
TO: GENERAL COMMITTEE

SUBJECT: TOURISM MASTER PLAN - IMPLEMENTATION PROGRAM

WARD: ALL

PREPARED BY AND KEY CONTACT: R. MACDONALD, TOURISM DEVELOPMENT COORDINATOR, EXT. 5184

SUBMITTED BY: S. SCHLICHTER, DIRECTOR OF ECONOMIC AND CREATIVE DEVELOPMENT

GENERAL MANAGER APPROVAL: A. MILLER, RPP, GENERAL MANAGER OF INFRASTRUCTURE AND GROWTH MANAGEMENT

CHIEF ADMINISTRATIVE OFFICER APPROVAL: M. PROWSE, CHIEF ADMINISTRATIVE OFFICER

RECOMMENDED MOTION

1. That the Implementation Program for the Tourism Master Plan attached in Appendix "A" to Staff Report ECD009-21, be received.
2. That staff in the Economic and Creative Development Department report back to General Committee on the progress of the implementation as part of the Department's Performance and Budget Reporting.

PURPOSE & BACKGROUND

Report Overview

3. The purpose of the report is to provide Council with an overview of the proposed implementation program for the Tourism Master Plan, which was approved by Council, in principle, in November, 2020.

Background

4. The tourism sector is an economic driver within the City of Barrie. Growing the Economy is one of Council's strategic priorities for 2018-2022 and identifies the 'support of tourism industry growth' within that priority.
5. The tourism industry, recognized broadly as the visitor economy, embraces a vast number of related industries and suppliers, and contributes to most cities' economies. The visitor economy includes all overnight and day visitors to a destination from leisure, business and sports segments, as well as the activities and expenditures involved in supplying products and services for these visitors by both the private and public sectors (such as transportation, food service, attractions, events and retail).
6. In July of 2019, Invest Barrie issued Request for Proposal FIN2019-065P to develop a comprehensive five-year Tourism Master Plan that leverages and supports the growth of existing tourism in the Barrie area, integrates sports, nature and business tourism, and provides direction on growing the sector overall. In August of 2019, the project was awarded to a consulting consortium of FLOOR13, KWL Advisory and GM Event Inc.

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7. The consultant completed the Tourism Master Plan between August 2019 and April 2020. Their research included a series of meetings and visits with over 80 key stakeholders, a review of background documents, existing plans and strategic positions, and desk research and information from the hotel and attractions industries.
 8. In November 2020, Invest Barrie presented the Tourism Master Plan to Council, and it was approved in principle by motion 20-G-197 as follows:
 - "1) That the City of Barrie Tourism Master Plan attached as Appendix "B" to Staff Report ECD019-20, be received and approved in principle.
 - 2) That staff in the Economic and Creative Development Department report back to General Committee in Spring, 2021 with prioritized recommendations on implementation and execution of the Tourism Master Plan."
 9. The Tourism Master Plan identified specific strategies on how tourism could support the City's economic development objectives, including talent attraction/retention, investment attraction, diversification of economic sectors, and the growth of creative industries and knowledge-based sectors.

Summary of Findings

10. Barrie and the surrounding region possess a variety of well managed tourism attractions and assets, and a steady flow of visitor traffic throughout the area. However, the Tourism Master Plan illustrated that much of the traffic flows through Barrie on its way to regional destinations, rather than stopping and overnighting in Barrie.
11. The Tourism Master Plan identified growth opportunities for Barrie and the area that range from product and infrastructure investment, brand awareness, visitor experience design, and use of social media and digital marketing.
12. A key focus on sport and conference assets is included and represents two of the City's future growth opportunities.
13. The Tourism Master Plan recommended the development of a compelling destination brand promise and unique selling proposition (USP) by working with stakeholders, Tourism Barrie and recommends a use of a professional agency, to develop a unique selling proposition (USP) which will resonate with target markets.
14. Further, the Plan recommended that the City adopt tourism as a primary economic growth sector and recommended the establishment of a full-time tourism development position within the Economic and Creative Development Department to integrate the strategic tourism lens across internal functions including arts & culture development, special events, recreation, etc.
15. The Plan also identified the benefits of a dynamic and well-governed destination marketing organization (DMO), and a responsibly administered Municipal Accommodations Tax (MAT) used to market and promote the destination through the DMO, as well as provide seed funding for tourism development opportunities through a Tourism Development Fund (TDF).
16. Revitalizing Barrie's downtown remains a key component of the tourism sector. Tourism will grow organically through continued focus on downtown development, resulting in more residents living and investing in the downtown. The City Centre revitalization process considers upgraded tourism wayfinding and parking enhancements to facilitate access to downtown activities, food & beverage offerings, and cultural assets, beyond the waterfront.

17. The strength and ability to properly market the Barrie region will depend on a strengthened relationship between the City and Tourism Barrie and the development of strategic alliances. Working with stakeholders and monitoring likes and wants of the desired clientele will ensure new product innovation is well thought out to maximize visitation. Partnering with regional tourism marketing organizations serves to broaden the appeal and reach of marketing campaigns. (Potential partners include: Destination Canada, Destination Ontario, RTO7, Simcoe County Tourism, Chamber of Commerce, BIA.)

Key Recommendations

18. The Tourism Master Plan identified 10 Priority Recommendations to guide the implementation process:
1. The City officially adopt tourism as a primary economic growth sector
 2. Establish a tourism position within the City to work jointly with Tourism Barrie (operations versus marketing)
 3. Ensure that 100 per cent of MAT revenue goes towards tourism, with 50 per cent to Tourism Barrie and 50 per cent to the creation of a Barrie Tourism Development Fund
 4. A specific sport tourism strategy to attract more beneficial events through the completion of the Sport Tourism Assessment Template (STAT)
 5. Invest in and/or facilitate further development of year-round outdoor assets (hard and soft products)
 6. Support and invest in visitor-focused cultural and live events (theatre, music, festivals, etc.)
 7. Incorporate a tourism point of view when considering new development, wayfinding, parking, and downtown revitalization
 8. Build a coalition of willing partnerships. (i.e., between City, tourism, BIA and regional partners)
 9. Develop the brand promise & Unique Selling Proposition (USP) for Barrie
 10. Engage the citizens of Barrie to tell the tourism story, incorporating a holistic approach to tourism

Actions for Implementation

19. For each recommendation, actions and a recommended timeline for the implementation of those actions were created. A total of 55 Actions were offered, each one with a suggested timeline ranging from Phase 1 to 4 as well as "Ongoing". Phase 1 actions were identified as those that are to be initiated within the first six months of the plan being implemented, with each phase thereafter to have a six- to twelve-month duration. Additionally, each recommended action was assigned a priority value of High, Medium or Low.
20. Appendix "A" contains a prioritized list of the proposed Actions and more specific timelines to guide implementation over the next three years.

Implementation of Recommendations and Actions to-date

21. For the City to effectively fulfill its role in the tourism sector, the following Actions have been completed that were identified as Phase 1, High Priority in the Tourism Master Plan:
- Creation and endorsement of a Tourism Master Plan that provides clear direction as to priorities of the City related to tourism.
 - Adoption by City Council of tourism as a priority sector.

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- Establishment of a new or redeployed Tourism FTE - Greater dedication of staff resources, over time, to drive deliverables under the Master Plan, support integration with other City plans and programs, and strengthen engagement and integration of the relationship with Tourism Barrie. (A part-time Tourism Development Coordinator has been hired on contract to develop an Implementation Plan.)
 - Strengthening the relationship between the City (Economic and Creative Development and Access Barrie) and Tourism Barrie on brand development, asset sharing and message alignment. An Ongoing action, this process has begun, and quarterly meetings will be scheduled.
 - Wayfinding – Council supported \$75,000 allocation of MAT funding for Phase 1 in 2021
22. Additionally, for the DMO, Tourism Barrie, to effectively fulfill its role, the following Actions were identified and have been completed:
- Development of a three-year strategic plan.
 - Alignment of Tourism Barrie strategic plan with Barrie Tourism Master Plan.
 - Informal liaising with City Tourism Development Coordinator on an ongoing basis and in a formal manner quarterly. (Ongoing)

ANALYSIS

23. The proposed Implementation Plan follows a logical sequence that builds upon the recommendations in the Tourism Master Plan. By following this order, longer-term success can be expected in numerous ways, including the following:
- i) Increased revenues from the Municipal Accommodation Tax (MAT) will result from the successful deployment of destination marketing strategies. Increased MAT revenues can, in turn, be deployed to increase brand awareness of the destination and support the administrative costs of Tourism Barrie as well as enable the City to pursue investment opportunities in tourism-related infrastructure, assets and events.
 - ii) A successfully executed, regionally-tailored sport tourism strategy that results in hosting various tournaments and events will contribute many millions of dollars into the local economy over time.
 - iii) Spin-off investments by the private sector resulting from City investments can add to the economic strength of the community, including additional hotels, restaurants, retail and entertainment operations.
 - iv) The City can expect a return on investment in the form of business and property tax revenues.
 - v) The citizens of Barrie will also benefit by way of improved and new infrastructure, new businesses, and new activities and services.
 - vi) Ultimately, a successfully implemented tourism plan will result in more people becoming aware of and attracted to the City, increasing the draw as permanent residents. Done strategically, attracting tourists that are aligned with our local talent needs, turn the visitor of today into the employee or investor of tomorrow.
24. In addition to these longer-term indicators of success, shorter-term metrics such as the following will be employed by Tourism Barrie and Invest Barrie to help monitor and evaluate success of the Implementation Program:
- i) Hotel occupancy rates
 - ii) Increases/decreases in the Average Daily Rate (ADR)
 - iii) Increases/decreases in off-peak season occupancy and ADR

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- iv) Economic impact of the people that stayed using Ministry of Heritage, Sport Tourism & Culture Industries' Tourism Regional Economic Impact Model (TREIM)
 - v) Sport Tourism Canada's Sport Tourism Economic Assessment Model (STEAM)
 - vi) Tourism Sentiment Index (TSI) perception measurement
 - vii) Website and social media analytics
 - viii) Conversion rates using Bandwango
25. Given the impact of COVID-19 on the tourism industry, baseline measurements will largely be based on pre-pandemic figures and used to monitor success as the sector continues to rebuild in the Recovery. As new metrics and tools become available, they will be added to the planning and evaluation process.

COVID-19 Impact

26. The bulk of the Tourism Master Plan, including the research, consultation and analysis portions were completed prior to the COVID-19 pandemic. The impacts of COVID-19 must be taken into consideration when prioritizing and actions and timing implementation; however, the Plan itself remains valid as a long-term guidepost for developing and growing the sector post-pandemic.
27. Several preliminary recommendations from the Tourism Master Plan regarding COVID-19 tourism recovery that would provide the greatest return include:
- GTA Active Outdoor market – Barrie is within a short drive for this market and short distance travel tourism will recover more quickly than other means of travel. This focus must not only be on the waterfront but other amenities including trails, skiing, biking, etc. both within the City and in the surrounding area.
 - Cultural events/experiences, theatre, concerts and festivals - once people feel it is safe to do so, they will be anxious to once again participate in these experiences.
 - Sports Tourism – it is expected that people will travel for sports before they travel for work and even some forms of leisure. As part of building confidence in the tourism sector, sport tournaments, conducted safely, could be an early driver of tourist activity.
28. Issues with waterfront overcrowding, particularly this past summer and the summer of 2020, as COVID-19 drove people to find nearby outdoor activities, have negatively impacted the perception of tourism for some community members. Communications surrounding the positive impacts of tourism will need to be thoughtfully implemented, along with stronger plans for waterfront management to encourage those visiting the waterfront to extend their experience to include dining, culture and shopping, and other amenities beyond the waterfront.
29. The forced shutdown of the tourism sector has provided numerous locations and communities with an opportunity to reflect on the issues of over-tourism, from an environmental and societal perspective. Many tourism experts are advocating for communities to seize the opportunity to “build back better” and adopt a sustainable or regenerative approach to tourism planning.
30. The most recent Destination Ontario COVID19 Impact bulletin (July 27, 2021) indicated that Ontarians are feeling increasingly positive about welcoming visitors from nearby communities and other parts of Ontario, but still less confident about visitors from other parts of Canada and significantly less so for international visitors. Similarly, a high percentage of Ontarians feel safe when thinking about travelling to nearby communities and other areas within Ontario. This information supports strategies to promote Barrie to visitors within a three-hour drive of the city, subject to continued improvements in the fight against COVID.

Market Analysis

31. Barrie's priority tourism target markets remain primarily Ontario-based. In recent years, Quebec has shown some increase in visitation mainly from visiting friends or relatives and would be considered the biggest market for Barrie outside of Ontario. For the near future, following the recovery from the pandemic, the local will continue to be the dominant geographic market.
32. Within the province, the GTA provides the largest influx of visitors into the Barrie area and represents the bulk of sales and marketing efforts and budgets. The GTA will continue to dominate Barrie's visitor attraction efforts aimed at increasing present day volumes. Markets within a three-hour radius of Barrie should also be targeted for overnight visitation.
33. International travel – both inbound and outbound – are expected to take months, if not years, to recover to pre-pandemic levels. This presents an augmented opportunity for Barrie to capitalize on the Ontario market, which will be focusing more on domestic travel for the foreseeable future.
34. Visitors are increasingly looking for authentic experiences that reflect a destination's true history and culture and allow the visitors to immerse themselves in that culture. Destinations must identify their own Unique Selling Proposition and then deliver on that promise.
35. A destination's Unique Selling Proposition must reflect a strong overlap of what visitors want with what the destination does well, while standing out from competitors.
36. Taking into context market conditions and the City's tourism asset base, which are the elements of a destination's tourism infrastructure, activities, programs and local customs that visitors can experience in a city, the Implementation Plan seeks to prioritize actions that best leverage both.

ENVIRONMENTAL AND CLIMATE CHANGE IMPACT MATTERS

37. Issues of 'over tourism' and increasing support for the development of sustainable or regenerative tourism planning models and practices will be incorporated into the ongoing planning and implementation phases and align with the City's strategic priority of "building a greener Barrie while mitigating and adapting to climate change."

ALTERNATIVES

38. The following alternatives are available for consideration by General Committee:

Alternative #1

Council could choose not to receive the report.

This alternative is not recommended given the investment to-date, the increased role of tourism as a strategic priority and that Council has already endorsed the Tourism Master Plan. The information contained within this report represent the implementation of that Plan.

FINANCIAL

39. To date, recommended actions implemented from the Tourism Master Plan have been funded through the City's portion (50%) of the Municipal Accommodation Tax, specifically the Wayfinding Strategy and the Tourism Development Coordinator position. It is anticipated that the Tourism Development Coordinator position will continue to be funded by the MAT and addressed through the City's annual budgeting process.

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40. As per the Municipal Act, 50% of the allocation from the Municipal Accommodation Tax is to be directed to Tourism Barrie. Due to COVID-19, the anticipated MAT funding for 2021 and potentially 2022 will be significantly reduced. However, one of the long-term goals of growing the tourism sector is increased MAT revenues, which will result in greater investments into community infrastructure, which, ultimately, supports and benefits Barrie residents, while providing an indirect financial benefit to businesses.
 41. An additional recommendation of the Tourism Master Plan is the creation of the Tourism Development Fund, which will be addressed and associated recommendations cultivated through the implementation program related to sport tourism.
 42. As staff continue to refine the implementation plan, recommendations for the utilization of MAT funding related to the Tourism Master Plan will be presented for contemplation within the City's annual budgeting process or brought forward as an independent item to General Committee for consideration.

LINKAGE TO 2018-2022 COUNCIL STRATEGIC PLAN

43. The recommendation(s) included in this staff report support the following goals identified in the 2018-2022 Strategic Plan:
 - a) Growing Our Economy – Support Tourism Industry Growth
 - b) Fostering a Safe & Healthy City – Promote recreation opportunities for all ages & abilities; Build a greener Barrie while mitigating & adapting to climate change
 - c) Building Strong Neighbourhoods – Create great public spaces; Build walkable, diverse neighbourhoods that encourage community connections; Grow responsibly
 - d) Offering Innovative & Citizen-Driven Services – Use technology to deliver services more effectively; Achieve customer service excellence; Inspire community participation; Make tax dollars go further
 - e) Improving the Ability to Get Around – Increase transportation options, including active transportation modes; Make connections; Create safer streets
44. By following the recommended implementation plan, not only will tourism growth be supported, but the impact from the increased MAT and economic impact will be widespread. Ultimately, an improved and sustainable tourism sector in Barrie will result in increased recreational and active transportation opportunities for Barrie residents as well as increased and improved public spaces. Additionally, a well-thought-out plan will encourage and accommodate innovative approaches to delivering tourism products and inspire community spirit, pride and celebration of the City.

APPENDIX "A"

IMPLEMENTATION PLAN

Phases 1 & 2 – September 2021 – August 2022

Strategic Direction 1 – Tourism as a Priority Economic Sector

Complete MAT Collection Agreement Renewal with Tourism Barrie

Action Items:

- Execute amended Agreement based on Council direction

Start: August 2021

Completion: October 2021

Strategic Direction 5.2 – Waterfront and Downtown Core Revitalization

Complete Wayfinding Strategy and Initial Sign Design

Action Items:

- Develop and finalize RFQ in collaboration with Purchasing, Access Barrie, BIA and Tourism Barrie
- Work with Consultant to complete Wayfinding Strategy Phase 1
- Phase 2 included in the 2022 Capital Budget for manufacture and installation.

Start: August 2021

Completion: February 2022

Strategic Direction 1 – Tourism as a Priority Economic Sector

Identify and leverage funding and collaboration opportunities related to Recovery

Action Items:

- Collaborate with local, provincial and federal contacts to identify information and programs related to COVID-19 tourism recovery
- Share information with internal and external stakeholders to improve recovery among tourism-related businesses in Barrie

Start: September 2021

Completion: March 2022

Strategic Direction 1 – Tourism as a Priority Economic Sector

Demonstrate impact of tourism as a primary economic sector for the City

Action Items:

- Identify City departments with tourism overlap
- Conduct file review of current departmental by-laws and plans related to tourism
- Identify internal KPIs related to tourism
- Identify key external stakeholders with tourism overlap
- Identify external KPIs related to tourism
- Conduct baseline research related to KPIs
- Initiate quarterly reporting to Council on tourism results and Implementation Plan progress

Start: September 2021

Completion: Ongoing

Strategic Direction 2.2 – Market Sector Development (Sport Tourism)

Develop a Sport Tourism Strategy that reflects City and Regional assets and the STAT Pro Report

Action Items:

- Work with Tourism Barrie to submit proposal to Fed Dev and/or other funders for development of ST strategy
- If successful, develop RFQ and procure a consultant for the creation of the Sport Tourism strategy
- Strategy to include comprehensive sport venue assessment, gap analysis and Tourism Development Fund recommendations.

Start: September 2021

Completion: August 2022

Strategic Direction 8 – Destination Brand Promise & USP

Create and implement a tourism Unique Selling Proposition that reflects City USP and resonates with visitors as well as residents

Action Items:

- Conduct file review of current City communication materials related to tourism
- Complete preliminary USP brainstorming exercise with internal City stakeholders
- Engage local residents in development of USP and tourism-related communications
- Work with all stakeholders (internal and external) to ensure USP is implemented and broadcast through all tourism-related communications

Start: January 2022

Completion: August 2022

Strategic Direction 3.4 – Infrastructure Development (Non-Sports Facilities)

Conduct capital expenditure audit of upgrades and/or new elements needed to capitalize on Outdoor Parks & Trails and Water Assets

Action Items:

- Work with City Departments to conduct inventory and audit of outdoor recreation assets through a tourism lens for the Outdoor Active market
- Work with local and regional stakeholders to conduct inventory of outdoor recreation assets for the Outdoor Active market
- Participate in Waterfront Master Plan Strategy Update.

Start: March 2022

Completion: November 2022

Phases 3 & 4 – September 2022 – August 2024

Strategic Direction 3.4 – Infrastructure Development (Sports Facilities)

Fully leverage Sadlon Arena as a catalyst for sport event attraction

Action Items:

- Work with internal stakeholders (ECD, Recreation and Culture) as well as Tourism Barrie and Sport Tourism Canada to identify list of potential sporting events to host at Sadlon Arena
- Select minimum of one hosting opportunity per year to bid on

Start: September 2022

Completion: Ongoing

Strategic Direction 3.4 – Infrastructure Development (Non-Sports Facilities)

Develop specific year-round outdoor strategy integrated into Tourism Barrie's Sales & Marketing Plan

Action Items:

- Use results from Outdoor Parks & Trails and Water Assets audit
- Work with Tourism Barrie and other external stakeholders to identify opportunities to enhance promotion of Outdoor Parks & Trails and Water Assets in the City and regionally to Active Outdoor market
- Assist Tourism Barrie with incorporating local and regional assets into their Sales & Marketing Plan

Start: September 2022

Completion: Ongoing

Strategic Direction 2.2 – Market Sector Development (Sport Tourism)

Review MAT policy and by-law to consider portion of MAT distribution use for sports tourism attraction

Action Items:

- Upon completion of ST strategy, work with Tourism Barrie to identify sport tourism opportunities
- Review how Tourism Development Fund can be developed to support leveraging the MAT for sports tourism attraction

Start: September 2022

Completion: October 2022

Strategic Direction 10 – Ensure Industry Stakeholders & Residents Aligned with Brand

Incorporate ongoing messaging to residents through dedicated communications strategy:

Action Items:

- Ensure Barrie residents are engaged in USP and Branding process
- Work with internal and external stakeholders to develop communications strategy that includes and updates residents on the development of tourism as an important economic driver for the City
- Conduct annual surveys with residents to gauge public acceptance of tourism growth
- Upon completion of USP and Branding exercise

Start: September 2022

Completion: Ongoing

Strategic Direction 6 – Visitor Experience Design

Work with Tourism Barrie and tourism stakeholders to create Visitor Experience Path

Action Items:

- Work with internal and external tourism stakeholders to confirm current and desired markets for each Visitor Experience priority area (Active Outdoor, Sports Tourism, Entertainment/Arts/Culture)
- Work with Tourism Barrie, BIA and other key marketing stakeholders to ensure Visitor Experience Path is reflected in marketing plans and seek to align visitor profiles with talent attraction efforts for the City.

Start: January 2023

Completion: August 2023

Strategic Direction 2.2 – Market Sector Development (Sport Tourism)

Create Barrie Sports Tourism Committee

Action Items:

- Upon completion of Sports Tourism Strategy and following COVID Recovery, work with internal stakeholders, Tourism Barrie and other external stakeholders to create a Barrie Sports Tourism Committee that will help guide sport event attraction/development

Start: March 2023

Completion: Ongoing

Strategic Direction 4 – Soft Product Development

Develop product development strategy to enhance the shoulder/off-season, integrating two Active Outdoor events

Action Items:

- Work with Tourism Barrie and other stakeholders to create/capitalize on a minimum of two Active Outdoor events, leveraging local and regional trails, cycling routes, winter activities, fall colours, etc.
- Develop and implement collaborative marketing strategy to promote events
- Develop and implement impact assessment to measure success

Start: May 2023

Completion: Ongoing

Strategic Direction 4 – Soft Product Development

#2 – Explore the opportunity to leverage the Tourism Development Fund to seed funding of new shoulder and off-season events and or experiences aimed at attracting visitation

Action Items:

- Work with Tourism Barrie and other stakeholders to identify gaps and opportunities related to improving visitor attraction during shoulder seasons
- Develop communication strategy to promote opportunities for seed funding to local operators and organizers
- If appropriate, develop application process and tools, selection criteria and fund allocation procedures

Start: May 2023

Completion: Ongoing

Strategic Direction 4 – Soft Product Development

#3 - Develop a culinary tourism profile and strategy aimed at attracting visitation

Action Items:

- Work with Tourism Barrie, Barrie BIA, restaurant owners, farm owners and other stakeholders to develop a Culinary Tourism Committee
- Conduct culinary tourism assessment for Barrie and region
- Use results from assessment to create culinary tourism profile
- Develop communication and marketing strategy to promote USP of local area and compete with expanding culinary product market across Ontario

Start: August 2023

Completion: Ongoing

Strategic Direction 3.4 – Infrastructure Development (Non-Sports Facilities)

Work with BIA and private stakeholders to ensure programming of live entertainment within City, both indoors and outdoors year round

Action Items:

- Work with Culture Development Officer, Events Team and BIA to review Music Strategy and Culture Plans to identify opportunities to build out year-round live entertainment programming

Start: January 2023

Completion: Ongoing