' initiatives to be implemented by the TAG.

Executive Summary, cont'd

Following adoption of the structural changes, the plan outlines four main medium-term to long-term strategic pillars and associated tactics designed to work in tandemincluding:

- Strategy 1: Community and Industry Engagement: This pillar is designed to effectively communicate the direction, management and performance measurement of the tourism plan with all key stakeholders in NBP.
- Strategy 2: Product and Experience Development: This pillar is designed to refine and develop NBP's product and experiences
 offerings including in shoulder seasons and new areas as well as build capacity with local operators to deliver tourism experiences.
- Strategy 3: Investment and Asset Development: This pillar is designed to secure stable funding for the plan initiatives as well as manage existing tourism infrastructure and develop new tourism assets.
- Strategy 4: Sustainability Positioning and Destination Branding: This pillar is focused on the promotion, marketing and communication (to consumers and the travel trade) of Northern Bruce Peninsula's tourism brand experience.

Finally, this plan and the various recommendations will likely need to be adapted and modified on an on-going basis to ensure relevance and applicability as the tourism industry evolves and the key stakeholder groups interact. Sound sustainable tourism management plans are living documents with measureable outcomes.



Project Background

Tourism is one of the fastest growing economic sectors globally with tourism visitation exceeding 1 Billion travellers in 2012 (UNWTO). However, this rapid growth may contribute to climate change, economic leakage, and negative impacts on resource management and local communities and cultural assets ¹

During the course of the last five years, tourism in Northern Bruce Peninsula (NBP), like that of Ontario overall, has grown much more quickly than in the past decade. The popularity of both Bruce Peninsula and Fathom Five Marine National Parks, the private sector operators and the natural attributes, have strained both the physical and human infrastructure in and around the Parks, the Village of Tobermory, Lion's Head and the region. The ever-increasing desire of newcomers to experience Ontario's out-of-doors and the widespread awareness of the region via social media have culminated in the need for a Sustainable Tourism Management Action Plan for Northern Bruce Peninsula.

This trend will only continue as Canada, Ontario and key regions in and around the Greater Toronto Area (GTA) experience record growth levels (i.e., from domestic, USand international travellers) and compression for tourism assets in the busy summer months. While this does present opportunities for areas outside of the GTA, especially for NBP, sustainability challenges are paramount both in terms of impact on human resources, and environmental, social, cultural, and tourism assets. Awell-developed three-year management plan for NBP must adhere to a triple bottom line approach: people, planet and profit.

Successful tourism destinations are built and managed in collaboration with private and public sector input and support, designed to achieve sustainable development that respects the environment, the residents and the business community collectively. This plan has been designed to identify and confirm key issues and concerns regarding negative impacts of over-tourism in the region through engagement with the joint steering committee, key stakeholder interviews, desk research, competitive reviews, site visits, a stakeholder workshop, and an online survey. Integral to this plan is the development of a regional Visitor Management Framework (VMF) designed to align the activities of partner organizations and tourism operators in the region with a focus on activating priority strategies, tactics, and impact measurement criteria.

Project communications have been undertaken by RTO7 (Regional Tourism Organization 7) and partners to create awareness of the project and this process. This Sustainable Tourism Management Action Plan had been developed under the guidance and in collaboration with key stakeholder partners, including Regional Tourism Organization 7 (RTO7), the Municipality of Northern Bruce Peninsula, the County of Bruce, Parks Canada, the Bruce Peninsula Environment Group (BPEG), the Saugeen Ojibway Nation and the St. Edmund's Property Owners.

Overview of Approach and Methodology

Our approach to this plan has been based on a careful review of the project, stakeholder, community, and industry requirements layered with incorporating successful processes we have deployed in similar projects. Our methodology is rooted in the following principles*:

- 1. Aclear vision for the Northern Bruce Peninsula for Sustainable Tourism Management. The plan is designed to deliver a widely-embraced, co-created picture of success through key stakeholder alignment and focus over the long-term.
- 2. Strategy-driven priorities. Based on objective and credible analysis, the plan identifies a prioritized portfolio of strategies that will guide decisions of key stakeholders and partners in activating this plan.
- 3. Engaging with multiple perspectives. The plan goes beyond traditional industry stakeholders and includes the local residents as well as key client groups. Acritical component has been generating engagement from as broad a perspective as possible in helping to identify what is important.
- 4. Actionable recommendations. The key to any successful strategy is a well-considered implementation plan that is realistic while responding to the longer-term vision, mission and strategies to help the Joint Steering Committee achieve their objectives. More specifically, we have developed a Visitor Management Framework (VMF) with associated criteria which may be applied to the asset inventory.

Methodology

Our work to date includes implementation of our Phase 1, Phase 2, and Phase 3 approaches:

Phase 1: Discovery

Confirm buy-in to project and obtain alignment on outcomes; conduct full scan and systematic analysis of all background materials and a competitive destination audit.

Phase 2: Engagement

Engage stakeholders to assess opinions, attitudes; survey the full spectrum of tourism, business, community association and government stakeholders in Northern Bruce Peninsula.

Phase 3: Assessment

Conduct detailed analysis of all HR, economic, investment, trade, product development and marketing issues; develop Visitor Management Framework; refinement of themes into key pillars with associated strategies, tactics and impact measurement criteria.

Phase 4: Activation

Develop final strategy and action plan; conduct briefing session with key stakeholders; communicate and secure buy in of strategy with stakeholders in Northern Bruce Peninsula – and check in on the Steering Committee at the 3 and 6 month marks to ensure progress.

The development of this plan is based on guidance and feedback from the Steering Committee, desk research (literature reviews)*, in-market site visits, an in-person workshop and consultations, and validation of the Phase 2 Report and Phase 3 Assessment activities, per the following:

- An in-person project launch meeting on October 18th at the Bruce Peninsula Environmental Group Meeting
- 11 in-depth steering committee interviews
- 7 in-person consultations on October 23rd and 24th with Parks Canada, the Tobermory Chamber of Commerce, the Bruce Peninsula Environmental Group, Bruce County, Lion's Head, and the Saugeen Ojibway First Nation
- 98 responses from the stakeholder survey
- 17 in-depth tourism stakeholder and private citizen interviews
- An in-person workshop on Nov 17th with 18 attendees and 3 facilitators
- Production of the Phase 2 Engagement Report December 11, 2017
- Phase 3 Destination Assessment activities.

^{*}The Supporting Documentation section provides a more detailed list of documentation reviewed.



Sustainable Tourism Vision for the Northern Bruce Peninsula

Vision: Northern Bruce Peninsula

Key Stakeholders, including our Saugeen Ojibway First Nation, partners of the Northern Bruce Peninsula, envision a future where tourism is managed and developed to the benefit of the entire community. Community benefits will be realized when development is guided by plans that:

- · Mitigate negative impacts
- Promote conservation of natural, cultural and heritage assets
- · Maintain and enhance quality of lifestyle for local residents
- Encourage sustainable tourism investment and provide dividends for tourism operators
- · Support employment opportunities
- Encourage amenity migration (visitation, then relocation)
- · Attract desirable types and behaviours of visitors, and
- · Inform, educate and facilitate appreciation of these values from visitors

Opportunity for Northern Bruce Peninsula

The below highlights key pillars that have been revealed throughout the project as themes to pave the way for sustainable, valuable and long-term tourism evolution within NBP. These pillars are the foundation of this action plan.

Key Pillars:

- · Community & Industry Engagement
- Product & Experience Development
- Investment & Asset Development
- · Sustainability Positioning & Destination Branding

Collaboration Is Key

The development of **collaborative strategy and policy** for the balanced access and use of public lands for tourism activity provides complex challenges to effectively address the interests of diverse stakeholders and visitors. "Canada is (one of) the...most popular tourist destinations in the world, and many visitors come to experience the country's diverse ecosystems and the plants and animals found in them. This provides powerful socio-economic incentives to maintain, and where possible, enhance plant and animal populations and habitats through job creation and capital investment."

1 Grey, P., Duwors, E., Villeneuve, M. Boyd, S., and Legg, D., (2003) The Socioeconomic Significance of Nature-Based Recreation in Canada, Environmental Monitoring and Assessment, 86: 129–147



What is Sustainable Tourism?

"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". - UNWTO1

Environmental



Economic

Follow the Leaders

"Sustainable tourism actively fosters appreciation and stewardship of the natural, cultural and historic resources and special places by local residents, the tourism industry, governments and visitors. It is tourism which is viable over the long term because it results in a net benefit for the social-cultural, economic, and natural environments of the area in which it takes place." - Adapted from Tourism Industry Association of Canada and Parks Canada

Trends in Sustainable Tourism

As global tourism continues to grow, there has been a dramatic change in awareness of the impacts, issues, driving regulatory/legislative measures, growth in market expectations, and more sustainable tourism practices. The need for sustainable/responsible planning and management is imperative for the industry to survive as a whole. Some growing trending practices addressing sustainable tourism globally include:

- Implementing Visitor Management Strategies
- Adhering to and/or implementing sustainable tourism criteria and/or certifications (for an operator and/or a destination)
- Development of adventure based tourism assets (defined as assets and experiences incorporating physical activity, cultural immersion, and natural environment)
- Promotion of unique, authentic and lesser known tourism assets (i.e., Destination Canada's Northstar 2022; Saskatchewanderer)
- Enhanced operator and visitor education, awareness and involvement of the region via interpretive assets and sustainable pledges
- Alternative transportation development including shuttle systems and bike rental programs

Why Engage in Sustainable Tourism?

The Bruce Peninsula has become a premier Canadian travel destination, recognized as a "natural retreat" within close proximity to Canada's most densely populated region. In 2009, the Grotto area in Bruce Peninsula National Park was ranked #1 in the Canadian Tourism Commission's Locals Know Campaign, a national advertising campaign to encourage domestic tourism in which Canadians vote using social media on their favourite places. In 2016 the town of Tobermory was also ranked as #4 "Most Popular Vacation Rental Spots in Canada" behind Toronto, Vancouver and Montreal on TripAdvisor's Vacation Rentals blog.

As a result of its higher profile, the Bruce Peninsula has seen a significant increase in visitation by tourists seeking nature-based opportunities over the past decade. Based on visitor statistics at Bruce Peninsula National Park, there has been more than a 100% increase in visitation from 194,000 person visits in 2008 to 400,000 person visits in 2016. In 2016, over 140,000 visitors came to the Grotto, while over 160,000 visitors were turned away due to capacity issues. Although this increase demonstrates the demand for nature-based tourism in the region, it is becoming increasingly evident that **the current tourism model cannot accommodate this demand without compromising the ecological integrity of these areas, visitors' experiences, and local infrastructure throughout the region.**

In response to these dramatic changes, several local initiatives have begun to explore options for managing increased visitation (e.g., spatial and temporal redistribution, infrastructure improvements, niche marketing, value-added products and packages, and coordination and integration among partners). It is an opportune and critical time to reposition tourism on the Bruce Peninsula.

People generally come to the Bruce Peninsula to see two landmark attractions, the Grotto and Flowerpot Island, however, they are often unaware of other attractions throughout the region. Furthermore, visitors often do not have the opportunities to learn about the ecological significance of the region's natural features or the captivating stories of the local culture. There is an opportunity to offer niche products that would attract a different segment of the tourism market - those wanting an in-depth experience that enables them to learn about the ecological and cultural significance of the Bruce Peninsula while participating in fun, guided adventures.

In response to recent visitor and local demand, NBP must engage in strategic sustainable tourism in order to:

- Protect the environment
- Improve resident's way of life
- · Maintain and enhance the business culture
- Maintain and enhance the destination's reputation
- · Realize cost savings
- · Adhere to the importance of responsible travel

The Risks of Unmanaged Tourism

Tourism can bring many positive benefits to NBP. However, with out proactive planning, monitoring and management, it can also bring undesirable impacts for the region. It is evident that NBP is already facing some of these undesirable impacts. As disruptive as these impacts currently are, the potential for even greater damage is high. By leaving the tourism growth unmanaged, the negative impacts to the peninsula's environment, social well-being, cultures and the quality of the visitor experience will vastly increase. Disparaging effects will likely include:

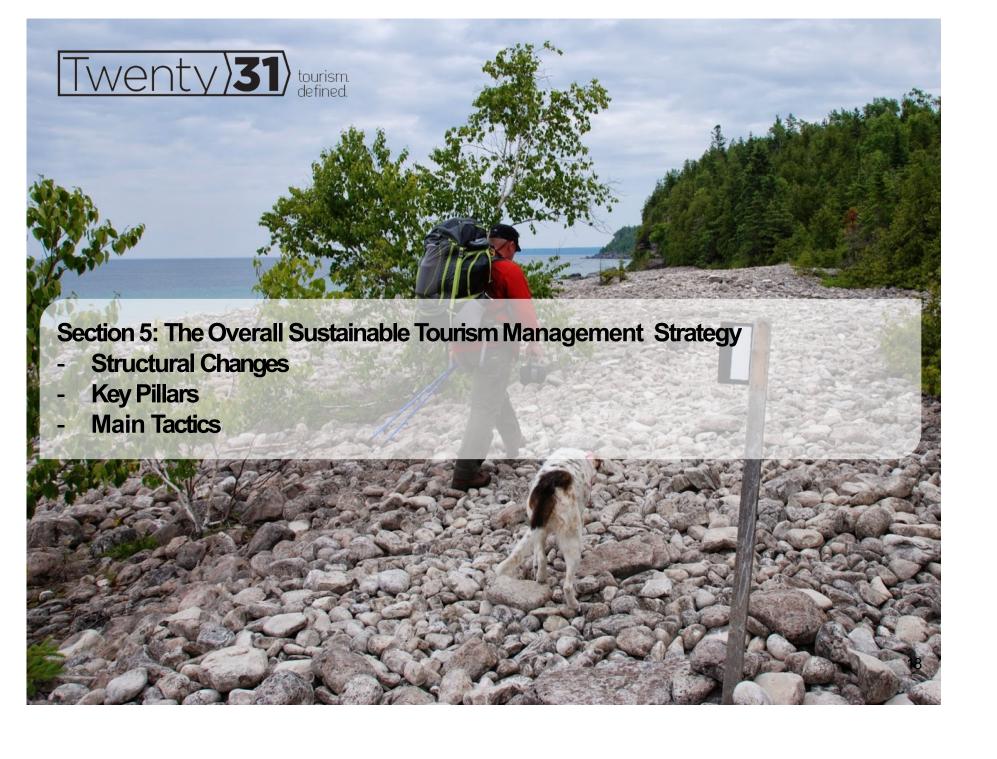
- The social license and willingness of local residents to support tourism may begin to decline. As this happens, the political support for advancing tourism could wane and so too will associated funding and resources necessary to provide quality visitor experiences and market the region.
- Negative visitor experiences. Visitors who arrive in the destination may be met with less inviting hosts and opportunities which will
 negatively influence the visitor experience, the brand of the region and the likelihood of return visitors and / or word of mouth
 marketing.
- User conflicts of public lands. Multiple stakeholder groups who participate in non-complementary activities in regions where changes and growth in tourism occur have conflicting interests for the use of public lands. Without proactive initiative and collaboration, unmanaged recreation presents a challenge to public land managers because it is shrouded in radical uncertainty, which results from disagreement over the definition of the problem, the strategies for resolution, and the outcomes of management. Public lands management, by tradition and statute, has emphasized multiple uses. Many of these uses are complementary, often; however, other uses for which public lands are managed are directly competing, such as land development and resource extraction.
- Complexities in land management. The development of policy frameworks for the balanced access and use of public lands for
 commercial tourism provides complex challenges to effectively address the interests of key stakeholder groups. During the process
 of researching the literature for this project, relevant subjects were identified for consideration, including: the identification of
 issues which contribute to potential user conflicts, evolving community attitudes and societal values regarding the perception and
 importance of nature amenities, and availability and allocation of strategies and resources to effectively manage and support
 stakeholder group interactions.

Managing the Risks of Tourism

The Value of Nature-Based Assets: Nature amenities provide numerous benefits to outdoor recreation participants and tourists and those in the tourism industry who facilitate and provide opportunities for those groups. This symbiotic relationship therefore supports the needs of commercial outdoor recreation interests in addition to the general public. Canada is the seventh most popular tourist destination in the world, and many visitors come to experience the country's diverse ecosystems and the plants and animals found in them. This provides powerful socio-economic incentives to maintain, and where possible, enhance plant and animal populations and habitats through job creation and capital investment. As more natural areas across the globe diminish or disappear, the parks of NBPwill increase in social value.

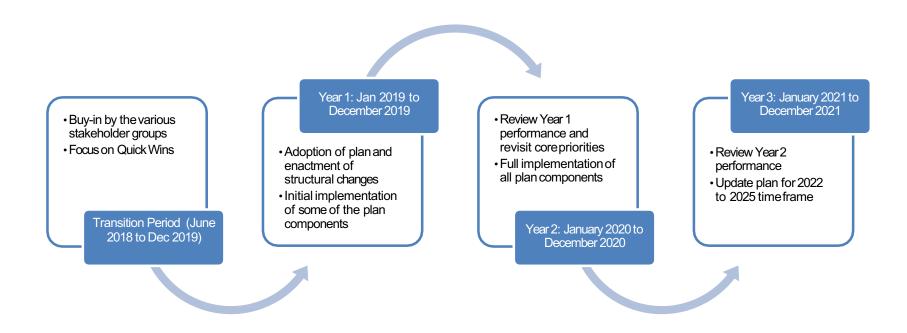
Community Values: To incorporate society's social needs, public lands management must plan for a suite of often competing social, economic and ecological values at large scales. These social needs and values encompass: cultural and social identity and awareness values, psychological values, educational values, scientific values, economic values, subsistence values, existence or vicarious values. Even though some Canadians spend little time in nature, they take pleasure and comfort in knowing that it exists, and option or future values. It is important to acknowledge the growing importance of tourism, outdoor recreation and wilderness as holding complex values and intertwined importance to Canadians and public land managers.

Managing Visitation: To effectively facilitate positive interactions between disparate stakeholder groups, land managers may select strategies from a tool-kit of considerations and practices that have been revealed in this research. The Visitor Management Framework section provides guidance on mitigating unmanaged tourism impacts.



The Business Objective

- The sustainable tourism management plan will be governed by one overarching objective for Northern Bruce Peninsula to manage and develop tourism which encourages economic, social and environmental sustainability within the region.
- Over the three-year plan implementation period, it is essential that the tourism leadership clearly and consistently focus professional efforts, resources and budget to achieving this objective.
- The plan will have the following time schedule:



Initial Recommendations

Prior to adoption and implementation of the three-year plan, it is recommended that the tourism leadership undertake a series of structural changes to set up the 'right' conditions to effectively manage tourism within Northern Bruce Peninsula. These changes focus on the leadership and governance 'infrastructure' for the systematic management of tourism within NBP. While rather 'simplistic' – these are the core recommendations that will ensure a solid leadership, management and governance base and ensure effective tourism management in NBP via a professional process. The following table outlines four main structural changes and rationale for adoption. The timeframe to review, modify and possibly adopt each of these would be from January 2019 to December 2019.

Proposed Structural Change	Description	Rationale
1. Form a Tourism Advisory Group	 The Tourism Advisory Group (TAG – name TBC) should include representatives of key stakeholder organizations engaged in tourism in NBP The TAG would be responsible for the guidance and accountability of the sustainable tourism management plan during the three-year implementation period. We recommend the Steering Committee draft a 'job description' for TAG members and selection criteria governing their responsibilities and three- year commitment. The TAG would differ from the existing Economic Development Committee in that it would be exclusively focused on tourism management. 	should be community led, market driven and research based. Membership should be broad enough to ensure a diversity of ideas and viewpoints ensuring the sustainable tourism management plan is actioned and implemented. It will be important for individuals to be active, contributing members, willing to bring energy and enthusiasm to the portfolio. They would act as the voice of the tourism industry in NBP and help direct the efforts of the proposed tourism manager. The TAG would be separate from the municipal government but should likely be recognized by council as the lead tourism advisory group.

Proposed Structural Change	Description	Rationale
Empower the TAG through a Terms of Reference (TOR).	 The TAG would be responsible for drafting a Tems of Reference (TOR) outlining their role and responsibility as the guiding organization of the sustainable tourism management plan. Lines of communication and engagement with the Municipality of NBP including the proposed Tourism Manager should be clearly defined. The TAG's main objective would be the active oversight of the sustainable tourism management plan and providing strategic direction to the Tourism Managerand conducting an annual performance review. During the Transition Period meetings should likely be monthly and then quarterly during Year 1 to 3. Hosting/funding/oversight for the Tourism Manager role should be determined by the TAG, and could be a shared authority model, between (for example) the Municipality, Parks Canada, the County and potentially SON. The TOR could outline responsibilities of each of the parties within a shared responsibility model. 	 A TOR will ensure accountability, while ensuring flexibility and the continued input into tourism management of the main and material stakeholder groups in NBP Note that the municipality has made no commitment to date to engage an individual with dedicated tourism hours

Proposed Structural Change	Description	Rationale
3. Develop a job description and retain a Tourism Manager	 It is recommended that the TAG have the opportunity to co-create a job description with the funding partners. A positive working relationship between the TAG and the Tourism Manager (and provision of strategic guidance and support to the position) will go a long way to ensuring a successful implementation of the sustainable tourism management plan. 	 Well managed tourism in both Ontario and Canada needs both leadership and the required administrative infrastructure. There exist jointly directed/funded models where a platform for future long-term collaboration (beyond the tourism portfolio) is key (e.g. Kipawa Tourism) A dedicated Tourism Manager (i.e. initially dedicated to tourism two or three days per week) will ensure NBP can effectively action and implement the recommendations in this plan Depending on the funding of this position (see below), the location and focus could rotate between a series of stakeholder offices (e.g. the Municipality, Parks Canada, SON, etc.) Ideally this individual will fulfil a strategic role with relevant experience and skills in project and tourism management as well as communications.

Proposed Structural Change	Description	Rationale
Secure funding for the Tourism Manager and tourism management initiatives outlined in the plan Secure funding for the Tourism Manager and tourism management initiatives outlined in the plan	 Funding the Tourism Manager (as well as providing the logistical and administrative support) could come from a number of organizations/sources, potentially including the municipality, Parks Canada, SON, the County, etc. In addition, the initiatives outlined in this plan will need funding. This may come from a variety of sources including: The municipality – while the municipality's paid parking revenues have reportedly been committed for property purchases and parking lot construction, it is recommended that this be further discussed/revisited, and that a portion of these fees could go towards funding tourism operating costs going forward. Parks Canada – for specific purposes/projects The Chamber of Commerce – has in past discussed a possible/future Visitor Amenity Fee Bruce County – operates the Spruce the Bruce program with potential funding opportunities RTO7 – operates the Partnership Program and several other funding programs with project-specific potential 	Tourism can rarely develop organically and must be funded to ensure effective product and experience development, the attraction of appropriate investment and communication.

Proposed Structural Change	Description	Rationale
4. Secure funding for the Tourism Manager and initiatives outlined in the plan (cont'd)	It is recommended that consideration be given by the municipality to the newly (November 2017) introduced Municipal Accommodation Tax. This is an opportunity to generate revenue that is currently being evaluated by a number of Region 7 municipalities. Under this tax on accommodations (details largely determined by the municipality in question), aminimum of 50% of monies collected must go to a non-profit tourism organization (could bea DMO, the Chamber, the RTO, etc.) who will administer it for project-related (not operating) purposes. See TIAO's Q&A for more information.	 To date (May 2018) 17 municipalities have chosen to enact the tax, whichis a user (meaning visitor) pay approach This plan (and the initiatives outlined therein) align well with criteriasought in provincial funding programs Note that in addition to funding specific projects/initiatives, both MTCS and OMAFRA confirmed in person that these funding programs provide for the possibility of funding of personnel for project-specific purposes (i.e. implementation of this plan) In conversation with MTCS, it was madeclear that project lead is less important than that all partners are aligned and have a signed MOU or something to that effect guiding the collaboration

Proposed Structural Change	Description	Rationale
4. Secure funding for the Tourism Manager and initiatives outlined in the plan (cont'd)	 Other provincial funding programs: Ministry of Tourism, Culture & Sport's Tourism Development Fund provides project based funding to innovative/emerging tourism product, to build industry capacity and encourage/attractourism investment (including hiring of a coordinator to guide the implementation of the sustainable tourism plan) – requires applicant partner alignment and application contribution of at least 20% of project costs/partner contribution of at least 50% of project costs (can include funds from other programs). Ontario Ministry of Agriculture, Food & Rural Affairs' Rural Economic Development (RED) program provides up to 50% (to a maximum of \$100,000) project-based funding – including wages for new hires – and program objectives align well with those of the sustainability plan. Other sample funding initiatives – The Travel Oregon Fund – provides residents and visitors to Oregon an opportunity to give back to projects that make Oregon a better place to live and travel. Business partners include donations into the total cost of products and services at point of sale, or they make an annual donation based on a percentage of total sales. 	confirmed in person that these funding programs provide for the possibility of funding of personnel for project-specific purposes (i.e. implementation of this plan). In conversation with MTCS, it was made clear that project lead is less important than that all partners are aligned and have a signed MOU or something to that effect guiding the collaboration.

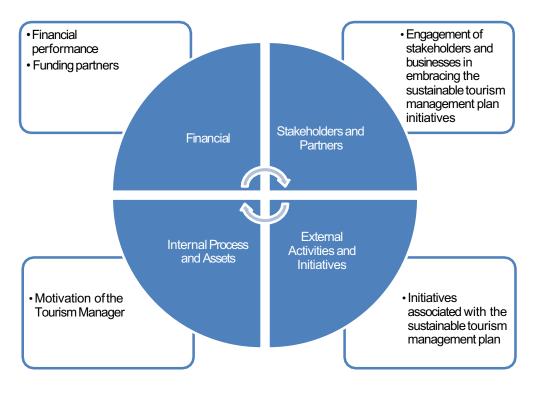
Managing Progress of the Sustainable Tourism Management Plan

• While a majority of Fortune 500 companies including most airlines and hotel groups have adopted a performance based management culture with the use of a scorecard, most industry associations and DMOs have not embraced this management tool. That said, the TAG should adopt a performance based management culture and make use of a scorecard in order to better gauge whether the sustainable tourism management plan activities achieve their desired outcomes.

<u>Recommendation</u>: The sustainable tourism management plan should roll up to a performance-based management framework whereby each pillar will have a set of objectives (1. outputs and 2. outcomes) to achieve each year with a quarterly and annual report back.

Managing Progress of the Sustainable Tourism Management Plan, cont'd

- This need not be an onerous framework and should be designed around a simple scorecard linked back to the overall mandate of the TAG (i.e., effectively guiding the sustainable management of tourism in NBP).
- The scorecard measures performance indicators across four perspectives (which can be modified and tailored by the TAG). An example is provided below:



Scorecards are purposely complex, but manageable:

- They ensure alignment exists between: financial, human, operations aspects and the vision, mission of an organization
- Scorecards require soul searching:
 - Who is our primary customer?
 - What resources do we use?
 - Are we effectively delivering on the direction of the sustainable tourism management plan?
 - Are we building a more sustainable tourism industry in NBP?

Managing Progress of the Sustainable Tourism Management Plan, cont'd

- Mission based organizations, such as the TAG, use scorecards because they can be developed to help track success against diverse and sometimes intangible goals including:
 - To educate tourism businesses on sustainable tourism principles
 - To advocate on behalf of tourism businesses and key stakeholder groups
 - To sustainably grow NBP's tourism industry
 - To promote NBP as a world-class tourism destination



Note: Parks Canada's State of the Parks performance measure template could be modified and adapted.

Managing Progress of the Sustainable Tourism Management Plan, cont'd

- Action Item (Transition Period): The TAG chairperson with the support of one or two TAG members should undertake the development
 of a scorecard framework to be rolled out in 2019 and re-evaluated in 2020 and 2021. We recommend the following steps for
 development of the score card:
- Step 1: Mapping the TAGactivities (i.e., initiatives outlined in the sustainable tourism management plan) and linking back to what key tourism stakeholders and funding partners focus on, finding the common metrics and areas of alignment
- Step 2: Identifying and quantifying all of the plan's programme efforts and industry touch points
- Step 3: Working out a scorecard
- Step 4: Vetting the approach with select TAGmembers
- Step 5: Implement/roll out of the scorecard during 2019 and quarterly evaluation during Year 1

Enacting the Proposed Structural Changes

Form a Tourism Advisory Group (TAG).	Overall objective: To ensure tourism management within NBP is industry led and market driven (i.e., within a sustainable lens) and governed by a leadership group representative of the key stakeholders and balanced by an effective mix of business, government and non-profit/community groups. How: A terms of reference should be drafted outlining the mandate of the Tourism Advisory Group members including six to 10 individuals with an elected chairperson and governed by a three-year term limit (with a maximum of one renewable mandate). Destination British Columbia's industry advisory boards/committees could be reviewed for reference (https://www.destinationbc.ca/About-Us/Tourism-Marketing-Committee.aspx). Timing: Transition Period Resourcing: Volunteer organization Performance Measurement: Management of the plan via the proposed scorecard
2. Empower the TAGthrough a Terms of Reference (TOR)	Overall objective: To ensure TAGroles and lines of communication/reporting are clearly defined, as well as how TAG interacts with the Tourism Manager How: A brief guiding TOR should be drafted by the TAG as their first order of business on what their role will be, how they will be empowered to implement the sustainable tourism management plan and their strategic oversight of the proposed Tourism Manager. Timing: Transition Period Resourcing: Led by the TAG Performance Measurement: to ensure the TORis workingeffectively
3. Develop a jobdescription and retain a Tourism Manager	Overall objective: To provide a dedicated human resource to lead the work outlined in the sustainable tourism management plan How: A job description including the right mix oftourism, economic development and municipal servicing skills and experience should be required. The TAG could assist in development of the job description. Timing: Transition Period Resourcing: Led by the funding parties with support of the TAG Performance Measurement: Annual performance review and utilisation of the proposed scorecard
Secure funding for the Tourism Manager and tourism management initiatives	Overall objective: To provide initial 'start-up' funds to allow for some of the key initiatives to be started. How: The funding parties contribute (initially) to one year of salary for a joint Tourism Manager for the purposes of implementation of initiatives outlined in/linked to the sustainable tourism management plan. Timing: Transition Period Resourcing: N/A Performance Measurement: The provision of at least \$25,000 to \$50,000 for Year 1 (i.e., minimum required to retain the Tourism Manager for two to three days/week plus basic expenses; given the complexity of the issue the higher end is recommended).

Sustainable Tourism Management Action Plan – Key Pillars

The following are the list of key pillars and associated strategies and tactics which will form the basis of the Sustainable Tourism Management Action Plan. The pillars are designed to focus the management of tourism in NBP from 2018 to 2021. Detail for each pillar is provided including the overall objective, timing, resourcing and performance measurement criteria.

While some of the pillars and tactics might be considered basic and/or common sense, we believe that they are needed in order to effectively develop a more sustainable tourism industry and offering in NBP, while also ensuring an open and inclusive stakeholder environment. Furthermore, our intention is to highlight how a number of the tactics will help drive innovation within the tourism industry using technology (i.e., the proposed digital-first marketing framework, etc.).

Sustainable Tourism Management Action Plan – Key Pillars

Strategy 1: Community and Industry Engagement This pillar is designed to effectively communicate the direction, management and performance measurement of the tourism plan with all key stakeholders in NBP.	Strategy 2: Product and Experience Development This pillar is designed to develop and refine NBP's product and experiences offerings including in shoulder seasons and new areas as well as build capacity with local operators to deliver tourism experiences.
Roll out and communication of the plan to both the residents and travel industry stakeholders; with a once yearly town hall style update and engagement meeting.	Complete and maintain the asset inventory database and qualify all NBP operators according to their market, trade and sustainability readiness.
2. Set up of an online communications portal/website. The portal will also be set up to capture and manage stakeholder content and industry communications. The portal will allow businesses to provide feedback/opinions on visitor experiences, interactions and issues that arise and comment how current changes are affecting their businesses.	2. Based on a suggested itinerary example framework, identify, develop and promote key sustainable tourism itineraries aligned to adventure tourism (hiking, cycling, paddling and trekking), incorporating other product activities including touring, culinary, cultural, dark skies and Indigenous tourism); also include a number of itineraries in shoulder seasons including winter product experiences.
3. Initiate an annual report back to the community, municipality and tourism industry stakeholders.	3. Delivery of experience development and training workshops to local tourism operators to build capacity (i.e., workforce training, marketing training, service delivery, etc.) around the itineraries and the shoulder seasons opportunity and move a defined number of operators each year along the market, trade and sustainability readiness ranking. The workshops will include a core sustainability element to educate and train operators on sustainable tourism management and delivery principles.
Conduct quarterly meetings with Tobermory and Lion's Head communities and the SON(and possibly Southern Bruce Peninsula) to review tourism management issues, develop collaborative tourism initiatives, and forward plans.	Identification and roll out of a regional tourism signage and digital mapping plan to encourage regional dispersal beyond a limited number of tourism assets.

Sustainable Tourism Management Action Plan – Key Pillars

Strategy 3: Investment and Asset Development This pillar is designed to secure stable funding for the plan initiatives as well as manage existing tourism infrastructure and develop new tourism assets.	Strategy 4: Sustainability Positioning and Destination Branding This pillar is focused on the communication (to consumers and the travel trade) of Northern Bruce Peninsula's tourism brand/experience.
Investigate the Municipal Accommodation Tax, revisit the revenue share plan with the Municipality (Parking Fee) and Chamber of Commerce (potential Visitor Amenity Fee) – with funds allocated for tourism management (i.e., this plan)	1.Development and management of a travel trade plan to transition to higher-value and more experiential tour operators – linked to the new itineraries.
2.Solicit other funds (i.e., for dedicated projects and/or admin/staffing) from identified sources (e.g. MTCS, OMAFRA, Parks Canada, NGOs/Foundations, Bruce County); solicit non-restricted funds (i.e. for all initiatives) from tourism industry partners (i.e., via a proposed cooperative marketing and communications programme).	2.Development and management of an annual consumer marketing programme designed around a digital-first content marketing framework.
3.Develop and manage an infrastructure plan including for hard assets (bathrooms, workforce accommodations, parking, roads, signage, etc.) linked to tourism delivery – in partnership with the Municipality.	Development and management of an annual supporting communications and PR plan.
4.Develop a brief and retain the services of a planner to outline development plans for 1 to 3 new tourism assets (i.e., including the SON Interpretive Centre); once developed; identify and pitch prospective investors/developers.	4. Roll out of a Sustainable Tourism Commitment (extension of the BPEG Manifesto). This idea would involve the integration of travel consumers within the overall sustainability positioning of the destination. The intention would be to outline a plan whereby NBPwould openly communicate its sustainable tourism mandate and encourage travel consumers to travel to and experience the destination upholding a basic set of sustainable travel principles (i.e. aligned with the ultimate sustainable tourism definition NBPadopts). In this case the responsibility for sustainable tourism within NBPis jointly shared between the tourism industry and travel consumers.

Pillar 1: Implementation

Strategy 1: Community and Industry Engagement This pillar is designed to effectively communicate the direction, management and performance measurement of the tourism plan with all key stakeholders in NBP.	Resourcing	<u>Timeline</u>	<u>Key Performance</u> <u>Indicators</u>
Roll out and communication of the plan to both the residents and travel industry stakeholders; with a once yearly town hall style update and engagement meeting.	- TAG led	 Transition Period Annual Town Hall each January 	Outputs: Communication of the plan; hosting the Town Hall; Annual report to stakeholders and the community Outcomes: A community more engaged on sustainable tourism management and understanding of the positive benefits of soundly managed tourism development and growth
2. Set up of an online communications portal (likely Facebook to start and eventually a dedicated industry website). The portal will also be set up to capture and manage stakeholder content and industry communications. The portal will also allow businesses to provide feedback/opinions on visitor experiences, interactions and issues that arise and comment how current changes are affecting their businesses. Note that an existing stakeholder website might be adopted/upgraded for this purpose rather than introduce a new website to the many already existing. An online booking system might also be an aspect of this (in which software could facilitate packaging and cross marketing of other attractions and services).	- Tourism Manager	 Year 1 – Set up Year 2 and Year 3 – Management and Updating 	Outputs: Unveiling and use of the portal Outcomes: A community more engaged on sustainable tourism management and understanding of the positive benefits of soundly managed tourism development and growth

Pillar 1: Implementation, cont'd

Strategy 1: Community and Industry Engagement This pillar is designed to effectively communicate the direction, management and performance measurement of the tourism plan with all key stakeholders in NBP.	<u>Resourcing</u>	<u>Timeline</u>	<u>KeyPerformance</u> <u>Indicators</u>
3. Initiate an annual report back to the community, municipality and tourism industry stakeholders.	- Tourism Manager with the supportof the TAG	 Year 1 (December) Year 2 – Review and Modify Year 3 – Review and Modify 	Outputs: Annual Report launch Outcomes: A community more engaged on sustainable tourism management and understanding of the positive benefits of soundly managed tourism
4. Conduct quarterly meetings with Tobermory and Lion's Head communities (and possibly Southern Bruce Peninsula) to review tourism management issues, develop collaborative tourism initiatives, and forward plans. Note: These groups possibly could be included as ex-officio members on the TAG	- TAG with input from the Tourism Manager	 Year 1 – Initiate the meetings Year 2 and 3 – work for at least a quarterly meeting (possibly coinciding with existing TAG meetings 	Outputs: Launch of meetings and keeping regular minutes to ensure advancement of agendas Outcomes: More cohesive tourism management within the region stickingto sustainable tourism principles

Pillar 2: Implementation

Strategy 2: Product and Experience Development This pillar is designed to develop and refine NBP's product and experiences offerings including in shoulder seasons and new areas as well as build capacity with local operators to deliver tourism experiences.	<u>Resourcing</u>	<u>Timeline</u>	<u>Key Performance</u> <u>Indicators</u>
Complete and maintain the asset inventory database and qualify all NBP operators according to their market, trade and sustainability readiness.	- Tourism Manager	 Year 1 – Management of the asset inventory Year 2 and Year 3 – roll-out plan in place to qualify a large number (i.e., 10 to 20) operators according to their market, trade and sustainability readiness 	Outputs: Management of the asset inventory; workshop activities to educate operators Outcomes: A well defined tourism stakeholder universe in NBP with operators qualified by levels of readiness with a pathway for advancement
2. Based on a suggested itinerary example framework (see: http://rto12.ca/documents/itinerary-project-final-report/), identify, develop and promote key sustainable tourism itineraries aligned to adventure tourism (hiking, cycling, paddling and trekking), incorporating other product activities including touring, culinary, cultural, dark skies and Indigenous tourism); also include a number of itineraries in shoulder seasons including winter product experiences.	- Tourism Manager	 Year 1 – Development of the itinerary framework and a proposed list Year 2 and Year 3 – Development and launch 	Outputs: Itinerary framework; at least 5+ itineraries launched by Year 3 Outcomes: Increased seasonality and regional dispersal to take environmental pressure off main assets

Pillar 2: Implementation, cont'd

Strategy 2: Product and Experience Development This pillar is designed to develop and refine NBP's product and experiences offerings including in shoulder seasons and new areas as well as build capacity with local operators to deliver tourism experiences.	Resourcing	<u>Timeline</u>	<u>Key Performance</u> <u>Indicators</u>
3. Delivery of experience development and training workshops to local tourism operators to build capacity (i.e., workforce training, marketing training, service delivery, etc.) around the itineraries and the shoulder seasons opportunity and move a defined number of operators each year along the market, trade and sustainability readiness ranking. RTO7 as well as Ontario Tourism, Culture and Sport could likely be engaged to support/co-fund/co-lead these workshops.	- Tourism Manager	 Year 1 – Conduct a needs assessment with operators and develop a workshop training calendar Year 2 and Year 3 – Deliver at least 2 workshop training sessions and obtain feedback from participants 	Outputs: Needs assessment survey launch and workshop training plan delivered; minimum 4 workshops conducted Outcomes: X(TBD by TAG) operators qualified on the sustainability readiness ranking
4. Identification and roll out of a regional tourism signage plan to encourage regional dispersal beyond a limited number of tourism assets. The County and RTO7 could be engaged to support this initiative.	- Tourism Manager	 Year 2 – Development of the regional tourism signage plan Year 3 – Partial implementation of the plan assuming funding 	Outputs: Signage plan developed and implemented Outcomes: Increased regional dispersal to take environmental pressure off main assets; increased regional dispersal to open new tourism routes and stimulate growth in new tourism businesses

Pillar 3: Implementation

Strategy 3: Investment and Asset Development This pillar is designed to secure stable funding for the plan initiatives as well as manage existing tourism infrastructure and develop new tourism assets.	Resourcing	<u>Timeline</u>	Key Performance Indicators
1. Investigate the Municipal Accommodation Tax, revisit the revenue share plan with the Municipality (Parking Fee) and Chamber of Commerce (potential Visitor Amenity Fee) – with funds allocated for tourism management (i.e. this plan)	- Tourism Manager with support from TAG	- Year 1 – Investigation of MAT; further discussion of the parking fee revenues and with the Chamber re a potential Visitor Amenity Fee - Year 2 – Design of potential MAT - Year 3 – Launch of MAT (if pursued)	Outputs: further research; decisions made Outcomes: At least \$X(TBD by TAG) in annual sustainable funding by Year 4 with X%(TBD by TAG) provided by each funding source
2. Solicit other restricted funds (i.e., for dedicated projects and/or admin/staffing) from identified sources (e.g., MTCS, OMAFRA, Parks Canada, Bruce County, NGOs/Foundations); solicit non-restricted funds (i.e. for all initiatives) from tourism industry partners (i.e. via a proposed co-operative marketing and communications programme).	- Tourism Manager with support from the TAG	 Year 1 – Actively solicit restricted funds via donor applications Year 3 – Development and launch of the co-operative marketing and communications programme 	Outputs: Donor outreach and at least 3 applications submitted by Year 3 Outcomes: At least \$X(TBD by TAG) in annual sustainable restricted funding; launch of marketing and communications programme designed to reposition NBPas a sustainable tourism destination

Pillar 3: Implementation, cont'd

Strategy 3: Investment and Asset Development This pillar is designed to secure stable funding for the plan initiatives as well as manage existing tourism infrastructure and develop new tourism assets.	Resourcing	<u>Timeline</u>	<u>Key Performance</u> <u>Indicators</u>
3. Develop and manage an infrastructure plan including for hard assets (bathrooms, workforce accommodations, parking, roads, signage, etc.) linked to tourism delivery – in partnership with the Municipality.	- Tourism Manager and Municipality	- Year 2 – Develop a tourism asset servicing and development plan	Outputs: Development of the plan Outcomes: A more cohesive and integrated infrastructure planning framework to ensure sustainable tourism growth and delivery
4. Develop a brief and retain the services of a planner to outline development plans for 1 to 3 new tourism assets (i.e., including development of the Saugeen Ojibway Nation Interpretive Centre); once developed; identify and pitch prospective investors/developers. Note: See Section 7 for possible new tourism assets to explore and develop.	- Tourism Manager with support from the TAG (and especially SON)	- Year 3 – Develop brief and retain planner	Outputs: Planning brief Outcomes: New investment into NBP with a focus on sustainable tourism asset development

Pillar 4: Implementation

Strategy 4: Sustainability Positioning and Destination Branding This pillar is focused on the promotion, marketing and communication (to consumers and the travel trade) of 's tourism brand experience.	Resourcing	<u>Timeline</u>	<u>Key Performance</u> <u>Indicators</u>
1. Development and management of a travel trade planto transition to higher-value and more experiential tour operators – linked to the new itineraries (Travel Trade: resellers of travel products/services that they havebought and/or reserved from other parties).	- Tourism Manager	 Year 1 – Development of the Travel Trade plan and launch with a limited number of existing operators leveraging the proposed new itineraries Year 2 and 3 – Full launch of the plan and transition to high-value operators by the end of Year3 	Outputs: Development and launch of travel trade plan Outcomes: At least 50% of the travel trade mix by Year 3 are sustainable-conscious operators and a more diversified mix of higher-value travellers in NBP measured by an intercept survey in Year 3
2. Development and management of an annual consumer marketing program designed around a digital-first content marketing framework. The marketing program will clearly position NBP as a sustainable-focused tourism destination and focus outreach and messaging to appeal to a more sustainably-conscious consumer. In addition to broad destination branding messaging, tactical messaging should also be communicated: e.g., the region having limited space, a fragile eco-system, the need to book in advance, how to prepare/what to wear, orientation, the parking fees, accommodation options, etc.	- Tourism Manager with support from the TAG	 Year 1 and 2 – Basic marketing plan utilising open-source social media assets Year 3 – Launch of full programme 	Outputs: Initial social media campaign management followed by a fully-integrated content marketing plan by Year 3 Outcomes: By Year 3 NBP is recognized as a sustainable tourism destination by the travel trade and consumers as measured by digital listening linked to the marketing plan

Pillar 4: Implementation, cont'd

Strategy 4: Sustainability Positioning and Destination Branding This pillar is focused on the promotion, marketing and communication (to consumers and the travel trade) of 's tourism brand experience.	<u>Resourcing</u>	<u>Timeline</u>	<u>Key Performance</u> <u>Indicators</u>
3. Development and management of an annual supporting communications and PRplan.	- Tourism Manager	 Year 1 – Development of the communications and PRplan and at least 1 major messaging push in terms adoption of the sustainable tourism management plan Year 2 and 3 – Full launch of the plan 	Outputs: Launch of the plan and at least X(TBD by TAG) FAM trips and Xmedia articles themed around NBP's sustainable tourism positioning Outcomes: By Year 3 NBP is recognised as a leading sustainable tourism destination in Canada (with possible brand testing linked to Destination Canada's Global Tourism Watch)
4. Roll out of the NBP Sustainable Tourism Commitment to build the case for joint responsibility for sustainable tourism within NBP between the tourism industry andtravel consumers. This effort could dove-tail with the development (and communication) of a Municipal Accommodation Tax (MAT) – this could in turn be used to fund tourism management activities in the latter years of the plan.	- Tourism Manager with support from the TAG	 Year 2 – Development of the plan via engagement with key stakeholders and residents Year 3 – Refinement of the communications assets and linking with the MAT; full launch 	Outputs: Launch of the Sustainable Tourism Commitment Outcomes: By Year 3 NBP is recognized as a sustainable tourism destination by the travel trade and consumers as measured by digital listening linked to the marketing plan



Northern Bruce Peninsula's Current Tourism Situation & Main Issues

Current Situation

Over the past two years, tourism activities in NBPhave grown much more quickly than in the last decade. The growing popularity of the Bruce Peninsula and Fathom Five Marine National Parks and private sector tourism operations have strained natural and built infrastructure throughout the region. This trend shows no signs of abating. Sustainability challenges are paramount both in terms of impact on human resources, environmental attributes, community social/cultural aspects, and tourism assets. This Sustainable Tourism Management Action Plan for NBPmust adhere to a comprehensive and integrated sustainability approach: to mitigate negative impacts and promote positive outcomes for the local residents, sustainable tourism operators and their staff, parks and land managers, and visitors.

Main Issues

The most prominent issues revealed from this project include:

- Increased visitor numbers during the peak tourism season;
- Increased pedestrian and vehicle traffic;
- Litter:
- Parking;
- Insufficient restroom facilities;
- Lack of accommodations and food/beverage services to meet visitor demand;
- Lack of availability and affordability of accommodations for tourism staff;
- Perceived, potential or actual environmental impacts on natural assets;
- Impacts on septic systems;
- Potential impacts on water table / water quality;
- Competition/displacement of local residents affecting quality of lifestyle;
- Perceptions of 'over-tourism' affecting quality of guest experience;
- Historically limited collaboration between keystakeholders;
- Insufficient information to set expectations and elicit desirable behaviours from visitors.

^{*} The supporting documentation section provides a detailed list of key themes that were identified throughout our research and stakeholder outreach

Strengths, Weaknesses, Opportunities, and Threats (SWOT) – Northern Bruce Peninsula

There are a number of different ways to evaluate where NBP is at as a destination. This section provides a summary of the SWOT analysis. The SWOT analysis is useful for understanding the current and predicted drivers that will influence tourism in NBP and surrounding area. The SWOT was created based on all of our findings from our research, interviews and workshop and is used as the framework for the strategies and tactics presented in this plan.

STRENGTHS

- Beautiful natural environment and natural assets
- Unique and well-known diverse outdoor activities
- Strong presence and awareness of the region
- · Leadership by community champions
- Strong volunteer community
- · Culture and history of the region
- Access to visitor population base & international airport

OPPORTUNITIES

- Dispersal strategies including product and experience development, product packaging and marketing and messaging
- Positioning the Northern Bruce Peninsula as a leader in sustainable tourism management
- Enhanced marketing and messaging to attract quality tourists within niche markets
- Extended season into shoulder months and/or winter seasons
- Education and training for tourism businesses, residents, visitors, and Municipal Council
- Enhanced regional and community collaboration
- Create an environment attractive to sustainably-oriented entrepreneurs
- Indigenous tourism development

WEAKNESSES

- Actual and perceived negative impacts of tourism (i.e., congestion, parking, noise, garbage, etc.)
- Potential differences in perceived impacts versus actual impacts
- Limited product and experiences visitors can purchase and engage with
- Most activities/attractions are low-cost or free
- Limited accommodation options
- Ubiquitous workforce challenges
- Infrastructure limitations (i.e., roads, parking, sewer, septic, water)
- Limited amenities/services (i.e., transportation, accommodations, food/beverage, retail, capacity)
- · Lack of awareness of the contribution of tourism
- Lack of leadership and agreement on community tourism priorities
- Limited industry statistics and research on the region

THREATS

- Negative impacts of continued growth of tourism without collective sustainable tourism management strategies
- Continued development of low-cost and free attractions
- · Changing visitor characteristics and visitor trends
- Increasing competitiveness of other sustainable destinations within Ontario
- · Degradation of natural, social and cultural assets
- · Damage to destination reputation

SWOT: Priority Strengths

Evident by the growing visitation to the region, Northern Bruce Peninsula has numerous destination strengths. The region's success is built on its beautiful natural environment, strong community and leadership, and its significant culture and history. The priority strengths leveraged in this plan are highlighted below:

- Beautiful natural environment and natural assets
 - Bruce Peninsula National Park and Fathom Five National Marine Park were established in 1987 as respective representative examples of the Great Lakes/ St. Lawrence Lowlands natural region, and the Georgian Bay ecosystem (Parks Canada, 2015). The dramatic and unique Great Lakes Canadian Shield landscapes created by the topography of the Niagara Escarpment has made the Northern Bruce Peninsula a destination desirable to close to 500,000 visitors per year.
- Unique and well-known diverse outdoor activities
 - The Bruce Trail and Bruce Peninsula National Park, Fathom Five National Park, and more specifically, The Grotto and Flowerpot Island have attracted visitors to NBPfor decades. Scuba diving maintains steady visitation, however; participation in marine sight-seeing, snorkeling, and hiking have grown dramatically in the last few years.
- Strong presence and awareness of the region
 - The 'sense of place' presented by these unique landscapes differentiates NBP from other attractions and destinations in Ontario and Eastern Canada.
- Access to visitor population base & international airport
 - Population growth in the Greater Toronto Region, combined with overall growth in global travel and tourism have combined to increase visitation to NBP, particularly in the last few years.

SWOT: Priority Weaknesses

Along with the strengths of NBP, the region has a variety of weaknesses that are contributing to the negative impacts encountered by residents and visitors. The weaknesses highlighted below are key attributes to the over-tourism issue and are weaknesses that provide an opportunity for improvement by utilizing the strategies and tactics provided in this plan.

- Actual and perceived negative impacts of tourism (i.e., congestion, parking, noise, garbage, etc.)
 - Visitation to NBPduring peak summer tourism season (July, August) over the last two years (2016, 2017) has peaked to the
 point of outstripping municipal, regional, and corporate infrastructure and services. Traffic, parking, and litter are the primary
 complaints presented by local residents. Locals also find themselves in competition for commercial/retail services during peak
 times.
- · Limited product and experiences visitors can purchase and engage-with
 - Parks Canada has implemented parking controls and access limits resulting in a significant number of visitors being turned away at Bruce Peninsula National Park (Cyprus Lake / Grotto) during peak times. Summer 2017, Parks Canada put forward a solution of 3 timed entry periods and handed out tickets for those which appear to have worked well; for 2018 Parks Canada wants to introduced additional parking management strategies. Commercial tourism operators have been attempting to expand services to address increasing visitor demand. The region offers limited attractions and activities beyond marine sight-seeing, snorkeling, scuba diving, and hiking. Other activities/products/experiences are niche and limited in availability.
- Low-cost of free attractions/experiences
 - Access to the National Parks is low-cost or free (depending on access point and mode). Commercial tourism attractions are relatively low cost in comparison to similar activities (marine sight-seeing tours) in other jurisdictions.
- Limited accommodation options and infrastructure (i.e., roads, parking, sewer, septic, water)
 - o During peak tourism season, accommodations, parking, and other are beyond capacity.
- Limited amenities/services (i.e., transportation, accommodations, food/beverage, retail, capacity)
 - The single highway access funnels all traffic and creates congestion. Most visitors access the region by private motor vehicle.
 There are some commercial coach operators. Public transit options are virtually non-existent. Retail services (food & beverage) are at or beyond capacity during peak tourism season.

SWOT: Priority Opportunities

As mentioned in the previous slide, NBPhas much opportunity to minimize the negative impacts of tourism in the region while also enhancing the community and economy. Below are the key opportunities for NBPto leverage:

- Dispersal strategies including product and experience improvement/enhancement, product packaging and marketing and messaging
 - Increasing awareness of accommodation and service constraints for visitors during peak tourism season can influence visitors to better plan and prepare for travel to NBP.
 - Coordination of messaging amongst key stakeholders and tourism operators will ensure consistent messaging.
 - o Product/experience improvement in alignment with desirable visitation can mitigate negative visitation impacts.
 - o Regional collaboration and communications can identify bottle-necks and identify potential development areas.
- Positioning NBP as a leader in sustainable tourism management
 - Alignment of communications and actions by key stakeholders and tourism operators targeting desirable visitors and behaviours can attract visitors interested in sustainable tourism attractions and activities.
- Enhanced marketing and messaging to attract quality tourists within niche markets
 - Research and understanding of the needs, interests, and behaviours of current and potential visitors to NBP can inform marketing and messaging strategy.
 - o Coordination of messaging is critical to ensure consistency across the region.
- Education and training for tourism businesses, residents, visitors, and Municipal Council
 - Tourism operators and stakeholders commonly lack understanding of the trends, needs, and interests of desired target markets. Education on destination development can enhance understanding and collaboration.
 - Customer service delivery is not just 'common-sense', but requires training and modeling of best-practice behaviours to meet customer expectation and inform on local values.
 - Parks Canada has educational/training modules which could assist
- Enhanced regional and community collaboration
 - Anumber of passionate stakeholder groups value the sustainable integrity of NBP. Understanding the respective values of each stakeholder group to facilitate agreement on core regional values can inform strategy and execution of sustainable tourism management tactics.

SWOT: Priority Threats

While weaknesses are conditions that NBP can leverage and improve, threats are potentially harmful scenarios that may be outside the control of the committee and/or tourism personnel. The below are important threats that the region should be aware of and plan for accordingly.

- Negative impacts of continued growth of tourism without collective sustainable tourism management strategies
 - 'Unmanaged Tourism' may continue to grow and increase the undesirable impacts of tourism identified by the sustainable tourism steering committee members, interviewees, and survey respondents.
- Continued development of low-cost and free attractions
 - Low-cost and free attractions promote mass-tourism visitation. Mass-tourism activities enhance negative impacts of visitation (traffic, litter, water quality) while limiting relative per-visitor commercial and tax revenue opportunities.
- Changing visitor characteristics and visitor trends
 - o Global tourism is expected to increase from 1 Billion travellers per year (2012) to almost 2 Billion travellers per year by 2031.
 - Conversely, a growing segment of the travel market is becoming increasingly adverse to mass-tourism attractions and has
 growing interest in sustainable tourism attractions, activities, and destinations.
- · Degradation of assets and reputation
 - 'Unmanaged Tourism' has been shown to negatively impact natural and environmental assets, strain community infrastructure, and quality of life for locals. Mass-tourism destinations are typically implementing responsive rather than pro-active mitigation strategies (Venice, Barcelona, Machu Picchu).

Northern Bruce Peninsula – Tourism Asset Inventory

• As part of the development of this plan, tourism assets were inventoried and are provided in a spreadsheet in the Appendix (page 98). The inventory assigns assets to categories and subcategories (e.g. Accommodation, Attraction, Retail, etc.), indicates whether they are Demand Generators, Supporting Assets or Potential Assets, provides contact information and where available, asset ownership/management, hours/season, and capacities (e.g. rooms). Approximately 230 assets are listed, based on available information (largely online) at time of review; as this information changes constantly, it will to be determined specifically how this listing will be used and maintained.

Potential New Tourism Assets for Northern Bruce Peninsula

The following is a list of potential new tourism assets for Northern Bruce Peninsula to further explore and possibly develop. RTO7 and possibly the Ministry of Tourism, Culture and Sport could be engaged to fund further investigation and feasibility of these ideas:

- Possible new offerings in the two national parks to be explored via Fathorn Five and Bruce park management plans (2018-2020)
- Niagara Escarpment interpretive centre (i.e., in Dyers Bay).
- Work with Nature Conservancy of Canada, Escarpment Biosphere Conservancy, Bruce Trail Conservancy, Ontario Nature to host guided tours of their lands and complement this with volunteer ambassador hikers.
- Cabot Head Lighthouse closed for decontamination by the Federal Government, but likely to re-open in 2019-20. This could be
 developed further and made more sustainable with a shuttle system by bus or boat and bike rentals in Dyers Bay. Parks Canada could
 be engaged as a partner.
- Folk School following the Appalachian Folk School model which is year-round. This would further strengthen NBP's cultural tourism offerings (i.e., a topic to be explored at the 2018 Sources of Knowledge Forum in Tobermory). Local products could be sold.
- Generally more restaurants and accommodation options in Tobermory including beyond the high summermonths.
- Expand Tobermory Historical Museum, possibly offering local products for sale.
- New additional waterfront access outside of the Park (i.e., in Stokes Bay).
- Need to explore vision with Ontario Parks and their plans for the various Provincial Parks and Nature Reserves in NBP.
- The Bruce Peninsula Biosphere Association has already developed <u>EcoAdventures</u> in alignment with the objectives of this plan, including a winter offering that was delivered in Winter 2017. This experience is a high-end, multi-day adventure with a licensed guide in a safe, educational environment, maximizing visitors return on investment.

Sustainable Tourism Management Action Plan – Quick Wins

The issues facing NBP have taken many years to develop (although have largely manifested in recent years) and are likely to take at least that long to turn around. That said, the following are a list of proposed Quick Win initiatives the TAG could explore as focus areas during the transition period to demonstrate action and work towards more sustainable tourism management in NBP.

- 1. The TAG could host a town hall/public meeting to articulate the plan and galvanize public support for the outlined tourism vision
- The TAG could identify two to three more sustainable tour operators and host a FAM trip in partnership with a number of local tourism operators and Parks Canada, to hopefully start the process of shifting the mix of current low-yield, mass-market tourists visiting the Region
- 3. The TAG could identify two to three itineraries aligning with NBP's target market, including dispersal tours throughout Lions Head and Tobermory in the summer and focused on development of the spring and fall shoulder seasons where possible (see next)
- 4. Communications: The park is launching an online booking system in 2018. This might be coordinated with a campaign highlighting the new booking requirement/site, the above itineraries, plus travel options, better times to visit, expectations, preparations and how to behave. This could be a digital campaign, but all messaging and content should align to the outlined vision for more sustainable tourism in NBP.
- 5. As a corollary to this, or perhaps prior to undertaking any communications, identify messaging in the marketplace that is inconsistent with that intended and attempt (where possible) to influence the direction/nature of this messaging in future (e.g. Narcity frequently publishes misleading promotional messaging relating to the Peninsula).
- 6. Marketing: Determine groups appropriate (Bruce Trail Association, biking groups, tour operators, etc.) to promote the tours and the above communications messaging.
- 7. Asset Management: Go through the asset inventory to determine a handful of assets that have the potential to become demand generators e.g. prioritize three to five assets that could become asset demand generators with some support.
- 8. A small group of like-minded operators have discussed partnering on 1-3 day winter offerings such as BPBA's Eco Adventures which seem an effective way in which to test the winter market.
- 9. BPEG has already moved forward with expanding their Manifesto rack card initiative (which has been a positively received grassroots effort to date) to printing tent cards for summer 2018 that are more permanent messaging for local accommodators to display. Consider further expanding this to a visitor pledge and ensure that it is effectively communicated/promoted once developed so others can align their efforts to it.

Northern Bruce Peninsula Criteria Development

- In addition to development of an Asset Inventory, three lists of criteria were developed for evaluation of tourism assets with respect to: Business Ready, Visitor Ready & Sustainability Ready.
- Definitions of each of these terms are below and associated criteria are provided in the Appendix (page 100).
- The purpose of the criteria is to position the operator to attract a better suited tourist for NBP (adventure traveler, hiker, culture seeker, etc.) while also considering the environment and local community. The TAG will need to determine how best to use this tool it could potentially be used for operator self-assessment, as the basis for further training/workshops on criteria and how to advance, as the basis for assessing which assets meet each level and might be suitable candidates for package development initiatives or other incentives.

Business Ready:

The asset is legally and functionally able to accommodate visitors while providing adequate information and communication channels. There is little to no evidence of planning for visitor growth and/or targeting of desired market to align with NBP's target market (as identified in the strategy).

Visitor Ready:

The asset has an established brand and proactively markets an audience that aligns with NBP's target market (as identified in the strategy) through cultural and educational experiences. This asset works with and/or should consider working with the international market.

Sustainability Ready:

The asset provides experiences consistent with NBP's target market and proactively plans to adapt to future needs. There is sufficient evidence that legitimate steps are being taken to improve the asset's impact on the local community and/or natural environment.



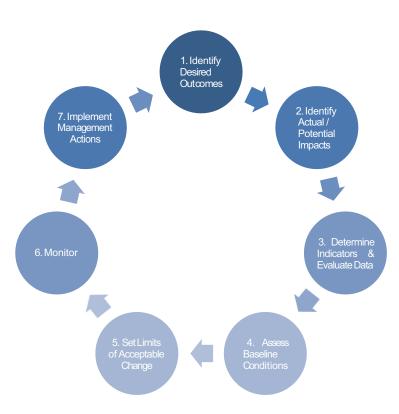
What is a Visitor Management Framework (VMF)?

The systematic process of understanding what undesirable impacts may occur, identifying indicators, setting limits of acceptable change and actively applying management actions to avoid or manage the undesirable impacts of tourism in the destination within acceptable limits.

AVisitor Management Framework (VMF) is the actions taken to manage visitors and their behaviours to ensure the integrity of host destinations, the environment, quality of life, culture and visitor experiences are maintained. It is a systematic process of understanding what undesirable impacts may occur, identifying indicators that represent those impacts, setting limits of acceptable change and actively applying management actions to avoid or manage the undesirable impacts of tourism in the destination within acceptable limits.

The VMF for NBP is not focused on simply determining "the maximum number of people the region can withstand" as this number is impossible to determine and is not "outcomes focused". Instead, the VMF will focus destination leaders and stakeholders on determining the desired environmental, social and visitor experience conditions within the region and applying management actions to keep the region within those conditions.

Development and application of a well thought out VMF is an essential component of NBP's Sustainable Tourism Management Action Plan.



Why Implement the VMF?

As previously stated, tourism can bring many positive benefits to NBPhowever, without proactive planning, monitoring and management, it can also bring undesirable impacts for the region. If these impacts are left un-checked, as tourism grows in the region so too will the negative impacts to the peninsula's environment, social well-being, cultures and the quality of the visitor experience we offer.

However, undesirable impacts occur through predictable patterns that, if understood, can be used to structure management systems and actions. With proactive planning and effective visitor management, the undesirable impacts can be avoided or mitigated and managed allowing NBPto maximize its tourism benefits.

Tourism Impacts in Northern Bruce Peninsula

Impacts occur as visitors arrive at and begin to interact with our region. Residents and stakeholders in NBP are already experiencing negative impacts of tourism. Though these impacts have, for the most, not been objectively substantiated, they have been commonly reported and are perceived to be occurring throughout the region. Recognizing that NBP is in the early stages of the destination lifecycle and tourism growth has and will continue to occur as the destination matures, it is reasonable to expect that the undesirable impacts reported today will also continue to grow and become more acute.

The perceived impacts identified by residents and stakeholders included concerns in the following categories:

- Environmental
- Social / Cultural
- 3. Political
- 4. Visitor Experience

The most common impacts referenced through the planning process are identified on the next page.

IMPACT
To have an effect or influence on.

Impacts can be positive or negative.

Tourism Impacts in Northern Bruce Peninsula, cont'd

Common negative tourism impacts identified for NBP:

Environmental	Social / Cultural	Political	Visitor Experience
Loss of habitat and habitat fragmentation	Reduction in quality of life for residents due to noise and increased vessel presence	Funding for tourism is insufficient	Unmet visitor expectations are leading to reduced visitor experience quality: Insufficient capacity (e.g., accommodations and parking passes) Lacking basic visitor services (e.g., washrooms, restaurants, trails) Overcrowding
Growing impacts to species at risk and their critical habitats	Increasing crowding, congestion and competition for local services such as parking downtowns	Perceptions that increased local taxation is a result of growing tourism	Market expectations for sustainable tourism experiences are not being met
Species mortality and decline	Loss of local lifestyle	Leadership and accountability for tourism impacts is unclear	Unfulfilled brand promises
Reduced water quality due to waste management (e.g., septic systems)	Increasing conflicts between local and visitors due to nuisance behaviours by visitors (e.g., improper use, noise, aggression)		
Increased solid and liquid waste production	Loss of indigenous culture and way of life		
	Increasing amenity migration (visitation, then relocation) and change to servicing in the region		56

Distribution of Northern Bruce Peninsula's Tourism Impacts

Though the negative impacts were reported to be occurring within NBP, anecdotally, their distribution and intensity are not uniform across the peninsula. Some impacts are localized within small portions of the peninsula while other impacts are occurring in multiple areas but to differing levels of intensity.

For the purposes of understanding and describing the distribution of tourism impacts, the peninsula has been segregated into the following "zones":

- 1. Bruce Peninsula National Park
- 2. Fathom Five National Marine Park
- 3. Downtown Tobermory
- 4. Downtown Lion's Head
- 5. Rural
- 6. Highway Corridors

Each zone is spatially distinct and faces different impacts at different levels of concern. Many of the impacts are reported, by residents and stakeholders, to be growing while others are relatively stable. The illustration on the next page presents the significance of the various impacts throughout the region.

Note: This output is based on a similar model used by Parks Canada.

Distribution of Northern Bruce Peninsula's Tourism Impacts, cont'd

The following map helps illustrates a sampling of the geographical significance of the impacts.

Type of Impact

Environmental



Social / Cultural

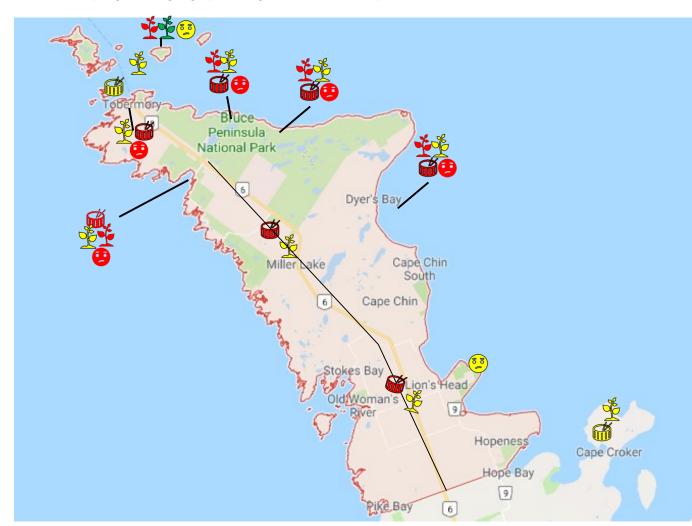


Level of Impact

High

Moderate

Low



The tables in the following pages detail, by zone, the most concerning impacts that have been reported to be occurring in the region.

ZONE	MOSTC	ONCERNING REPORTED IMPACTS	REPORTED LEVEL OF CONCERN	REPORTED TREND
BRUCE PENINSULA NATIONAL PARK		Vegetation trampling and soil compaction along trails and at key destinations in the park.	High	Growing
		Human / wildlife conflicts	Low	Stable
		Trail braiding, widening and social trail creation.	High	Growing
		Growing litter and increased municipal solid waste generation.	Moderate	Growing
		Damage to and removal of natural and cultural resources.	Low	Stable
	Social / Cultural	Increasing traffic and parking congestion.	Very High	Growing
		Vandalism	Low	Stable
Visitor Experience	Unmet visitor expectations as visitors can't access major attractions in the park (e.g., Grotto) due to limited parking access/ capacity.	Very High	Growing	
		Reduced experience due to perceived crowding at key destinations during peak season (e.g., Grotto).	Very High	Growing

ZONE	MO	ST CONCERNING REPORTED IMPACTS	REPORTEDLEVEL.OF CONCERN	REPORTED TREND
FATHOM FIVE NATIONAL MARINE PARK	Environmental	Vegetation trampling, soil compaction and riparian damage along shorelines and at key destinations such as flower pot island.	High	Growing
		Human / wildlife conflicts	Low	Stable
		Trail braiding, widening and social trail creation.	High	Growing
		Growing litter (terrestrial & marine) and increased garbage generation.	High	Growing
		Reduction in water quality	Moderate	Growing
		Emissions from tours boats creating air quality, smell and climate change concerns.	Low	Stable
		Damage to and removal of natural and cultural resources.	High	Growing
	Social / Cultural	Noise from tour boats (e.g., engines & microphones) on Big Tub Harbour disturbing residents on Big Tub Road.	High	Growing
		Tour boat traffic creating crowding for other recreational vessels travelling in BigTub Harbour.	Moderate	Growing
		Visual quality impacts as increased tour boat traffic reduces the quality of the views for residents along Big Tub Road.	Moderate	Growing
		Vandalism	Low	Stable
Visitor Experience	Visitor Experience	Reduced experience due to perceived crowding at key destinations during peak season (e.g., Flower Pot Island).	Moderate	Growing
		Unmet visitor expectations as visitors can't access major attractions in the park (e.g., Flower Pot Island) due to limited access.	Moderate	Growing
		,		60

ZONE	MOST CO	NCERNING REPORTED IMPACTS	REPORTED LEVEL OF CONCERN	REPORTED TREND
DOWNTOWN – Tobermory	Environmental	Habitat fragmentation and / or loss.	Low	Growing
		Growing litter and increased municipal solid waste generation.	Moderate	Growing
		Growing water consumption.	Moderate	Growing
		Energy consumption	Low	Growing
	Social / Cultural	Lack of parking and competition between locals and visitors for parking.	High	Growing
		Growing vehicular traffic congestion and wait times.	High	Growing
		Increasing capital and operational costs to manage visitor impacts or developvisitor infrastructure may increase taxation or reduce current spending on existing infrastructure / operations.	Moderate	Growing
		Criminal & nuisancebehaviours by visitors are creating conflicts with local residence (e.g., noise, disrespectful interactions,	Moderate	Growing
		trespass).		61

ZONE	MOST CONCE	RNING REPORTED IMPACTS	REPORTED LEVEL OF CONCERN	REPORTED TREND
DOWNTOWN – Tobermory		Unmet visitor expectations as visitors can't find accommodations.	High	Growing
		Lack of staff accommodations resulting in staffing shortages and reduced visitors servicing.	High	Growing

ZONE	MOST CO	NCERNING REPORTED IMPACTS	REPORTED LEVEL OF CONCERN	REPORTED TREND
DOWNTOWN – Lion's Head	Environmental	Habitat fragmentation and / or loss.	Low	Stable
		Growing litter and increased municipal solid waste generation.	Moderate	Stable
		Growing water consumption.	Moderate	Growing
		Energy consumption	Low	Growing
	Social / Cultural	Lack of parking and competition between locals and visitors for parking.	Moderate	Growing
		Growing vehicular traffic congestion and wait times.	Moderate	Growing
		Increasing capital and operational costs to manage visitor impacts or developvisitor infrastructure may increase taxation or reduce current spending on existing infrastructure / operations.	Moderate	Growing
		Criminal & nuisancebehaviours by visitors are creating conflicts with local residence (e.g., noise, disrespectful interactions,	Low	Growing
		trespass).		63

ZONE	MOST CONCE	RNING REPORTED IMPACTS	REPORTED LEVEL OF CONCERN	REPORTED TREND
DOWNTOWN - Lion's Head	Visitor Experience	Unmet visitor expectations as visitors can't find accommodations.	Moderate	Growing
		Lack of staff accommodations resulting in staffing shortages and reduced visitors servicing.	Moderate	Growing

ZONE RURAL	MOST CONCERNING REPORTED IMPACTS REPORTED LEVEL OF CONCERN REPORTED TREN			REPORTED TREND
	Environmental	Habitat fragmentation and/ or loss	Low	Growing
		Trail braiding, widening and social trail creation.	Moderate	Growing
		Growing litter and increased municipal solid waste generation.	Moderate	Growing
		Vegetation trampling, soil compaction and riparian damage along shorelines and at key destinations.	Moderate	Growing
	Social / Cultural	Lack of parking and competition between locals and visitors for parking.	Moderate	Growing
		Growing vehicular traffic congestion and wait times.	Moderate	Growing
		Trespass and privacy concerns	Moderate	Growing
HIGHWAYS	Environmental	Wildlife, including species at risk, mortality due to vehicular collisions.	Moderate	Growing
	Social / Cultural	Motor vehicle collisions & emergencies.	High	Growing
		Unsafe driving practices (e.g., speeding, road rage).	High	Growing
		Increasing travel and highway wait times.	High	Growing

Indicators & Data Sources for Northern Bruce Peninsula

The selection of indicators is one of the most important elements of the VMF. The indicators must relate to and meaningfully reflect the outcomes and conditions destination leaders and stakeholders desire for the Northern Bruce Peninsula. Additionally, the indicators must be objective and defensible while being cost-effective to regularly collect, analyse and monitor trends. It is essential that the selection of indicators are informed through meaningful engagement with local governments, tourism industry, Indigenous and other regional stakeholders. Without buy-in to the indicators, the credibility of regular destination reporting will be questioned, and the defensibility of management strategies will be weakened.

There are many different indicators that could be used to respond to the impacts identified. As NBP moves forward with implementation of the Sustainable Tourism Management Action Plan, destinations leaders will determine exactly which indicators and associated datasets will be used to monitor the most concerning tourism impacts.

The tables on pages 76-86 of the Appendix provide a guideline of possible indicators for NBP based on the region's current impacts in conjunction with indicators used in similar destinations, as well as the general data sets that could be used for each indicator.

Note: The Global Sustainable Tourism Council provides a suite of established indicators for both Destinations and Hotel Operators to adopt and apply. These indicators help destinations monitor the sustainability of their tourism industry.

Visitor Management Strategies

There are many management strategies that can be applied to prevent and respond to undesirable visitor impacts in NBP. Recognizing that some impacts are the result of uninformed visitors while others are the result of individuals who purposefully create damage or are simply the result of undersupplied infrastructure, the selected management strategies must respond to the root causes of the impacts.

Management strategies are generally categorized based on the directness in which they act on visitor behaviour. In general, management strategies include a) direct strategies and b) indirect strategies. Direct strategies directly target the visitor and limit their freedom of choice (e.g., regulation, enforcement). Meanwhile, indirect strategies attempt to target the decision factors on which visitors base their behaviours (e.g., educational programs, infrastructure development).

As NBP moves forward with implementation of the Sustainable Tourism Management Action Plan destination leaders will generate a more robust understanding of the current conditions for each impact indicator and establish thresholds and limits of acceptable change for each indicator. When that work is complete, destination leaders will identify and begin implementation of management actions to respond to the impacts that are approaching or exceeding determined thresholds.

Though the exact management actions are yet to be determined, the tables on pages 86-98 of the Appendix provide examples of direct and indirect management strategies that could be applied within NBP.

Visitor Management Framework Implementation

Avoiding and mitigating the undesirable impacts of tourism in NBP is critical to your success as a destination. Destination leaders recognize this and are committed to working with all players in the region's tourism industry to accurately understand, proactively plan for and devise strategies to address the impacts. It is understood that visitor management is about more than setting a "total" number of people that can travel to the region (carrying capacity). It is about truly understanding how the visitor impacts occur, understanding the impacts, setting limits of acceptable change and responding to changes in conditions with effective management strategies that appropriately target supply, demand, the resource and the visitor.

To begin implementing the Visitor Management Framework, NBPwill need to implement the following actions.

- 1. Destination leaders will work collaboratively with the regional tourism industry to select an achievable number of SMART(specific, measurable, achievable, realistic, time-bound) indicators on which to monitor the most concerning tourism impacts in the region.
- For each indicator, destination leaders will determine which indicators already have datasets that can be used to monitor the indicator, and which do not. The quality, reliability, geographic scope and frequency of data collection for each dataset should be assessed.
- 3. Where data gaps exist for indicators, destination leaders will determine if the impact is essential to monitor and if data may be available to support an alternative, yet relevant, indicator. Where data is not available, but the impact is essential to monitor, destination leaders will undertake the design of a new research / data collection program.
- 4. For each indicator, the current baseline condition will be determined by evaluating the respective datasets.
- 5. Through collaborative and participatory engagements with industry stakeholders, limits of acceptable change thresholds will be established for each indicator. In addition, triggers will be set for each indicator to suggest when management actions should be applied to stop undesirable trends or the exceedance of an established threshold.
- Destination leaders will develop and implement regular monitoring protocols, timeframes and accountabilities for each indicator. Monitoring will occur on a regular basis as determined through the monitoring protocols.

Condition is ok. No management action required



Conditions are changing negatively. Management action should be considered

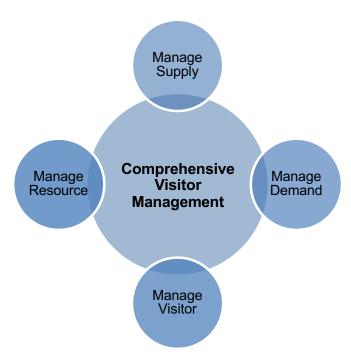


Conditions are approaching threshold. Management actions are required immediately.

Visitor Management Framework Implementation

- 7. As determined by the performance of each indicator, destination leaders will determine, and apply, an appropriate suite of direct and indirect visitor management strategies to address the impacts and maintain conditions within the limits of acceptable change.

 Destination managers will deliberately apply direct and indirect strategies that:
 - Manage the supply
 - Manage the demand
 - Manage the resource
 - Manage the visitor
- 8. Aregular "State of the Destination" report will be developed to present the results of the indicators and, as data allows, trends in the indicators to NBP stakeholders, Indigenous communities and residents. The State of the Destination report should present:
- The tourism goals for the region
- Descriptions of the progress made towards implementing the strategies and actions identified in the plan
- Visitation, occupancy and other performance metrics
- Feature success stories
- The status of each impact indicator and trends from the previous reporting period
- Priorities for the next reporting period





Methodology

Documentation / Literature Review

Adocumentation / literature review was undertaken to reveal the current context of sustainable tourism management planning globally, analyze documentation provided by key partner organizations, identify and analyze relevant plans, studies and other documentation relevant to the region, a competitive analysis of two National Parks in other jurisdictions with similar challenges to NBP (including Cairngorms National Park in Scotland, and Yellowstone National Park in the United States).

This document review combined with key stakeholder engagement activities informed development and validation of the SWOT(Strengths, Weaknesses, Opportunities, Threats) analysis, a thorough destination assessment (Phase 3), supported development of the Visitor Management Framework (VMF) designed to inform the activities of key stakeholder partners and regional tourism operators ensure actions are delivered in alignment with key pillars, tactics, and performance measurement.

Relevant documentation included:

Municipality of Northern Bruce Peninsula:

- a. Municipality of Northern Bruce Peninsula Economic Development Strategy (2017)
- b. Municipality of Northern Bruce Peninsula Strategic Plan (revised July 2015)

County of Bruce:

- a. Existing County Official Plan
- b. Existing Northern Bruce Peninsula Official Plan
- c. Materials regarding proposed updates to the Northern Bruce Peninsula Official Plan and new Zoning By-law
- d. Niagara Escarpment Plan (2017)
- e. Bruce County Economic Development Strategy
- f. Spruce the Bruce Community Design Toolkits for Lion's Head and Tobermory
- g. Spruce the Bruce Program Information
- h. Extensive mapping and data resources
- i. Bruce County Market Readiness Criteria

Methodology (continued)

Relevant documentation:

Parks Canada:

- a. Annual visitation summaries for BPNP and FFNMP
- b. Stats for daily number of vehicles redirected away from Cyprus Lake during peak season (2016, 2017)
- c. Prizm analysis summary based on postal code collection at Parks Canada Visitor Centre (2016) and Cyprus Lake (2017)
- d. Visitor Information Program (VIP) data for BPNP (2016, 2013) and FFNMP (2014)
- e. Parks Canada Alternative Transportation Study for BPNP (2016)
- f. BPNP& FFNMP Management Plans
- g. Economic Impact of Parks Canada (2011)
- h. Parks Canada, Promising Pathways
- i. Parks Canada 2014 2015 Departmental Performance Report
- j. Parks Canada Progress Report on Ecological Integrity of Canada's National Parks

Bruce Peninsula Environmental Group:

- a. Notes from October 2016 and February 2017 Public Meetings
- b. Results of January 2017 Community Survey Identifying Priority Projects for Sustainable Tourism
- c. Assorted reports/documents/links relating to the project (including Georgian Bluffs Airport Report, other Sustainable Tourism studies, etc.)

Other Regional Relevant Materials:

- a.Bruce Peninsula Biosphere Association Conservation and Stewardship plan
- b. First Nations Land Claims and Traditional Territory considerations
- c. Existing Management Plans or Policies for Provincial Parks within Northern Bruce Peninsula
- In addition, RTO7 will make available the following:
- d. RTO73 year Strategic Plan 2014
- e. RTO7Winter Leisure Travel Study 2011
- f. RTO7 Festivals and Events Strategy 2014
- g. RTO7 OTMPC Consumer Insights Research
- h. Ministry of Tourism Culture & Sport (MTCS) Region 7 Profile 2014 (2012 data)
- i. Ontario Activity Tourism Stats (2014) (Beach, Casino, Cultural, Cycling, Fishing, Golf, Hunting, Indigenous Tourism, Skiing, Snowmobiling, Sport)
- j. RTO7 Business Plan 2015
- k. RTO7Marketing Plan 2015

Methodology (continued)

Other Regional Relevant Materials:

- i. RTO7 GBDDPInternational Travel Trade Market Development Plan 2014
- RTO7 County of Grey and Township of Oro-Medonte Cycling Research
- k. RTO7Tourism Signage & Wayfinding 2014
- I. Tourism Workforce Report 2013
- m. Bruce County Visitor Analysis Study 2012
- n. Waterways Product Assessment
- o. Data Aggregation & Analysis Project, 2015
- p. RTO7 Sustainable Tourism Development Plan 2011
- q. RTO7Marketing Plan 2015

Other Relevant Materials:

- National Aboriginal Tourism Research Project
- Cairngorms National Park A Strategy and Action Plan for Sustainable Tourism
- National Parks Service Green Parks Plan (Yellowstone)
- Global Sustainable Tourism Council Criteria and Indicators
- Icelandic Pledge
- World Tourism Organization Indicators of Sustainable Development
- Transforming Communities Through Tourism
- TIAC Code of Ethics & Guidelines for Sustainable Tourism
- Ontario Ministry of Tourism Market Readiness Workbook
- CPAWSWildland League Human History of the Bruce Peninsula
- Parks Canada Saugeen Ojibway Proposed Management Themes
- Saugeen Ojibway Nation Archaeology Standards and Guidelines
- Various Aboriginal Tourism Association of Canada reports (now: Indigenous Tourism Association of Canada)
- · Indigenous Tourism Ontario
- UNWTO (2017) Tourism and the Sustainable Development Goals Journey to 2030, Highlights

Situational Analysis - Summary Themes

The following is a detailed summary of the key themes that were identified throughout our research and stakeholder outreach. The general feeling is that tourism is essential for the region, combined with the frustration of the substantial and unmanaged tourism growth in the last 3-4 years.

These themes helped develop the SWOTand the framework for the strategies and tactics found in this plan.

1. Challenges with Growth / Visitor Experience

- Frustration with visitor behaviours, # of visitors and development (including informal development)
- · Change of lifestyle / pace
- · Lack of services and amenities
- Impacts from over-visitation (traffic, parking, litter, congestion)
- Many visitors arriving without researching availability ahead of trip

2. Potential Asset Development:

(these need to be further researched for current access, infrastructure etc.)

- Trails
 - Bruce Trail
 - Regional loops w/ Southern Bruce Peninsula and beyond
 - · Waterfront Trust Cycling Route
- Cabot Head (anticipated re-opening summer of 2019)
- · Cove Island private investment?
- Indigenous Tourism
- Parks' Yurts
- Cape Croker
- Hope Bay
- · Devil's Monument
- Black Creek
- · Trails out of Lion's Head
- Dark Skies
- Flora & Fauna
- Pedestrian zone downtown Tobermory
- Sustainable transportation golf cart and/or horse and carriage on gravel road up to Cabot Head
- Private land what will happen with this?

Package Development:

- · Guided / educational tours
- · Some suppliers willing to help drive packaging
- · Regional tours South Bruce Peninsula / Wiarton

3. Seasonality

- Shoulder season extension has both positive and negative effects (growing visitor interest, but lack of services)
- There are mixed feelings about a shoulder / winter offerings
 - Concerns:
 - · Weather uncertainty
 - · Workforce / workload
 - · Opportunities:
 - Some companies willing to champion seasonal offerings
 - Parks apparently have equipment (snowshoes etc.) from a previous initiative
 - · Parks Yurts are winterized but awaiting approval
 - Availability for staffhousing
 - · Lion's Head does keep services open
 - · Some trails would require minimal upgrades
- Many businesses only want to open for the peak summer season

4. Visitor Experience

- Frustration with visitor behaviours and # of visitors
- · Lack of services available
 - · Amenities / activities
- · Opening hours
- Many visitors are looking for waterfront access and picnic areas
- Many low cost or free experiences low financial impacts
- Need to educate / facilitate appreciation with visitors

5. Private / Business Investment

- Need more private investment
- · Need a business incubator / entrepreneurs
- Need to promote sustainable tourism practices / sustainable businesses
- Businesses need to understand Parks Canada sustainability mandates

Situational Analysis - Summary Themes, cont'd

6. Tourism Governance / Management

- · Progress has been made with Parks and some municipal initiatives (parking)
- · Can't be led by municipality alone
- Private sector should be more involved
- · Historical lack of collaboration / concerted political will

7. Workforce Challenges

- · Lack of accommodations
 - · Some suppliers have staff housing and/or subsidized housing
- Trouble getting work during shoulder season/winter
- · Some private housing options had been proposed but not approved
- Fewer young people residing in region

Other observations:

- Lack of data
- · Obvious divide between Tobermory and Lion's Head
- Lack of collaboration between organizations and regions (i.e., South Bruce Peninsula)
- Divide between year-round residents and seasonal cottagers
- Local residents are being displaced / competing for services during peak summer season
- · Some locals do not want to see change
- · Dispersal is desirable, but other sites in region need development
- Saugeen Ojibway First Nation is impacted by overflow of tourism; want to support management; also interested in sustainable tourism development

Visitor Management Framework - Indicators & Data Sources for Northern Bruce Peninsula

ZONE	MOST	CONCERNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
BRUCEPENINSULA NATIONAL PARK	Environmental	Vegetation trampling and soil compaction along trails and at key destinations in the park	Total non-natural barren area along trails and at keydestinations	Parks Canada trail inventory and assessment
		Human / wildlife conflicts	Number of annual reported human / wildlife conflicts	Park Warden responses / reports
		Trail braiding, widening and social trail creation	Total length of trailwidening and social trail creation	Parks Canada trail inventory and assessment
		Growing litter and increased municipal solid waste generation	Number of annual incidents of littering per visitor Estimated total kilograms of solid waste produced in the park Estimated intensity (kg) of solid waste produced in the parkper visitor	Parks Canada staff survey Parks Canada waste disposal records Visitor counts
		Damage to and removal of natural and cultural resources	Number of direct observations by staff per visitor Number of charges laid by Park Wardens	Parks Canada staff inventory Visitor counts Park Warden responses / reports

ZONE	MOST	CONCERNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
BRUCE PENINSULA NATIONAL PARK	Social / Cultural	Increasing traffic and parking congestion	Number of peak seasondays parking is at capacity Number of parking permits issued	Parking statistics
		Vandalism	Number of direct observations by staff per visitor Number of charges laid by Park Wardens	Parks Canada staff inventory Visitor counts Park Warden responses / reports
	Visitor Experience	Unmet visitor expectations as visitors can't access major attractions in the park (e.g., Grotto) due to limited parking access / capacity	Percent of visitors satisfied or very satisfied with their experience in the park	Visitor survey
		Reduced experience due to perceived crowding at key destinations during peak season (e.g., Grotto)	Percent of visitors who reported experiencing crowding while in the park	Visitor survey

ZONE	MOST	CONCERNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET									
FATHOM FIVE	Environmental	Vegetation trampling, soil compaction	Total non-natural barren area	Parks Canada trail inventory									
NATIONAL MARINE CONSERVATI ON AREA	CONSERVATI	and riparian damage along shorelines and at key destinations such as Flower Pot island	along trails and at keydestinations	and assessment									
		Human / wildlife conflicts	Number of annual reported human / wildlife conflicts	Park Warden responses / reports									
		Trail braiding, widening and social trail creation	Total length of trail widening and social trail creation	Parks Canada trail inventory and assessment									
		Growing litter (terrestrial &marine) and increased garbage generation	Number of annual incidents of littering per visitor	Parks Canada staff survey									
			Estimated total kilograms of solid	Parks Canada waste disposal records									
			waste produced in the park	Visitor counts									
			Estimated intensity (kg) of solid waste in the park pervisitor										
												Reduction in water quality	Number of days fecal coliform counts at local beaches exceed health thresholds during peakand shoulder seasons
		Emissions from tours boats creating air quality, smell and climate change	Total fuel consumed by tours boats	Fuel consumption records from operators									
		concerns	Total emission equivalents by tour boats	Emission coefficients from literature									
			Air quality readings	Air quality study / report									
			Number of unique complaints	Municipal registry									
		Damage to and removal of natural and cultural resources	Number of direct observations by staff per visitor	Parks Canada staff inventory									
			·	Visitor counts 78									
			Number of charges laid by Park Wardens	Park Warden responses / reports									

ZONE	MOST	CONCERNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
FATHOM FIVE NATIONAL MARINE CONSERVATI ON AREA	Social / Cultural	Noise from tour boats (e.g., engines & microphones) on Big Tub Harbour disturbing residents on Big Tub Road	Number of unique complaints per vessel in the harbour	Municipal registry of complaints Number of vessel trips by operators into the harbour
		Tour boat traffic creating crowding for other recreational vessels travelling in Big Tub Harbour	Number of unique complaints	Municipal registry of complaints
		Visual quality impacts as increased tour boat traffic reduces the quality of the views for residents along BigTub Road	Number of unique complaints	Municipal registry of complaints
	Visitor Experience	Vandalism	Number of direct observations by staff per visitor Number of charges laid by Park Wardens	Parks Canada staff inventory Visitor counts Park Warden responses / reports
		Reduced experience due to perceived crowding at key destinations during peak season (e.g., Flower Pot Island)	Percent of visitors who reported experiencing crowding while in the park	Visitor survey
		Unmet visitor expectations as visitors can't access major attractions in the park (e.g., Flower Pot Island) due to limited access	Percent of visitors satisfied or very satisfied with their experience in the park	Visitor survey
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ZONE	MOST CO	NCERNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
DOWNTOWN – Tobermory & Lion's Head	Environmental	Habitat fragmentation and / or loss	Total gross floor area allocated to tourism in the region	Municipal building permits and metrics
пеац		Growing litter and increased municipal solid waste generation	Estimated total kilograms of municipal solid waste produced by tourism sector (focus on accommodations & food / beverage) annually Estimated intensity (kg) of municipal solid waste produced by tourism sector (focus on accommodations & food / beverage) per visitor per night Percent of tourism operators implementing programs to minimize solid waste production and divert solid waste from landfill	Waste collection statistics from waste collection provider or actual reported waste production by operators Total number of visitor nights Industry survey - verified
		Growing water consumption	Estimated total water consumed, directly and indirectly, annually Estimated intensity of water consumed per visitor per night Percent of tourism operators implementing programs to reduce water consumption	Water consumption rates by tourism industry Water consumption rates, number of visitornights Industry survey - verified
		Energy consumption	Estimated total annual energy consumed by tourism industry directly and indirectly Estimated intensity of energy consumed per visitor pernight	Energy consumption by tourism operators Energy consumption and number of visitor nights

ZONE	MOST CONCE	RNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
DOWNTOWN – Tobermory & Lion's Head	Environmental cont'd	Air emissions & climate change	Estimated total annual direct and indirect CO2 emission from tourism (transportation, accommodations, attractions, food and beverages, marketing and sales, and shopping and services) Intensity of CO2 emissions per visitor per night Percent of tourism operators implementing programs to improve energy efficiency and reduce emissions Percent of tourism operators transitioning away from fossil fuel consumption to renewal energy Percent of tourism operators off-setting carbon emissions	Energy consumption and CO2 equivalent ratios Energy consumption, CO2 equivalent rations and number of visitor nights Industry survey - verified Industry survey - verified Industry survey - verified
	Social/ Cultural	Lack of parking and competition between locals and visitors for parking Growing vehicular traffic congestion and wait times Increasing capital and operational costs to manage visitor impacts or develop visitor infrastructure may increase taxation or reduce current spending on existing	Percent of park capacity consumed during peak season Number of parking complaints by residents Traffic volumes on primary roads Capital budget spent on capital developments required to address tourism Operational budget increase due to tourism	Municipal parking meter statistics Municipal registry of complaints Traffic counts Annual municipal capital & operational budgets

ZONE	MOST COM	NCERNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
DOWNTOWN – Tobermory & Lion's Head	Social / Cultural cont'd	Criminal & nuisance behaviours by visitors are creating conflicts with local residence (e.g., noise, disrespectful interactions, trespass)	Percent of residents satisfied or very satisfied with the quality of life in the region Percent of residents who are supportive of tourism Percent of residents reporting conflicts with tourists Number of tourist crimes / charges Number of noise complaints due to tourism events / tourist behaviours	Resident survey Local police reports Municipal bylaw reports

ZONE	MOST CONCE	RNINGREPORTEDIMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
DOWNTOWN – Tobermory & Lion's Head	Visitor Experience	Unmet visitor expectations as visitors can't find accommodations	Percent of visitors satisfied or very satisfied with their experience in the region Percent of visitors indicating their experience matched or exceed their expectations Percent of visitors satisfied with the quality of tourism attractions in the region Percent of visitors satisfied with the tourism activities available in the region Percent of visitors satisfied with the accommodations in the region Percent of visitors satisfied with their ability to access the region Percent of visitors who reported experiencing crowding while in the region Net Promoter Score – Percent of respondents categorized as "promoters" Occupancy rates Percent of visitors to the region that are repeat visitors	Visitor survey Local / regional lodging association occupancy statistics
		Lack of staff accommodations resulting in staffing shortages and reduced visitors servicing	Ratio of staff accommodations to visitor accommodations	Industry survey

ZONE	MOST CONCE	RNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
RURAL	Environmental	Habitat fragmentation and/ or loss	Total gross floor area allocated to tourism in the region	Municipal building permits and metrics
		Trail braiding, widening and social trail creation	Total length of trail widening and social trail creation	Municipal trail inventory and assessment
		Growing litter and increased municipal solid waste generation	Estimated total kilograms of municipal solid waste produced by tourism sector (focus on accommodations & food / beverage) annually Estimated intensity (kg) of municipal solid waste produced by tourism sector (focus on accommodations & food / beverage) per visitor per night Percent of tourism operators implementing programs to minimize solid waste production and divert solid waste from landfill	Waste collection statistics from waste collection provider or actual reported waste production by operators Total number of visitor nights Industry survey - verified
		Vegetation trampling, soil compaction and riparian damage along shorelines and at key destinations such as Flower Pot island	Total non-natural barren area along trails and at key destinations	Municipal trail inventory and assessment

ZONE	MOST CONCE	RNING REPORTED IMPACTS	EXAMPLE INDICATOR	EXAMPLE DATASET
RURAL	Social / Cultural	Lack of parking and competition between locals and visitors for parking	Percent of park capacity consumed during peak season Number of parking complaints by residents	Municipal parking meter statistics Municipal registry of complaints
		Growing vehicular traffic congestion and wait times	Traffic volumes on primary roads	Traffic counts
		Criminal & nuisance behaviours by visitors are creating conflicts with local residence (e.g., noise, disrespectful interactions, trespass)	Percent of residents satisfied or very satisfied with the quality of life in the region Percent of residents who are supportive of tourism Percent of residents reporting conflicts with tourists Number of tourist crimes / charges Number of noise complaints due to tourism	Resident survey Local police reports Municipal bylaw reports
HIGHWAYS	Environmental	Wildlife, including species at risk, mortality due to vehicular collisions	events / tourist behaviours Total annual number of recorded wildlife mortality incidents and intensity per kilometre of highway	Provincial and municipal transportation reports.
	Social / Cultural	Motor vehicle collisions & emergencies	Number of public safety / emergency response incidents involving tourists Number of motor vehicle incidents involving non-residents	Local fire department / ambulance / transportation and / or police records
		Unsafe driving practices (e.g., speeding, road rage)	Number of speeding violations issued to non- residents and average speeds above posted limits	Local police reports
		Increasing travel and highway wait times	Percent of visitors arriving to the region via a personal vehicle versus alternative transportation	Visitor intercept survey 85

ZONE	MOST	CONCERNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
BRUCE PENINSULA NATIONAL PARK	PENINSULA	Vegetation trampling and soil compaction along trails and at key destinations in the park	Spatial & temporal trail closures Trail reclamation Enforcement	Visitor education (e.g., Leave No Trace) Trail re-routing & upgrades
		Human / wildlife conflicts	Increased enforcement	Visitor education (e.g., Leave No Trace) Wildlife proof waste receptacles Habitat modifications (e.g., natural food attractant control)
		Trail braiding, widening and social trail creation	Spatial & temporal trail closures Trail reclamation Increased enforcement	Visitor education (e.g., Leave No Trace) Trail re-routing & upgrades
		Growing litter and increased municipal solid waste generation	Increased enforcement	Visitor education (e.g., Leave No Trace, promotion of recycling) Waste & Recycling Receptacles
		Damage to and removal of natural and cultural resources	Increased enforcement	Visitor education (e.g., Leave No Trace, promotion of recycling) Re-routing trails and infrastructure to limit visitor interaction with sensitive resources Off-site interpretation rather that on 86 site

ZONE	MOST CO	NCERNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
BRUCE PENINSULA NATIONAL PARK	Social / Cultural	Increasing traffic and parking congestion	Visitor permitting and carrying capacities	Visitor education about alternative transportation options Establish new shared transportation services to the park
		Vandalism	Increased enforcement	Visitor education (e.g., Leave No Trace, promotion of recycling)
	Visitor Experience	Unmet visitor expectations asvisitors can't access major attractions in the park (e.g., Grotto) due to limited parking access/ capacity	Visitor permitting and carrying capacities	Enhance parking supply Visitor education about alternative transportation options Establish new shared transportation services to the park
		Reduced experience due to perceived crowding at key destinations during peak season (e.g., Grotto)	Visitor permitting and carrying capacities Implement zoning based on the Recreation Opportunity Spectrum and set maximum daily peak time visitation numbers for each zone. Enforce maximums	Promotion & incentivize of non-peak season visitation (aka distribute visitation) Create and promote new / other attractions to draw visitors too Educate visitors about the volume of visitation in peak season so they can self select the optimal season

ZONE	MOST CONCERNING REPORTED IMPACTS		EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY		
FATHOM FIVE NATIONAL MARINE CONSERVATION AREA	NATIONAL MARINE	Environmental	Vegetation trampling, soil compaction and riparian damage along shorelines and at key destinations such as Flower Pot island	Spatial & temporal trail closures Trail reclamation Enforcement	Visitor education (e.g., Leave No Trace) Trail re-routing & upgrades	
		Human / wildlife conflicts	Increased enforcement	Visitor education (e.g., Leave No Trace) Wildlife proof waste receptacles Habitat modifications (e.g., natural food attractant control)		
		Trail braiding, widening and social trail creation	Spatial & temporal trail closures Trail reclamation Increased enforcement	Visitor education (e.g., Leave No Trace) Trail re-routing & upgrades		
					Growing litter (terrestrial & marine) and increased garbage generation	Increased enforcement
		Reduction in water quality	Regulate discharges from recreational vessels and tour boats Increased enforcement	Visitor education (e.g., Leave No Trace) Operator Education		
		Emissions from tours boatscreating air quality, smell and climate change concerns	Regulate emissions within NMCA Regulate / require more eco- friendly technologies as part of NMCA business permits	Market eco-friendly operators to visitors Educate operators about new engine technologies Incentivize utilization of new engine / vessel technologies		
	Damage to and removal of natural and cultural resources	Increased enforcement	Visitor education (e.g., Leave No Trace, promotion of recycling) Re-routing trails and infrastructure to limit visitor interaction with sensitive resources 88 Off-site interpretation rather that on-site			

ZONE	MOST CONCERNING REPORTED IMPACTS		EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
FATHOM FIVE NATIONAL MARINE CONSERVATI ON AREA	TIONAL MARINE Cultural ONSERVATI	Noise from tour boats (e.g., engines & microphones) on Big Tub Harbour disturbing residents on Big Tub Road	Regulate noise emissions within NMCA Regulate / require more less noisy operations (e.g., no microphones, quieter engines) as part of NMCA business permits	Market socially friendly operators to visitors Educate operators about alternatives Incentivize utilization of alternatives
		Tour boat traffic creating crowding for other recreational vessels travelling in Big Tub Harbour	Regulate total number of tour operator visits within the harbour Establish a set schedule of times and number of vessels tours operators are permitted visit the harbour	Operator education Visitor education — recreational boaters/ paddlers
	Visual quality impacts as increased tour boat traffic reduces the quality of the views for residents along BigTub Road	Regulate total number of tour operator visits within the harbour Establish a set schedule of times and number of vessels tours operators are permitted visit the harbour	Educate residents on the value of tourism	
		Vandalism	Increased enforcement	Visitor education (e.g., Leave No Trace, promotion of recycling)

ZONE	MOST	CONCERNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
FATHOM FIVE NATIONAL MARINE CONSERVATION AREA	Visitor Experience	Reduced experience due to perceived crowding at key destinations during peak season (e.g., Flower Pot Island)	Implement zoning based on the Recreation Opportunity Spectrum and set maximum daily peaktime visitation numbers for eachzone. Enforce maximums Visitor permitting and carrying capacities	Develop infrastructure to accommodate additional visitation Promotion & incentivize of non-speak season visitation (aka distribute visitation) Create and promote new/other attractions to draw visitors too Educate visitors about the volume of visitation in peak season so they can self select the optimal season
		Unmet visitor expectations as visitors can't access major attractions in the park (e.g., Flower Pot Island) due to limited access	Visitor permitting and carrying capacities	Enhance parking supply Visitor education about alternative transportation options Establish new shared transportation services to the park

ZONE	MOST CONCE	RNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
DOWNTOWN – Tobermory & Lion's Head	Tobermory & Lion's	Habitat fragmentation and / or loss	Develop / implement land use bylaws and municipal plans to protect important ecological areas	Educate tourism developers on low-impact development techniques Incentivize brown field development/ redevelopment and densification. Develop sensitively sited and appropriate infrastructure that attracts visitors away from critical habitats.
		Growing litter and increased municipal solid waste generation.	Increased enforcement Pass bylaws prohibiting singleuse plastics	Develop and apply education and incentive programs to help tourism industry and operators apply strategies to reduce solid waste production (e.g., soap dispensers, multi-day use of linens etc.). Develop and apply visitor education program to encourage visitors to minimize consumption and promote recycling. Distribute local recycling bins in public areas (e.g., parks, downtown cores etc.) to make waste diversion easy. Set up donation programs for used linens, towels, blankets, electronics, equipment etc. to local charities, schools and other organizations. Set up un-used food collection programs with local charities and food scrap collection program with local farmers

ZONE	MOST CON	ICERNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
DOWNTOWN – Tobermory & Lion's Head	Environmental cont'd	Growing water consumption.		Visitor education (e.g., promotion of recycling in accommodations and attractions) Source products with minimal excess packaging Better distribution of waste & recycling receptacles
		Energy consumption		Develop and implement education and incentive programs to help tourism industry and operators apply strategies to reduce energy consumption Develop and apply visitor education program to encourage visitors to minimize consumption and promote alternative and shared transportation options Promote eco-friendly businesses to visitors Implement a tourism industry energy conservation and monitoring program

ZONE	MOST CONCE	RNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
DOWNTOWN – Tobermory & Lion's Head	Environmental cont'd	Air emissions & climate change		Develop and implement education and incentive programs to help tourism industry and operators apply strategies to reduceenergy consumption
				Develop and apply visitor education program to encourage visitors to minimize consumption and promote alternative and shared transportation options Promote eco-friendly businesses to visitor
				Implement a tourism industry energy conservation and monitoring program
	Social / Cultural	Lack of parking and competition between locals and visitors for parking	Alter parking bylaws to discourage lengthy parking and increase enforcement of parking bylaws	Provide parking areas outside of the core areas in the region and promote visitors to park there. Provide alternative transportation choices (e.g., pathway, transit) to move visitors from parking areas to
		Growing vehicular traffic congestion and wait times	Expand traffic capacity and roadway conditions Develop infrastructure to enable alternative transportation options	attractions / community cores Educate visitors about and promote alternative and shared transportation options Incentivize and support the development of shared- transportation businesses

ZONE	MOST COM	NCERNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
DOWNTOWN – Tobermory & Lion's Head	Social / Cultural cont'd	Increasing capital and operational costs to manage visitor impacts or develop visitor infrastructure (e.g., parking lots) may increase taxation or reduce current spending on existing infrastructure / operations		Undertake detailed study and evaluation to ensureany capital and operational budget enhancements are essential and will result in net improvement for tourism and local quality of life
		Criminal & nuisance behaviours by visitors are creating conflicts with local residence (e.g., noise, disrespectful interactions, trespass)	Increase enforcement presence in problem areas during known problem periods	Prepare and market a visitor code of conduct to be followed when visiting the region
	Visitor Experience	Unmet visitor expectations as visitors can't find accommodations	Expand the supply of traditional and sharing economy accommodations	Develop tools to make it easy for visitors to find available accommodations
		Lack of staff accommodations resulting in staffing shortages and reduced visitors servicing	Establish and require, as part of land use bylaws, that appropriate staff housing to visitor accommodation ratios be followed	
				94

ZONE	MOST CONCERNING REPORTED IMPACTS		EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEME NT STRATEGY
RURAL	Environmental	Habitat fragmentation and / or loss	Develop / implement land use bylaws and municipal plans to protect important ecological areas	Educate tourism developers on low- impact development techniques Incentivize brown field development / redevelopment and densification Developed sensitively sited and appropriate infrastructure that attracts visitors away from critical habitats
		Trail braiding, widening and social trail creation	Spatial & temporal trail closures Trail reclamation Increased enforcement	Visitor education (e.g., Leave No Trace) Trail re-routing & upgrades

ZONE	MOST CONCE	RNING REPORTED IMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
RURAL	Environmental cont'd	Growing litter and increased municipal solid waste generation	Increased enforcement Pass bylaws prohibiting single-use plastics	Develop and apply education and incentive programs to help tourism industry and operators apply strategies to reduce solid waste production (e.g., soap dispensers, multi-day use of linens etc.) Develop and apply visitor education program to encourage visitors to minimize consumption and promote recycling Distribute local recycling bins in public areas (e.g., parks, downtown cores etc.) to make waste diversion easy Set up donation programs for used linens, towels, blankets, electronics, equipment etc. to local charities, schools and other organizations Set up un-used food collection programs with local charities and food scrap collection program with localfarmers
		Vegetation trampling, soil compaction and riparian damage along shorelines and at key destinations such as Flower Pot Island	Spatial & temporal trail closures Trail reclamation Enforcement	Visitor education (e.g., Leave No Trace) Trail re-routing & upgrades

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ZONE	MOST CONCE	RNINGREPORTEDIMPACTS	EXAMPLE DIRECT MANAGEMENT STRATEGY	EXAMPLE INDIRECT MANAGEMENT STRATEGY
RURAL	RURAL Social / Cultural	Lack of parking and competition between locals and visitors for parking	Alter parking bylaws to discourage lengthy parking and increase enforcement of parking bylaws	Provide parking areas outside of the core areas in the region and promote visitors to park there. Provide alternative transportation choices (e.g., pathway, transit) to move visitors from parking areas to attractions / community cores
		Growing vehicular traffic congestion and wait times	Expand traffic capacity and highway conditions Develop infrastructure to enable alternative transportation options	Educate visitors about and promote alternative and shared transportation options Incentivize and support the development of shared-transportation businesses
	Criminal & nuisance behaviours by visitors are creating conflicts with local residence (e.g., noise, disrespectful interactions, trespass)	Increase enforcement presence in problem areas during known problem periods	Prepare and market a visitor code of conduct to be followed when visiting the region	
HIGHWAYS	Environmental	Wildlife, including species at risk, mortality due to vehicular collisions	Undertake infrastructure enhancements or alterations to minimize potential for wildlife to be on the highways	Educate motorists Reduced speed zones
	Social / Cultural	Motor vehicle collisions & emergencies	Increased enforcement during peak season	Education program for motorists
		Unsafe driving practices (e.g., speeding, road rage)	Increased enforcement during peak season	Education program for motorists
		Growing travel and highway wait times	Expand traffic capacity and highway conditions	Educate visitors about and promote alternative and shared transportation options 97

Tourism Asset Inventory - Northern Bruce Peninsula

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Criteria – Business Ready, Visitor Ready & Sustainability Ready

Business Ready	Visitor Ready	Sustainability Ready
		Definition
target market (as identified in the strategy).	NBPS target market (asidentified in the strategy) through cultural and educational experiences. This asset works with and/or should consider working with the international market. Note that the Business and Visitor Readycriteria are cumulative (i.e. the Visitor	The asset provides experiences consistent with NBP'starget market and proactively plans to adapt to future needs. There is sufficient evidence that legitimate steps are being taken to improve the assets impact on the local community and/or natural environment. Note that the Sustainability Ready
	, , , , , , , , , , , , , , , , , , , ,	criteria stand alone at this point as operational sustainability is always relevant and should always be considered in the spirit of continuous improvement.

Note: The purpose of the criteria is to position the operator to attract a better suited tourist for NEP (adventure traveler, hiker, culture seeker, etc.) while also considering the environment and local community. The TAGwill need to determine how best to use this tool –it could potentially be used for operator self-essessment, as the basis for further training/workshops on criteria and how to advance, as the basis for assessing/which assests meet each level and might be suitable candidates for parkage development initiatives or other inscribers. The criteria agains less to all assesses even though requirements may avay accorded as a Y/N a good threshold would be meeting 70% of the requirements for each category (bold subsections of each list).

Criteria		ia	Criteria
Business Operations and Planning		s Operations and Planning	Business Operations and Planning
Been in business for 1+ years		business for 1+ years with a proven track record of safe operations and a visitor experience	Have membership, support and/or training through local sustainability or other organizations (e.g. BPBA)
Have all required licenses and permits in place (i.e. business licence, health & safety, insurance etc.)	Havean	mission and/or vision statement that aligns with NBP's strategy	Communicate with and address concerns from local residents, SCNand business community
Have a published pricing and cancellation policy in place	Haveah	numan resource plan in place	Have a code of conduct/ ethics including cultural, environmental and indigenous issues
Maintain a staffed business location (if applicable) and clearly advertise a set schedule of operating hours	Haveas	staff accommodation plan in place (if relevant)	Have succession plan for management and employees
Able to accept various payment forms		onsistent and posted operating hours that extend into the evenings and ds during peak season and extend beyond the peak months	Provide living wage and benefits to employees
Able to accept reservations via phone, email, website or reservation system		product packaging and/or cross marketing of at least 3 other NBP ons and services that can extend stay, expenditure and diversity of noe	Evidence of sustainability considerations in planning documents
Participate in regional tourism meetings, training and workshops	Comme	r of relevant industry organizations/associations (i.e. Chamber of erce, Tourism Industry Association of Ontario, or Ontario Restaurant Hotel tel Association)	Evidence of action to lower footprint (i.e. monitoring of utility consumption and waste production appropriate for business size)
Visitor Information and Promotion		Information and Promotion	Have a sustainable sourcing plan in place (i.e. fair trade coffee, EatLocal Grey Bruce)
Able to be contacted by phone, website and/or email so visitor can leave a message at anytime	Actively	v encourage feedback from guests and respond to concerns	Have dedicated efforts for assessing and managing environmental risks and impacts (including climate risks)
Return messages by end of business day for high season, within 48 hours during low season, and have an automated greeting if closed for season		provided with an outline of the experience, cultural/environmental unce, visitor expectations, and preparation tips ahead of arrival	Visitor Information and Promotion
Have the ability to provide visitors with information ahead of arrival	Have a v market	website that creates an image of the destination consistent with NBP's target	Possess standards, certifications, or awards from third-party organizations related to sustainability (i.e. community support, environmental performance, etc.)
Able to communicate year-round with visitors		high quality digital marketing campaign in place that targets interest groups t to NBPstarget market (i.e. adventure travelers, hikers, culture seekers)	Visitor Experience & Sense of Place
Have a functioning website with hours, rates, locations, directions	Visitor I	Experience & Sense of Place	Encourage visitors to reduce consumption and waste, reduce environmental impacts, and/or greenalternatives
Listed on external website(s) (i.e. TripAdvisor,Yelp, Hostelworld)	Provide	products and experiences that align with NBPstarget market	Take measures to reduce impact on surrounding land and biodiversity (i.e. plant native species, reduce paved area, installbird-feeders)
Have promotional materials with prices, operating hours, dates and contact information	Havean	established logo and brand consistent with attracting NBPs target market	Long-term planning for maintenance, expansion and product development for visitor increase (i.e. washrooms, parkingetc.)
Have appropriate translated materials if relevant (e.g. French, Mandarin)		strate ability to adapt to market trends (i.e. interest in aboriginal tourism, bility, sustainability)	Include Indigenous interpretations and /or local cultural content in signage and promotional materials
Visitor Experience & Sense of Place		F-peak season activities or services (i.e. snow activities as well as suggested r hikes, bikingtrails)	Indigenous Cultural Tourism AssetsONLY
Have adequate branded signage onsite Have appropriate infrastructure in place for current visitation (i.e. washrooms, parking, accessibility requirements) or have clear information on where these amenities can be accessed within reasonable distance			Indigenous cultural content follows local protocols Indigenous tourism business owned by a) majority indigenous people b) majority owned indigenous companies c) indigenous-controlled organizations
Provide information about the area, surroundings, visitor preparation and acceptable behaviours upon arrival			Indigenous-focused educational background provided to guests before and during visit
Beable to collect feedback via guestbooks, online reviews etc.			Have accepted of the NBP Pledge and require all visitors to sign the Pledge (note that at this time there is not a 'pledge' although it is a recommendation)
Provide consistent products, services and experience to visitors / have appropriate trained in hospitality / customer service			,
Have a weather contingency plan in place including necessary cancellation / refund policies and alternate offerings when weather is unsuitable (if applicable)			_
Have accepted of the NBP Pledge and require all visitors to sign the Pledge (note that at this time there is not a 'pledge' although it is a recommendation)			

Ideas & Inspirations From the Community

On the following pages we've identified snippets/ideas/opinions that arose during the project from a variety of sources (the public, the steering committee, Sources of Knowledge, etc.) that we didn't want to lose and may be worthy of investigation/consideration moving forward. They are roughly organized by the headings below:

Planning

- Prepare visitors (signage, expectations setting in planning stages, etc.)
- Expectations setting flip flops, heels don't cut it, you need to bring water when you hike, here's how far a km is...
- · Need to intercept people early (SBPfor example) and let them know where there IScapacity
- Create experiences en route fine dining on bison farm (South Bruce Peninsula)
- Need interpretive centre (SON) around Wiarton before they get here and have to turn around (what's available on the entire peninsula; local
 artisans sell wares) like Banff and Cape Breton or Island of Orleans, PQ you go there first to get educated before embarking on travels,
 maybe make reservations from there?
- People need to book accommodation and tours/activities in advance before they leave Toronto
- Chamber calls around for accommodation availability which is immediately out of date; some electronic means of collecting this info in real-time (social media app or dashboard/report)
- Humorous orientation videos re what to wear, how to prepare
- · Better internal communications amongst front desk staff re where to send visitors that has capacity at that time
- Create a listing of organizations that operators may want to become members of both relevant industry organizations/associations as well as
 a list of available certifications e.g. GoGreen, Green Tourism checklist; consider creation of a tailored, local certification that is open
 sourced/free for all to use?
- Investigate the <u>Haliburton Community Coop</u> model that encourages, develops and supports entrepreneurial initiatives that contribute to the social, cultural, environmental and economic well-being of the County and its residents as a potential model to consolidate a number of existing local organizations with similar mandates, each with insufficient resources

Targeting/Messaging

 Great Lakes Waterfront Trust/Trail cycling route www.waterfronttrail.org – this initiative (running up the west coast of Lake Huron to Tobermory, over to Manitoulin and/or back down to Owen Sound and across to Collingwood (soon to be expanded to Simcoe County and around Georgian Bay) is an example of the kind of visitors that will be coming and that I think we DO want on the Bruce

Ideas & Inspirations cont'd

- Palau's Immigration stamp
- Fogo Island, Nfld economic nutrition labelling create a version indicating sustainability?
- Grow the season it used to be 10-12 weeks; then it dropped to 6 weeks and is slowly growing again (operators encouraging people to come back when it's less busy)
- Should incentives or tangible benefits be put on the table to encourage commitment to the switch to sustainable practices for the operators e.g. if operators are accredited with sustainable practices, they qualify for xyz

- The state of the s
- A high-end tour company (with on-board accommodations) has expressed interest in bringing high yield adventurers interested in caving, hiking, diving, stargazing, etc. to the area in spring and fall
- Stop marketing to the 'selfie sticks'
- Is it possible to dissuade visitation in peak hours, days, weeks through operator pricing schemes? i.e. make it very expensive to scuba, tour, etc. at peak times
- Incent creation of new or improved activities that will disperse visitors are operators aware of RTO7's Experience Development training programs/funds?
- Group of accommodators opt not to have your towels/sheets cleaned and for each day a visitor chooses to do this, \$X (in this case it was \$5) is donated by the accommodator to a charitable fund (but could be a fund for sustainability initiatives)

Transportation

- Interesting mobile apps roverparking.com and pitched.ca/cyclist perhaps not appropriate, but might offer some control
 if visitors are parking on residents' lawns, pitching tents, etc.)
- Restore the Wiarton train station to a tourist info centre
- Wiarton airport strategic plan visitor/interpretive centre

Ideas & Inspirations cont'd

- Werfenweng https://www.werfenweng.eu/EN/SAMO/Card/ alternative transport
- Peninsula Bruce Trail https://www.pbtc.ca/trail-angels Trail Angel Shuttle coordinator
- Shuttles from Wiarton
- Make the shuttle ride from the parking lot an experience in itself (a la Disney park in the giraffe lot, learn what to expect, etc. en route)
- · Require guides on tour buses
- Park at Ferndale and have a transit system
- Better use of Parkbus from Toronto in summer months; consider a bus from Owen Sound (so visitor could take Grey-Bruce Airport Bus or Greyhound from Toronto to Owen Sound and then carry on to Tobermory and after a few days take the ferry to Manitoulin)
- Consider using school buses (as in Muskoka) during the day (esp. in summer) for tourism purposes
- County consider installing electric vehicle charging stations and charge fee for use)

Infrastructure

- Opportunity to re-purpose the MTO car pull-off property at Crane R for First Nations guided canoe trips/Interpretive Centre
- Dyers Bay Rd and Hwy 6 lands as a Welcome Centre to capture tourists before they get too far north. There's a sizeable municipal parking lot at Dyers Bay where shuttle could take folks to the Cabot Head lighthouse; also reachable in 30 mins by bike if bikerentals available there
- Moore St. could you have people park at the high school (provide info there? Road might need bit of work to be safe?)
- Gunpoint Trail is pretty empty could take overflow from parking lot/room for development
- If there's a parking lot, does it need to be paved?
- More wayfinding and interpretive (etiquette, what to wear) signage required; QR codes for signage so don't have oversignage
- · Donation boxes to assist with sustainability effort
- Fluker posts to monitor environment http://www.flukerpost.com
- · Traffic circles or bumps and enforcement

Ideas & Inspirations cont'd

- · Move Tobermory grocery store out of downtown
- Make Tobermory a pedestrian downtown (park outside of town)
- Need places to eat outdoors; need a laundromat
- Fill local gaps? E.g. a pop-up drug store in Tobermory for July & August
- <u>GreenON Small and Medium Business Program</u> open to Tourism Businesses (May 1, 2018) no cost energy audits and GHG emissions assessments, recommendations for operational savings, efficiencies and emission reduction, financialincentives for capital retrofits and energy saving projects, support for the application process
- Investigate community-owned wind farm such as Gunn's Hill in Oxford County
- Look into capital funding for climate adaptation through FCM's Municipalities for Climate Innovation Program

Activities

- www.bruceskiclub.ca maintain winter trails
- Work with Nature Conservancy of Canada, Escarpment Biosphere Conservancy, Bruce Trail Conservancy, Ontario Nature to host guided tours of their lands (hike, bike, snowshoe); complement this with volunteer ambassador hikes
- · Issue/sell a trail permit (like a snowmobile permit) that gives you access to all trails
- Are helicopter tours appropriate (maybe for Niagara Falls but for here?) eliminate man-made attractions not consistent
 with sustainability; focus on eco-tourism offerings and those interested in that will come and others will
 (increasingly/gradually) not
- · More activities for 18-35 year olds; more for rainy days
- · Expand Friday night music; offer cooking classes
- Maybe there's additional incentive provided to those looking to develop sustainable experiences?
- · Host an RTO7 Experience Development 101 workshop (maybe through BPEG?) to brainstorm intangible cultural heritage

Bruce Peninsula National Park – Annual Visitation (2008 – 2017)

YEAR	BPNP - Total Annual Visitation (Person Visits)
2008	194,259
2009	216,313
2010	224,239
2011	244,139
2012	251,825
2013	283,831
2014	283,704
2015	320,287
2016	412,622
2017	428,987

Fathom Five National Marine Park Postal Code and PRIZM Analysis - 2014

Market Draw

Between May 17 and September 29 (2014), over 1,500 visitors provided their origin during a point of sale transaction at the Visitor Centre for Fathorn Five National Marine Park.

Of the records collected in 2014, 69% came from Canada, 6% from Europe, 5% from the United States and 20% were visiting from elsewhere in the world. Of these travellers, 75% were visiting the park for the first time.

Among Canadian visitors, the marine park attracts the majority of its visitors (95%) from within the province of Ontario. This trend is also evidenced in the draw from Canadian census metropolitan areas, which was lead in 2014 by Toronto (39% of Canadian records) and Kitchener (8%). Approximately two-thirds of Canadian visitors (64%) travelled between 220 and 280 km to visit the marine park.

In 2014, the marine park attracted American visitors from 19 U.S. states, with the highest numbers travelling from Michigan (38% of U.S. records), New York (13%) and California (6%).

Fathorn Five NMP currently appeals to both a more mature visitor and to families. With 63% of all visitor groups comprised of senior and/or adult groups and 37% of parties travelling with children.

Bruce Peninsula National Park Camper Analysis -2015



Place: Bruce Peninsula National Park

Field Unit: Georgian Bay and Ontario Fast

Period: April through October 2015

Source: PCRS System, camping reservations

Total Camping Records:

- All = 11,126
- Camping = 9,470
- . Backcountry = 1,108

Total Valid Records for Analysis:

- All = 10,809 (97%)
- Camping = 9,177 (97%)
- Backcountry = 1,095 (99%)

CANADA

Total Canadian Records: 10.171

Valid Postal Codes: 9,899

OTHER

US Records: 467

Overseas Records: 171

In 2015, Bruce Peninsula National Park (NP) had 11,126 camping records in the Parks Canada Reservation System. Approximately 85% (11,126) were associated with Bruce Peninsula campgrounds (C), while 10% (1,108) and 1% (548) were associated with Backcountry (BC) and other accommodation, respectively. On average, valid records reveal that 94% of all camping reservations were made by Canadians, 4% were American, 1% were made by Europeans and the rest were from elsewhere in the world.

With more than 9 in 10 (95%) Ontario was by far the largest market of Canadian campers, while Quebec (4%) and Alberta (1%) were the next largest markets. Considering the provincial influence it is no surprise to see Toronto (43%), Kitchener (9%), London (8%) and Hamilton (6%) were the main urban draws for the park campgrounds. Most campers (79%) drove between 200 and 300 kilometres to reach the park.

As for international campers, Bruce Peninsula NP campgrounds had camping reservations from 35 US states and 18 countries around the world. American residents from Michigan, New York, and Ohio were the most prominent US origins. Germany, Switzerland and France were the top international draws.

Explorer Quotient (EQ): Canadian campers to Bruce Peninsula NP are mainly Familiarity Seekers and Learners.

- Free Spirits were the most prominent EQsegment.
- · Cultural History Buffs and Cultural Explorers by proportion compared to the Canadian population.
- Most of the Learner EQsegments were high performers, while Gentle Explorers and Personal History Explorers were under-represented.

More on EQ:

https://www.destinationcanada.com/en/tools

Parks Canada - Bruce Peninsula National Park - 2016 Visitor Information Program (VIP) Findings

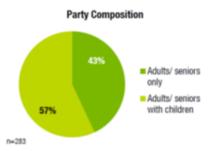
Performance Management Expectations Summary

70% of Bruce Peninsula NP visitors considered they had learned about the natural heritage of the park.

93% of Bruce Peninsula NP visitors are satisfied with their overall visit.

83% of Bruce Peninsula NP visitors consider the place meaningful to them.

97% of Bruce Peninsula NP visitors enjoyed their visit.



Key Findings

- Social media has increased significantly as a source of information that has made visitors aware of the park (2016=26% and in 2013=6%).
- Friends and family and the Parks Canada website are important trip planning tools for visitors.
- The majority of visitors were from Ontario.
- Two thirds of respondents stayed overnight in the local area (within 30km) of the park and spent, on average, 3 nights.
- The park's landscape and scenery was the most cited reason for what inspired people to visit.
- The vast majority of visitors enjoyed their visit to the park, recreational activities were among visitors most enjoyable experiences.
- Satisfaction with Parks Canada staff was rated high by visitors to the park.
- Picnic facilities were rated the lowest for satisfaction. Washroom cleanliness also received a lower rating and was mentioned by visitors in the open-ended comments.
- Visitors went to, on average, 3 different locations in the park over the course of their visit.
- On average, visitors used 4 different trails. The Georgian Bay Trail was used by 66% of visitors.
- The most important feature to visitors when hiking is a scenic lookout and the most important feature to visitors when picnicking is beautiful scenery.
- Showers, privacy and electricity were the top 3 camp site features most important to visitors.

About the Visitor

- •The majority of respondents were from Canada (91%), with 78% living in Ontario.
- •12% of all park respondents were from the census subdivision of Toronto (city of and not GTA).
- Adult/senior only parties represented 43% of all groups to Bruce Peninsula NP and had an
 average party size of 2.9 people. Parties travelling with children represented 57% of groups and had an average party size of 4.8
 people.

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Bruce Peninsula National Park - 2016 Visitor Information Program (VIP) Findings

About the Visitor's Trip

- Almost three quarters of respondents (73%) were visiting Bruce Peninsula NP for the first time
- The vast majority of respondents (96%) are planning their trip to Bruce Peninsula NP and for many (63%) it was the main destination of their trip.
- The vast majority of respondents (89%) did not live in the surrounding area of the park, and 33% of respondents camped in the park.
- While 19% of respondents did not spend any nights away from home while on their current trip, 41% spent between 1 and 3 nights. Those that did spend at least one night away, reported spending on average 6.3 nights away from home.
- Over half of respondents (54%) indicated they became aware of the park from "friends/ family", followed by "previous visit/ knowledge" (38%), social media (26%) and the Parks Canada website (24%).
- Respondents were asked to identify what inspired their visit to Bruce Peninsula National Park. The top three answers provided were related to the park's landscape (28%), the park's recreational opportunities (21%) or a recommendation (10%).

What inspired you to visit this park today...

"The scenic view."

"Pour voir les falaises et l'eau claire."

"Hiking at Singing Sands."

"Go camping for the first time."

"Online reviews, friends"

"Saw great views on Facebook"

"It's something we do every year"

"Proximity to Tobermory"

Select visitor comments

I enjoyed...
"Hiking Bruce Trail" "Lookout Tower and Grotto" "Seeing the cliffs."
"The Snake Hike" "Being Outside" "Being with friends"
"Cleanliness of Park" "Conversing with staff"

Select visitor comments

Bruce Peninsula National Park - 2016 Visitor Information Program (VIP) Findings

Places Visited

	Visited	avg hrs	Very satisfi	ed	%	No sa	t at all itisfied	
Places	%	visited	5	4	3	2	1	avg
Grotto	78	3.2	68	25	6	0	1	4.6
Visitor Centre	69	1.9	67	25	7	1	0	4.6
Singing Sands	57	2.4	36	20	18	14	12	3.6
Halfway Log Dump	56	3.4	71	20	8	1	0	4.6
Flowerpot Island	39	4.3	74	18	8	0	0	4.7
Little Cove*	23	1.9	-	-	-	-	-	-
Crane Lake*	4	-	-	-	-	-	-	-

Important When Camping

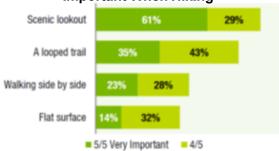
	2016
*Campsite Features (n = 185)	%
Showers	81
Privacy	73
Electricity	57
Flush toilets	42
Pull-through site	18
Yurt/ cabin	9
Dumping station	8

"Besnonses do not add to 100% respondents

Trails Used

		2016
Trails Used	Difficulty	%
Cyprus Lake:		
Georgian Bay Trail	M	66
Marr Lake Trail	D	31
Horse Lake Trail	M	38
Cyprus Lake Trail	M	38
Bruce Trail to Overhanging Point	VD	30
Bruce Trail to Stormhaven	VD	14
Visitor Centre:		
Tower to Dunks Bay Lookout	E	49
Burnt Point Loop	D	26
Singing Sands:		
Boardwalk Loop	E	39
Forest Beach Loop	M	27
Halfway Log Dump:		
Parking lot to shoreline	M	50

Important When Hiking



Bruce Peninsula National Park - 2016 Visitor Information Program (VIP) Findings

Visitor Origin

Ontario		78%
Toronto	12%	
Mississauga	4%	
London	3%	
Hamilton	3%	
Kitchener	2%	
Northern Bruce Peninsula	2%	
Milton	2%	
Brampton	1%	
Barrie	1%	
Vaughan	1%	
Guelph	1%	
Waterloo	1%	
Other cities/ towns	45%	
Québec		7%
Montréal	2%	
Other cities/ towns	5%	
Atlantic Canada		1%
Western and Northern Canada		1%
Other Canada*		4%
USA		5%
Other countries		4%
TOTAL		100%

USA Market Research, Perceptions and Recommendations for Indigenous Tourism

Authenticity is Key

USA TRAVELLERS TOLD US

- They prefer one-on-one interaction with Aboriginal people, in small, intimate groups
- They want to be actively involved in learning about cultures, traditions, arts, food, storytelling, and history.
- They would like to learn about your connection to your land, nature and the environment.
- They are interested in participating in adventure, both physical and mental.
- They are looking for unique experiences.

Interest is there, but Low Awareness

USA TRAVELLERS TOLD US

- There is an actively engaged segment of travellers in the US that is positively predisposed toward Aboriginal cultural experiences.
- Awareness and understanding of Aboriginal tourism in Canada is low.
- There is a lot of confusion over wording and definitions.

HOW YOU CAN MAKE THE MOST OF IT

- Be yourself, be authentic, and avoid 'staged' experiences.
- Find multiple ways your guests can interact with your staff, performance groups and knowledge keepers.
- Include land acknowledgements in your business and experience descriptions.
- When talking about your business, focus on what makes it unique and different.

HOW YOU CAN MAKE THE MOST OF IT

- Host visitors with the understanding that Americans are interested in Indigenous cultures, but do not necessarily understand us or have ever learned anything about our history and relationship with Canada.
- Clearly name your community or nation within your marketing descriptions - share your language if you like. Your visitors are interested in learning!

Indigenous Tourism

USA TRAVELLERS TOLD US

- US travellers believe that Aboriginal cultural experiences stand out from more typical travel experiences. They imagine that it could transform a vacation from ordinary to extraordinary.
- This type of travel is highly experiential and emotional, and is seen as providing the traveller with a different perspective on a destination as well as way of life.
- It is a personal experience rather than a mass-produced experience.

HOW YOU CAN MAKE THE MOST OF IT

 Visitors are seeking what is unique, what stands out, and what is 'new' in a destination focus on showcasing what you do best - keep it authentic, engaging, and extraordinary.

Canadian Differentiation

USA TRAVELLERS TOLD US

- US travellers consider their country to be highly commercialized.
- Impressions of Aboriginal tourism in the US are often negative. American travellers feel guilty about how the US has historically treated Aboriginal peoples in the past and continues to treat them today. For some, this contributes to a perception that Aboriginal people in the US may not truly be interested in interacting with tourists or sharing their culture with them.
- Americans sense that an Indigenous experience in Canada could be more authentic than in the US.
- US travellers do not have a good understanding of Canadian geography, however they are vaguely aware of Canada's size and regionality, and this typically works in Canada's favour in terms of differentiation.
- However, there is also a related impression that authentic Aboriginal tourism experiences can only be found in rural areas, and do not exist in cities.

HOW YOU CAN MAKE THE MOST OF IT

- Do not be afraid to share your community's story and historic relationships with Canada.
- Acknowledge that there are locations, information and stories which your community has decided are not to be shared; tell your visitors why.
- Authentic Indigenous tourism experiences do not live in the past. Indigenous people in Canada are young and vibrant, traditional and modern, and diverse across the country.

Strong and Compelling Positioning

USA TRAVELLERS TOLD US

- Positioning that focused on personal connections and unique experiences resonated best.
- Positioning experiences as more experiencefocused through suggesting that travellers will have an authentic experience like no other through being guided by Aboriginal people.
 An experience they couldn't find anywhere else.
- Positioning experiences as more interactionfocused through suggesting a personal and authentic connection between the traveller and the Aboriginal people to get closer to the culture and nature.

HOW YOU CAN MAKE THE MOST OF IT

- Use marketing photography which includes people doing your experiences.
- Highlight your knowledge keepers and storytellers by name - tell their story too!
- Embrace how Aboriginal culture is alive and well, and part of a modern society - the experiences are not 'stuck in the past'.

A personal and authentic connection

Indigenous Tourism - A National Perspective

Indigenous tourism offers experiences that fulfills current and emerging consumer demand and has been identified as an emerging sector in the tourism industry with great potential to help differentiate the Canadian and regional tourism industries. To do this, the tourism industry, governments and associations at all levels (federal, provincial and local) must work to develop and market Indigenous tourism in Canada.

Key Markets

Based on the consolidation of results of three studies conducted by the Canadian Tourism Commission (now: Destination Canada) there are clear indications that conclude that Canada's position with respect to competitive advantage lies primarily in Europe (especially France and Germany) and North America (USA, Canada and Mexico). Asia is an identified market; however, demand is tempered by more competitive and proximate opportunities provided by Indigenous tourism businesses in Australia and New Zealand.

How to increase Indigenous Tourism Opportunities

- Improve competitiveness through enhanced business development, such as enhancing market and export readiness through improved product quality experiences.
- Develop partnerships with mainstream tourism businesses/associations and develop a network of Indigenous tourism businesses.
- Offer training and development programs for the Indigenous tourism workforce, such as customer service training, industry knowledge, cultural protocols, and leadership and business management training.
- Increase presence at transportation gateways, such as airports and major roads.
- Improve Indigenous tourism experiences to fulfill consumer demand. This can be through enhanced product development, by increasing the offering of authentic cultural experiences that involve learning, are experiential, and promote visitor immersion and engagement.
- Enhance livelihood for Indigenous tourism businesses and local tourism economies by building support from local communities, and establishing strong Indigenous tourism industry associations supported with resources for operating, product development, marketing and execution.
- Increase demand for Indigenous tourism experiences through marketing activities that raise awareness of Canada's Indigenous tourism experiences.

Indigenous Tourism Opportunities

Indigenous tourism opportunities are normally sought out while on trips, as opposed to during the pre-trip destination selection process.

Tips to Success

- 1. Develop business operating skills, especially how manage finances.
- 2. Plan for the future, understand tourism impacts on the community and culture, engage the community in planning and operations.
- 3. Exercise leadership and vision getting involved with tourism organizations and groups, sharing your knowledge, ideas and skills.
- 4. Know your strengths, and shortfalls. Shortfalls can be minimized through planning and working with others.
- 5. Involve your community. They can be help in planning, ideas, and employment.
- 6. Partner and connect with the tourism industry through networking events, committees, boards, memberships, and working together.
- 7. Understand that tourism is stronger when everyone works together visitors buy a destination, not often a single business.
- 8. Operate with consistent cultural values and principles, such as fairness, consistency, respect, conservation.
- 9. Take pride in and respect for culture, history, heritage and traditional ways.
- 10. Know tourism market readiness standards, and implementing them into business operations and pricing.

Indigenous Tourism in Ontario

Ontario experienced the highest number of trips of all provinces that included attending an Indigenous event (208,000) by Canadians. In the 1990's there were two Regional Indigenous Tourism Associations in Ontario: the Northern Ontario Native Tourism Association (NONTA), and Aboriginal Tourism Association of Southern Ontario (ATASO). They served the provinces 139 First Nations and over 300,000 Indigenous people. However, both organizations closed in early 2000 due to lack of funding. In April 2014, the creation of the Aboriginal Tourism Ontario (ATO) was announced, although there is much expressed interest from the Ontario Ministry of Tourism, ATO is not yet fully functional (2015) (now called Indigenous Tourism Ontario).

Ontario's presence in Indigenous tourism is substantial having the greatest number of Indigenous tourism businesses (479) which was 28% of all Indigenous tourism businesses in Canada. This was up from the 26% in 2001. The majority (469) were Indigenous owned, while 10 were Indigenous themed public (government-owned facilities). These businesses created total economic impacts of 14,044 jobs (full-time equivalent) equating to \$1.7 billion in output and \$957 million of GDP. Of this, \$497 million was paid in wages and salaries over \$63 million in tax revenue generated. Direct employment by these Indigenous owned tourism businesses was 11,108.

Three initiatives have continued to move Indigenous tourism forward in Ontario. These are: 1) in Ottawa, an urban Indigenous cultural attraction called *Aboriginal Experiences* that offers performances, foods, and coordinates a major festival; 2) headquartered on Manitoulin Island, the *Great Spirit Circle Tour* offers nature-based, cultural, eco-tourism, and educational tours; and 3) *Six Nations Tourism Association* (under Six Nations Economic Development) that promotes and facilitates tourism development in Six Nation traditional lands. In addition, the provincial tourism organization *Ontario Travel* has prominently featured Indigenous tourism on its landing page with a listing in the drop down page through "Play".

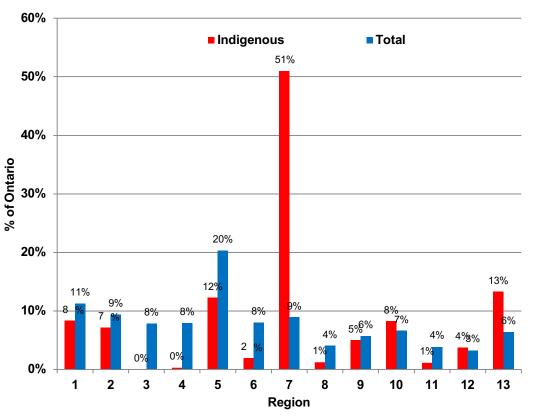
In 2010 the Ontario Tourism Marketing Partnership Corporation (OTMP) provided a summary of information about Canadians that included Indigenous events in their trips. Among a number of findings, Ontario experienced the highest (of all provinces) number of trips that included attending an Indigenous event (208K) by Canadians. This equals about one-third of all Indigenous event attendance in Canada.

Indigenous Tourism in Ontario

Afew Ontario studies on Indigenous tourism illuminated the Indigenous tourism visitor. A2012 study of Ontario's key markets (Ontario, Quebec, Manitoba and the US) found that only 2% of travellers experienced Indigenous culture while travelling that year. Virtually none of those travellers indicated it was the main reason for their trip. In 2014, the Great Spirit Trail Circle conducted a survey of Indigenous tourism businesses in northern Ontario. Key findings included:

- 67% of businesses believed receiving support from an Indigenous tourism association provides value.
- 91% believe they are NOT market ready, and only a small proportion believed they were ready to do business with national (16%) or international (11%) markets.
- About 22% of businesses fully understand the role of receptive tour operators, 44% replied they 'somewhat' understand the role.
- Under half (44%) of businesses were able to provide pricing and program details at least 6 months in advance.
- To become market-ready, businesses felt they needed the support in marketing (34%), finding qualified staff (31%), training and business development (30%) or other areas (4%).
- The majority of businesses are very small operators and employs 1-2 staff (48%) or 2-4 staff (9%), although 27% employed more than eight staff.
- About two-thirds (67%) of businesses have been operating for more than 5 years, 21% were 1-2 years old, while 12% were 3-5 years old.
- The top 5 challenges to being competitive were marketing/funding (21%), travel distances (15%), pricing (9%), services (9%), and skilled workforce (9%).
- Athird of businesses believed partnerships with other Indigenous businesses would help grow their business, while fewer believed partnerships with financing organizations (19%), marketing organizations (13%), and tour operators (9%) would help grow their business.
- The top 4 training and employment programs that would most benefit tourism businesses were customer service (24%), business supports (16%), management (11%) and heritage/land (11%).

Ontario Destination – Indigenous Visits by Region

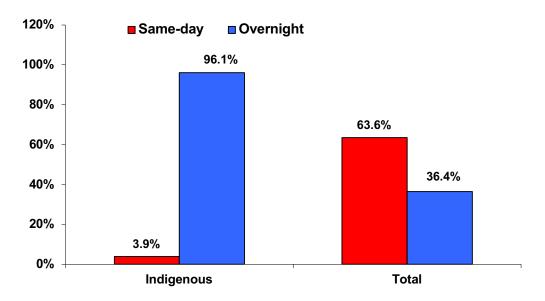


Destination Index		
74		
76		
0		
4		
60		
24		
<mark>574</mark>		
30		
87		
124		
29		
116		
207		

• 51% of Indigenous visits took place in Region 7 compared to 9% of total visits, 13% in Region 13 (6% total), and 12% in Region 5 (20% total)

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2015; Ontario Ministry of Tourism, Culture and Sport (and may include some visitation to Saint Marie Among the Hurons in Midland)

Indigenous Visits by Length of Stay



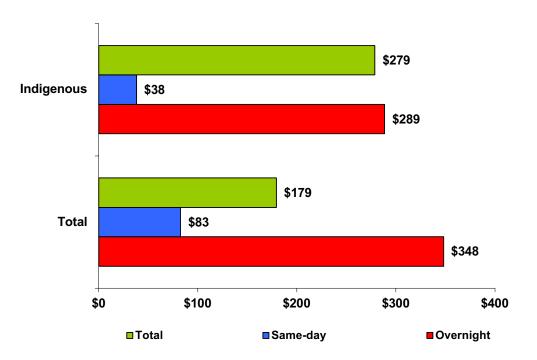
Indigenous vs. Total	Length of Stay Index
Same-day	6
Overnight	264
Avg # nights	91

The majority (95%) of Indigenous visits were overnight visits. For comparison, 36% of total visits in Ontario were overnight visits

The average number of nights spent on Indigenous visits was 2.9, below Ontario's average of 3.2 nights

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2015; Ontario Ministry of Tourism, Culture and Sport

Indigenous \$/Trip by Length of Stay



Indigenous vs. Total	\$/Trip Index
Total	156
Same-day	46
Overnight	83

Indigenous visitors spent an average of \$279/trip (\$179/trip for total trips)

Total trip spending, not just spending on Indigenous

Source: Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey 2015; Ontario Ministry of Tourism, Culture and Sport

Sustainable Resources

As sustainable tourism continues to cultivate destination longevity and an enhanced visitor experience, many resources are becoming available in the form of guides, toolkits, criteria, certifications etc. Some of the resources are available to the public while some are memberships and associations to consider. Below is a sample list of valuable resources:

Sustainable Tourism Guides:

- Making Tourism More Sustainable A Guide for Policy Makers, UNEP and UNWTO, 2005: https://www.e-unwto.org/doi/book/10.18111/9789284408214
- UNWTO (2018) Tourism and Sustainable Development Goals Journey to 2030, Highlights: http://publications.unwto.org/publication/tourism-and-sustainable-development-goals-journey-2030-highlights
- Europarc Federation, Sustainable Tourism in Enterprises, Parks and Protected Areas: https://www.europarc.org/wp-content/uploads/2015/05/STEPPA-1-whole-report-The-business-case-for-sustainability.pdf
- World Travel and Tourism Council Managing Overcrowding in Tourism Destinations: https://www.wttc.org/- /media/files/reports/policy-research/coping-with-success---managing-overcrowding-in-tourism-destinations-2017.pdf

Sustainable Tourism Related Organizations:

- Center for Responsible Travel http://www.responsibletravel.org/
- Global Sustainable Tourism Council https://www.gstcouncil.org/
- Sustaining Tourism http://sustainabletourism.net/
- Responsible Tourism Institute http://www.institutoturismoresponsable.com/en
- Green Tourism Canada http://www.greentourismcanada.ca/

Consultant Profile

Founded in 2014, Twenty31 is a new breed of consultancy that harnesses the power of brands, strategy, communications, research and technology to create a unique competitive position and a blueprint for the future for global leaders of organizations that span the tourism eco-system. We are at the nexus of research, analysis and application—moving beyond the data delivered by traditional agencies to unlock meaning, innovative ideas and recommendations to drive corporate, marketing and brand strategy. Founded in 2014, Twenty31 has actively engaged with communities and destinations globally.

Twenty31 understands change. They are a consulting organization forged in the new economy that hamesses the power of brands, strategy, communications, research and technology and most importantly, collaboration, to create a unique and innovative competitive position and a blueprint for the future for leaders in the tourism industry. The consulting team leverages intimate knowledge of destination, organizational excellence and additional engagement expertise.

Our recent tourism clients where we have conducted strategic planning, destination development, research and stakeholder engagement include: Atlantic Canada Tourism Partners, New Brunswick Department of Tourism, Heritage and Culture, Haldimand County, Tourism Calgary, Kingston Tourism, Tourism Victoria, Tourism Australia, Tourism Toronto, Explorers' Edge, Tourism Yukon, City of Lethbridge, Dubai Tourism and Commerce Marketing, Destination Canada/Canadian Tourism Commission, Tourism Nova Scotia, Jamaica Tourism, Guam Tourism, Travel Industry Association of British Columbia, Travel Alberta, Tourism Switzerland, Palau Visitors Authority, Nunavut Tourism, Aboriginal Tourism Association of British Columbia, Alberta Ministry of Culture and Tourism, and many others.

We are frequent keynote speakers on industry trends, expert commentators to media, strategic advisors to leadership teams and have collaborative associations with the best and brightest experts including, Left Coast Insights, Bannikin, Edelman, Nielsen, Deloitte, McElhanney, and the Beattie Tartan Group to help your organisation thrive in the future.

We are a team of two senior partners, three analysts and four expert associates based in Toronto and Vancouver.