Regional Municipality of Halton

Premier Ranked Tourist Destination

Final Report

August 7, 2007

Prepared by

BRAIN TRUST
MARKETING & COMMUNICATIONS

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The Regional Municipality of Halton acknowledges and thanks the many tourism business operators and industry colleagues who contributed to the success of the Premier Ranked Tourist Destination Research Project.

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This project was facilitated in partnership with Service Canada (now Employment Ontario) and the Ontario Ministry of Tourism.

Background

The Premier Ranked Tourist Destinations (PRTD) program was an initiative developed by the Ontario Ministry of Tourism under its Ontario Tourism Strategy in 2004. The goal of the PRTD program is to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage and ultimately improve to become a destination of choice. Being a Premier Ranked Tourist Destination indicates that “here is a place more attractive than the rest, a place the potential tourist visitor should consider first in making travel plans.” To be clear, Premier Ranked is not a formal tourism designation but rather is an internal tourism goal for a destination to work towards as it relates to becoming “better than the rest.”

To assist municipalities with assessing and developing their tourism product, the Ministry of Tourism established a tool called the Premier Ranked Tourist Destinations Framework. This framework assists jurisdictions in assessing their tourist assets, attractions and amenities and allows them to identify opportunities in tourism development. The Ministry of Tourism provides financial assistance to regions to undertake the PRTD process.

Halton Region’s Comprehensive Economic Development Strategy approved by Council on October 4, 2006, addressed the Region’s support for and involvement in the tourism sector through Action 46, *“Complete the Premier Ranked Tourist Destinations Project and database in conjunction with Halton’s tourism stakeholders and report to Council on the findings of the project in 2007.”*

Several regions in Ontario have completed PRTD projects including the Regional Municipalities of Niagara, York, Durham and Prince Edward County. The cities of Mississauga and Hamilton have also completed their PRTD assessments; all these destinations have used the results of their studies in the development of comprehensive tourism plans. Muskoka District, the 1000 Islands and The City of Toronto are currently underway with their own PRTD assessments.

The Halton PRTD project is an inter-jurisdictional initiative involving Halton Region’s Business Development Division, the Ministry of Tourism, Service Canada (now Employment Ontario), local level partners (Tourism Burlington, Halton Hills Chamber of Commerce, Milton Chamber of Commerce and Oakville Economic Development) and tourism industry stakeholders. The funding for the PRTD project came from four sources – Halton Region’s Business Development Division, Employment Ontario and the Ministry of Tourism, with the local tourism partners providing important in-kind contributions.

It should be understood that the PRTD project is a shared initiative of both the tourism industry and Halton Region. The successful implementation of the recommendations is based on a thorough understanding, appreciation, engagement and endorsement from both the private and public sector partners. It is a shared process undertaken by industry and government, and both must accept the accountability for delivery if it is to be viewed as productive over the long term. At the outset the PRTD Steering Committee understood and accepted this mandate.

A Halton PRTD Steering Committee, made up of representatives from Halton Region, local tourism partners and industry stakeholders, was established to direct and guide the development of the overall project. Through funding from Employment Ontario, contract staff was hired to assist in the development and completion of the PRTD resource audit of the Halton tourism industry.

The resource audit was carried out in the form of a detailed survey of Halton tourism establishments which asked respondents to describe their operations, services offered, customer base and tourism awareness, among others. The survey was mailed to Halton tourism establishments from the accommodations, food and beverage, attractions and retail sectors. Survey results were compiled in a comprehensive database maintained by Halton Region staff and shared with local tourism partners.

To assist the PRTD Steering Committee with the analysis of the audit results and the preparation of the final report, a tourism industry consulting firm was retained in January 2007 through a Request for Proposals process. The consultant worked with the PRTD Steering Committee to review the results, assess current regional industry strengths, weaknesses, attributes, product/service gaps, factors and conditions that impact existing and future development plans and identify potential opportunities and partnerships within the tourism industry.

Initial findings from the audit, together with identification of Halton's key tourism attractors were presented to the local tourism industry at stakeholder sessions held in 2007 in north and south Halton. A specific session was held with the Oakville Tourism Partnership on March 6, 2007. Initial findings were also presented at Tourism Burlington's Annual General Meeting on May 24, 2007. Based on the feedback and comments received from the tourism industry, recommendations for inclusion in the final report were written and presented at a final industry stakeholder session held on May 29, 2007.

It can be safely said that as a result of this consultative process the tourism industry in Halton has endorsed the recommendations contained in this report. It is the culmination of many hours of diligent work, dialogue and discussion. This report contains key recommendations that, if implemented, will have a positive impact on all of those who live, work and visit Halton.

Introduction

What is the Premier Ranked Tourist Destinations Framework Process?

The Premier Ranked Tourist Destinations (PRTD) Framework was developed by the Ontario Ministry of Tourism to provide a framework for tourism destinations across Ontario to define their competitive position within the tourism marketplace on domestic and international levels.

> **"Premier ranked is defined as:**
> ***"A place more attractive than the rest, a place the tourist should consider first when making travel plans."***

The Ministry of Tourism developed a resource audit and workbook format that outlines the attributes/factors/conditions that are considered prerequisites for a tourist destination to be considered serious in building the economic well-being of its destination in order to grow tourism revenues for the destination and its tourism shareholders. The workbook format provides a simple methodology that communities can follow to ensure consistency, accuracy, and maximum involvement of the key tourism and economic development stakeholders in the process. The workbook emphasis is on enabling any tourist destination of any scale to operate at the highest possible level it can achieve – not necessarily in competition with other operators, but in a complementary context within that particular destination. It should be noted that being or moving to being Premier Ranked is not an official designation or grading. It is simply a process designed to help destinations improve in their viability and competitiveness as a place visitors want to visit.

Three specific dimensions of tourism assessment are included in the study:

1) The Product Dimension
A Tourist Destination provides a high-quality tourist experience, enabled through the destination's offerings of:

- Distinctive Core Attractors
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- An Accommodations Base

2) The Performance Dimension
The quality of the tourist experience and the destination's success in providing it as validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim

3) The Futurity Dimension
The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

The PRTD process overall involves several critical steps along with a serious commitment and investment of time by industry partners. This investment of time and energy is rewarded with specific insights and direction. At its conclusion, the Premier Ranked Tourist Destination research project provides:

- A database of critical baseline tourism business data
- An understanding of Halton's destination status in the global tourism marketplace and the opportunities and challenges constraining that status
- A solid base for preparing a long-term regional tourism strategy
- Product development and partnership opportunities
- Recommendations that support the growth and sustainability of the tourism sector
- A foundation to attract tourism investment and create employment opportunities.

The additional benefit of this methodology is the expanded and more capable network of industry stakeholders involved. By working through this process stakeholders will have a more cohesive focus on solving current and future challenges.

Why Halton?

Halton is a vibrant, attractive and diversified destination. It has a population of 439,000 people and offers both residents and visitors countless opportunities for entertainment, recreation, education, relaxation and fun. Halton covers over 967 square kilometres, including 25 kilometres of frontage on Lake Ontario. Halton is comprised of four Local Municipalities: the City of Burlington, the Town of Halton Hills, the Town of Milton and the Town of Oakville. The City of Burlington and the Town of Oakville make up the urban area to the south, and the Town of Halton Hills and the Town of Milton make up the less urbanized area to the north.

It is apparent that the tourism industry and tourism stakeholders have a desire to constantly improve and enhance the well-being and quality of life of its resident population and at the same time support the strong business community that is found here. The PRTD process, a shared initiative of the tourism industry and government, is a significant step in ensuring this happens. The PRTD project and the ensuing findings and recommendations will:

- Rally the tourism industry in Halton
- Help determine Halton's current state and on-going potential as a visitor destination
- Capitalize on investments made by the tourism industry in new product development
- Determine areas for future tourism product development
- Establish a clear way to proceed to grow tourism visitation to the region
- Increase overall revenues of tourism operators within the region

Starting from a Position of Strength

The Premier Ranked Tourist Destination report is designed to identify the areas where improvements are required. That being said, this work has been done against the backdrop of a region that is starting from a position of strength, these include:

- Halton's proximity to a major population base. More than 6.0 million people live within a three-hour drive with easy access to the region, representing a significant market.
- Halton has the infrastructure to cater to visitors as a result of its own growing population base, including a number of attractions, an extensive park system and conservation lands, services such as retail, food and beverage establishments, good public transportation and good signage and roads, among other things.
- Halton has an attractive collection of four-season tourism products, these include
    - Royal Botanical Gardens
    - Glen Eden Ski and Snowboard Centre/ Kelso Conservation Area
    - Canadian Golf Hall Of Fame
    - Mohawk Raceway and Ontario Lottery and Gaming (OLG) Slots
    - Vibrant streetscapes, dining and shopping, festivals and events in a number of attractive towns and villages
    - A wide variety of outdoor recreation opportunities based on its proximity to Lake Ontario and the Niagara Escarpment and supported by Conservation Halton
- Halton has a number of Destination Marketing Organizations committed to grow tourism within their own communities and within the region in general

These factors compare well to other destinations within Ontario and to a certain extent set Halton apart. The combination of geographic location, more than acceptable levels of developed tourism infrastructure and the long list of interesting and attractive tourism products supports this premise.

Project Process

- In February, 2006, a PRTD steering committee was established made up of representatives from Halton Region, local level partners (Tourism Burlington, Halton Hills Chamber of Commerce, Milton Chamber of Commerce, Oakville Economic Development) and private sector stakeholders to direct and guide the development of the overall project.

- In the summer of 2006, funding for the PRTD project was provided by the Ministry of Tourism, Service Canada (now Employment Ontario), Halton Region and in-kind commitments and contributions from the local level.

- In July 2006, a kick-off launch was held at the Crosswinds Golf and Country Club in Burlington to raise awareness of the project and build momentum within Halton's tourism industry.

- In the fall of 2006 five (5) contract employees were hired to work on the project, to be based at Halton Region's Business Development Centre. Their principal role was to assist in the development and implementation of a PRTD survey to Halton tourism establishments.

- In October, 2006, 784 PRTD surveys were mailed to tourism businesses in the region. The survey was also posted on the Business Development section of the Halton Region website, www.halton.ca.

- In November 2006, a Terms of Reference for consulting services was issued by Halton Region, and Brain Trust Marketing and Communications of Mississauga was retained to facilitate industry consultations, provide overall direction in the final phase of the process and prepare the final report, including analysis of findings and the development of recommendations for action. The company had previous experience assisting Niagara Region, Prince Edward County and York Region with their PRTD projects.

- Industry Stakeholder sessions were held on March 20, 2007, in north Halton and April 3, 2007, in south Halton. Initial results from the audit, together with identification of the region's key tourism attractors, were presented to the local tourism industry. Feedback was received.

- On April 17, 2007, draft recommendations were written and presented to the PRTD Steering Committee, these recommendations took into consideration the feedback received from tourism businesses at the March 20 and April 3 meetings. These recommendations were approved.

- An Industry Stakeholder session was held on May 29, 2007, at the Halton Region Museum and the draft recommendations were presented. Good discussion took place and the group endorsed the recommendations.

- A presentation on the PRTD project, its findings and recommendations was scheduled for Halton Region's Administration & Finance Committee on September 12, 2007, together with a staff report.

Completion of the Premier Ranked Tourist Destination project is based on the Audit Team facilitating the following four-step process:

Step One: Database Design and Collection

- A database of potential tourism businesses was created and 784 surveys were delivered to companies representing the accommodation, food and beverage, attraction, heritage and cultural, campgrounds and parks, marinas, golf, transportation, retail, events, festivals and outdoor adventure sectors. The names of the various tourism establishments were supplied through the four local tourism partners and related organizations. (Halton Agricultural Advisory Committee members provided additional names for agri-tourism establishments.)

- Overall response rate was approximately 35% - which is similar to the results in other regions in southern Ontario
- The survey data was accumulated, entered, clarified, analyzed and evaluated using the PRTD workbook and the Tourism Resource Opportunity Matrix.

Return Rates by Sector

Sector	Data	Total	Return Rate
Accommodation	Mailed Surveys	69	46.38%
	Returned Surveys	32	
Attractions	Mailed Surveys	252	48.41%
	Returned Surveys	122	
Food & Beverage	Mailed Surveys	228	21.49%
	Returned Surveys	49	
Retail	Mailed Surveys	235	31.91%
	Returned Surveys	75	
	Total Mailed	**784**	**35.46%**
	Total Returned	**278**	

Return Rates by Local Municipality

Municipality	Data	Total	Return Rate
Burlington	Mailed Surveys	288	37.85%
	Returned Surveys	109	
Halton Hills	Mailed Surveys	102	39.22%
	Returned Surveys	40	
Milton	Mailed Surveys	131	38.93%
	Returned Surveys	51	
Oakville	Mailed Surveys	263	29.66%
	Returned Surveys	78	
	Total Mailed	**784**	**35.46%**
	Total Returned	**278**	

Step Two: Evaluation of the Product, Performance and Futurity Dimensions

- 118 measures included in the PRTD workbook were completed using survey data.
- Third-party research was also utilized to supplement survey data.
- The Transportation Resources Checklist was completed. Information necessary to complete the checklist was drawn from knowledge or perceptions held in common by area stakeholders in tourism, committee and industry sessions, and through direct contact with attractions, taxi and transit service providers.
- The Travel Trade Resource Checklist was completed from consultation with area attractions and tour operators. Trade association directories were used to identify

the relevant operators required to complete the checklist. Additional information was collected by contacting operators to discuss matters raised by the checklist.

Step Three: Completing the Destination Performance Summary

- The consultant along with the Audit Team presented initial summary of findings to the Premier Ranked Steering Committee for reactions and comments.
- Additional work was undertaken to fill in information gaps and supplement initial findings, some gaps were not filled due to lack of information, for example customer experience/satisfaction data.
- Preliminary recommendations were prepared.

Step Four: Present Summary Findings, Recommendations, Final Report

- Tourism businesses were invited to several presentations to validate findings and recommendations. Their comments and feedback were reflected in the ongoing development of the final report.
- Several presentations were made to the Premier Ranked Steering Committee for additional discussion and comments and to formalize and approve the findings and recommendations that would be incorporated into the final report.

EVALUATION PROCESS

Evaluation is the key step to understanding the reality of Halton's tourism offerings in very specific terms through a comprehensive Resource Audit. The audit measures objectively Halton's Product, its Performance as a tourism destination and its Futurity in terms of how it plans to improve, enhance, and market its attractiveness as a tourism destination into the future.

Throughout this report symbols are used to indicate the performance rating of each section as determined by the survey data provided by the participants in the process

The symbols are as follows:

● *Yes, the affirmation can be made and supported for the destination*

◗ Almost - the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation

○ *No, the affirmation cannot be made or supported for the destination*

PRODUCT

Evaluation Rating for Halton ○

*The **Product** components, criteria, and measures address the features that enable a destination to offer a high quality tourist experience enabled through the destination's offerings of:*

- *Distinctive Core Attractors*
- *Quality and Critical Mass*
- *Satisfaction and Value*

The following product characteristics reveal Halton's product attributes:

Distinctive Core Attractors

This section assesses what it is about a destination that makes it stand out and be distinctive, how the attractors are distinguished and how they are relevant to market wants. The evaluation process has identified Halton's attractors, their distinctiveness, and the nature and size of the visitor markets to which they are to be considered to be attractive.

***Distinctive Core attractors** should meet at least two of the following criteria:*

- *Attract a significant number of visitors annually*
- *Have a physical or historical link to the destination*
- *Be a destination landmark*

Halton Region's Distinctive Core Attractors:

- **Towns, Lake Ontario Waterfront, Countryside, Rural Landscapes**
- **Outdoor Recreation and the Niagara Escarpment**
- **Royal Botanical Gardens**
- **Gaming – Mohawk**
- **Authentic Farm Experiences**
- **Equestrian Experiences**

Towns, Lake Ontario Waterfront, Countryside, Rural Landscapes

The Local Municipalities of Halton are the core of this experience (Burlington, Oakville, Halton Hills and Milton). Each features charming streetscapes, a variety of shopping, dining and entertainment options as well as a long list of annual festivals and events. These centres are supplemented by smaller villages that offer character and diversity. This year-round guest experience truly articulates the charm and personality of Halton.

This cluster of experiences can best be appreciated as a tour or drive through the rural landscapes, rolling countryside and picturesque Lake Ontario waterfront communities. Guests will find numerous locations to stop along the way and find a variety of accommodation options from hotels and motels to B&B's.

Of particular interest are those communities and sites located on Lake Ontario. This drive is of particular interest because it follows the shoreline and connects Oakville to the east with Burlington to the west. Numerous waterfront parks can be found, many offering beautiful settings with Lake Ontario as the backdrop.

Outdoor Recreation and the Niagara Escarpment
There are a cluster of experiences that take advantage of the region's physical attributes, especially the Niagara Escarpment, a world biosphere reserve, and involve a vast number of soft and green outdoor activities. These include cycling, hiking, canoeing, kayaking, mountain biking, birding, swimming, fishing, boating, cross country/downhill skiing, snow shoeing, rock climbing, and golf.

Conservation Halton owns and manages 4,450 ha or 11,000 acres of conservation lands including six major parks primarily on the Niagara Escarpment. The parks include spectacular natural features such as cliffs, waterfalls, lakes, forests, creeks and more than 100 km of trails for hiking, biking, nature appreciation and snowshoeing. More than 600,000 people visit the conservation areas annually and enjoy the attractiveness of:

- Kelso Conservation Area and Glen Eden Ski and Snowboard Centre
- Crawford Lake Iroquoian Village and Conservation Centre
- Mountsberg Discovery Centre
- Hilton Falls Conservation Area
- Rattlesnake Point Conservation Area
- Mount Nemo Conservation Area

Royal Botanical Gardens (RBG)
The Royal Botanical Gardens (RBG) is Canada's largest botanical garden and one of the country's premier cultural, education and scientific institutions. The RBG is part of the Ontario museum system; it is a sister of the Royal Ontario Museum (ROM), Art Gallery of Ontario (AGO) and Science North. The RBG consists of 1,100 hectares or 2,700 acres of cultivated gardens, indoor plant-scapes and natural lands that provide a 12-month wave of colour. The glory of the Arboretum is the Katie Osborne Lilac Garden, the world's largest living collection of lilacs. In 2005, the RBG attracted 480,000 visitors comprised of paid visitors, school groups, conference attendees and trail users. Now underway in 2007 is a $12 million rejuvenation to improve physical infrastructure, which includes improvements to parking facilities, the gateway visitor arrival feature and physical improvements in the links between the various gardens.
(In 2005, 40% of the RBG's $8.4 million budget came from government sources: 27% Province, 7% Halton Region, 6% City of Hamilton. The remaining 60% is self-funded through gate receipts, programs and donations. In 2006, Halton Region contributed $677,000 as transitional funding; this is in addition to funding that the RBG receives annually from Halton Region.)

Gaming – Mohawk
The excitement of gaming is experienced at Mohawk Racetrack in several ways, including harness racing at the 5,000 seat stadium track, a Racebook for many other North American race tracks and the 750 slot machines in a 20,000 sq. ft. entertainment complex. Mohawk boasts over 500,000 in annual visitation and their future development

plans include the construction of a deluxe hotel complex and championship 18-hole golf course.

Authentic Farm Experiences

Visitors can enjoy gardening seminars, landscape design services, perennial swaps, picnic/play areas, special events, pumpkin hunts and paddle-boats at the many Halton greenhouses, nurseries, pick-your-own farms, farmer's markets or farm entertainment attractions, which include Sheridan Nursery, Terra Greenhouses, Tuitman's and Van Dongen's. Other specialty farm experiences can be enjoyed at farm attractions like, Andrews Scenic Acres, Chudleigh's Farm, Clembrook Christmas Farm, Fish 4 Trout, Springridge Farm, and White Rock Ostrich Farm. Activities include school and public farm tours, birthday parties, corporate parties, seasonal events (Easter and Christmas), pony and wagon rides, hayrides, pumpkin patch, picnic/play areas, animal corral, fall haunted forest, straw mountain, straw maze, face painting, licensed eating and entertainment areas and fishing.

Equestrian Experiences

More than twenty-two year-round facilities provide public access to a wide variety of equestrian experiences that include riding lessons, summer/day/vacation camps, boarding stables, competitions, shows, training facilities, breeding, lectures and riding trails, and most operate throughout the calendar year. There are almost 14,000 horses at more than 1,040 horse farms in Halton and the annual economic impact of Halton's horse farms is $24.8 million.

(Source: Economic Impact of the Horse Industry, Dr. Bob Wright - Lead Veterinarian, Equine and Alternate Species/OMAFRA, 2001)

More about the Distinctive Core Attractors

Halton's distinctive core attractors are part of a regional complex linked to the physical setting of the area, specifically Lake Ontario and the Niagara Escarpment. These attractors do offer some attractiveness and appeal; however, on their own they are not necessarily memorable but may have potential to motivate visitors to travel to the region. While distinctive core attractors offer *collective appeal* they do not present an exclusive or unique product offering and therefore would not be considered superior to other destinations. Many neighbouring destinations such as the Regions of Peel, Durham, York and Niagara offer similar product experiences and opportunities. These destinations are all located within easy reach of Halton's target audience and therefore competition for the visitor dollar is significant.

Halton benefits significantly from its geographic proximity to Toronto, Canada's largest city. Halton capitalizes on that city's appeal and as a result attracts many visitors. Toronto's visitors use the services available in Halton, such as hotels, restaurants and shopping facilities especially when involving a "visiting friends and relatives" (VFR) experience. In addition, Halton's small town/big city characteristics and its offerings of great outdoor recreation provide residents of Toronto and visitors to Toronto an escape from the congestion associated with large cities.

The distinctive core attractors have a close link to the region's physical setting, as mentioned above. Being located in the Provincially designated *Greenbelt* area also supports the region's attractiveness when it pertains to Natural Outdoor Attractions & Recreational Opportunities. Halton's distinctive core attractors have both mass and niche appeal and potential to attract visitors who live in Ontario as well as visitors from beyond Ontario's borders.

The Ministry of Tourism annually tracks visitor activity and identifies what visitors do while travelling within Ontario. Some of Halton's distinctive core attractors line up with the experiences visitors enjoy when they come to Ontario, as noted in the chart below.

Trip Type / Potential Market For Halton
Participate in Outdoor Activities, Outdoor Enthusiasts
Participate in Playing Golf, Golfers
Visit a National or Provincial Park, Outdoor Enthusiasts
Attend Festivals/Events
Attend Cultural Performances, Cultural Tourists

Source: CTS / ITS, Statistics Canada

Quality and Critical Mass

This section addresses the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging in core and related activities as well as entertainment, dining, and shopping. The evaluation process has assessed the size of Halton's activity and amenities base and the quality of its entertainment, dining and shopping offerings.

Halton offers visitors many interesting and compelling experiences, however these are not sufficient to sustain interest for more than 24 hours. Visitor experiences are typically consumed over a period of one to five hours with the average experience consuming no more than three hours. If the collective of Halton's distinctive core attractors were combined or packaged there *could* exist a reason for guests to stay more than 24 hours or overnight.

Many of the region's experiences are available on a year-round basis and therefore provide opportunities to extend traditional peak travel times into the shoulder seasons (November – April). Halton enjoys higher than normal travel in both spring and fall. Based on anecdotal feedback, it is believed this is being driven by the fact that the area offers visitors a farm experience during these times of the year. People are active visiting nurseries and greenhouses in the spring and pick-your-own farms in the fall.

Activity	**Duration (hrs/days)**
RBG	3-5 hrs
Kelso Conservation Area	3-5 hrs
Glen Abbey/Canadian Golf Hall of Fame	3-5 hrs
IKEA	1-3 hrs
Boutique/Antiquing	Varies

Discovery Landing/Burlington Waterfront	1-2 hrs
Oakville Waterfront Festival	1 Day

Source: PRTD Survey

Activity	Season
RBG	Year-Round
Outdoor Recreation (i.e. Bronte Creek Provincial Park, Kelso)	Year-Round
Rural Landscapes, Towns	Year-Round
Gaming at Mohawk	Year-Round
Farm Experiences	Spring/Summer/Fall
Equestrian Experiences	Year-Round

Source: PRTD Survey

While Halton's product offering is available to visitors at a variety of price points, the range being from free to $125, these products are not easily accessed or purchased from *outside* the region. Accommodations can be pre-arranged; however most tickets or admissions to attractions, tours, cultural and recreation events or activities need to be booked on-site.

Activity	Approximate Price Range
Hiking the Waterfront Trail	FREE
Conservation Parks	$3-$7.50
RBG	$3-$8
Sound of Music Festival	FREE
Crosswinds Golf Course	$45-$75
Glen Abbey Golf Course	$125+
Oakville Centre for Performing Arts	$30-$80

Source: PRTD Survey

Halton offers visitors a range of activities encompassing a variety of price points and layers of added value. These activities include product experiences that provide opportunities for relaxation, entertainment, interpretation, education, cultural/historic understanding, skills development and adventure. The range of these activities is not as widely promoted as they could be and therefore may not be top of mind for potential or existing visitors.

Category	Activity	Price Range – Approx.
Relaxation	Spas	$8-$125+
	RBG	
	Shopping	
	Birding	FREE

Entertainment	Oakville Performing Arts Centre Festivals & Events Gaming Pick Your Own	$30-$80 FREE - $15/person
Interpretation	Ireland House Crawford Lake Conservation Area Discovery Landing/Burlington Waterfront Halton County Radial Railway	Free - $10
Education	Mountsberg Conservation Area Crawford Lake Conservation Area Willow Park Ecology Centre RBG	Free - $10
Cultural/Historical Understanding	Museums Burlington Art Centre Crossroads Centre	Free - $25
Skills Development	Golf, golf lessons Glen Eden Ski/Snowboard Centre Cycling Rock climbing Burlington Air Park (flight training) Canoe/Kayaking Recreation facilities	Free - $250
Adventure	Rock climbing Burlington Air Park (familiarization tours) Horseback riding Canoeing/Kayaking	Free - $50

Source: PRTD Survey

The practice of animating public spaces can be seen in places like Quebec City, where during the tourist season the streets in the old city come alive with street performers and artists. Business Improvement Areas, local Service Clubs and Chambers of Commerce typically initiate these activities in most communities. Communities within Halton do not regularly animate public spaces to generate interest in places where local residents and visitors congregate.

Halton offers a variety of cultural and entertainment experiences and features well known performers and artists. They are available at a variety of price points throughout the calendar year and usually are associated with annual events.

Activity	Performer	Approximate Price Range
Joseph Brant Museum Halton County Radial Railway Country Heritage Park Oakville Performing Arts Centre	 Chantal Kreviazuk (2006) Michael Burgess(2006), Colin James(2005), Randy Bachman (2005), Second	$3.50 $6 $7 $30 - $80

	City(2005/2006)	
Agricultural fairs & festivals		$5-$8
Burlington Sound of Music Festival	54-40(2006), Sloan(2005)	FREE
Oakville Waterfront Festival	Bedouin Soundclash (2006) Philosopher Kings (2006) Tom Cochrane (2005)	$13 - $15
Bang-O-Rama Optimist Fun Day		$7.50

Source: PRTD Survey

Halton offers an excellent selection of dining experiences. The region boasts a significant number of dining options that feature well known accredited chefs and restaurants with extensive wine lists of more than 25 labels. These dining options are all available at a variety of price points and are available year-round.

In terms of retail shopping experiences, Halton has a long list of recognizable retailers, malls, factory outlets and discount stores with name recognition beyond the region. These include retailers like The Olde Hide House, Lee Valley, Lululemon, IKEA, H&M and Mountain Equipment Co-op (opening in Burlington in 2008).

The region also has a variety of medium to high-priced specialty stores, galleries, antique and artisan shops found in the towns and villages. Many of these are independently owned retailers who offer a unique selection of merchandise.

The area also has a number of equestrian tack shops to service the significant number of horse farms and stables. The vast majority of retailers and retail complexes are located in the southern part of Halton in proximity to the largest resident population.

Of note is the IKEA store located in Burlington. This store generates substantial traffic from the local market but more importantly from south western Ontario and western New York State due in part to its unique product line of home furnishing items. The Burlington store services shoppers from these geographic areas on a year-round basis.

The region has a significant number of sports related facilities and venues. These include indoor hockey and ice skating arenas, soccer fields and ball diamonds (some have lights for evening games), swimming pools, gymnasiums, and all-purpose play fields. Some of these facilities and venues have spectator seating. Most are owned and operated by the various municipal governments and have been built to be used by local residents. Some facilities are privately owned. This infrastructure may afford opportunities for hosting a variety of annual local, regional, provincial tournaments and competitions. Tourism Burlington has begun research into this area and could provide valuable guidance if a sports tourism strategy was pursued.

Satisfaction & Value

This section documents the extent to which Halton offers its guests a warm welcome, satisfies expectations, and offers value for money. The evaluation process has identified *how guests and outside marketers view the region against these attributes. It also evaluates how Halton is investing in improving performance in these areas.*

The Premier Ranked Tourist Destinations process identified a significant gap in customer satisfaction research. Neither Halton Region nor the majority of tourism businesses in the region have visitor experience data that can attest to guest experience. While Tourism Burlington gathers visitor statistics and does a visitor survey at key visitor intercepts, it does not specifically ask about satisfaction. This lack of visitor data on a region-wide basis is cause for concern.

Through industry consultations and peer-to-peer feedback, it appears that providing acceptable levels of service may not be an issue. One indicator to support this is that key experience and service price points are staying the same or trending upwards. In addition visitation numbers are trending upwards. Therefore one might conclude that guests are receiving some degree of value for money and are receiving acceptable levels of service and hospitality. Customer service evaluation can help identify whether or not customers are satisfied by their experiences, and where more work needs to be done to improve satisfaction. Without regular evaluation, one can only speculate.

Accessibility Rating

This section assesses the ease of getting to and traveling within Halton, the transportation modes that serve it and the importance of transportation to the tourist experience. The evaluation process has identified how accessible Halton is and how well that accessibility is being managed.

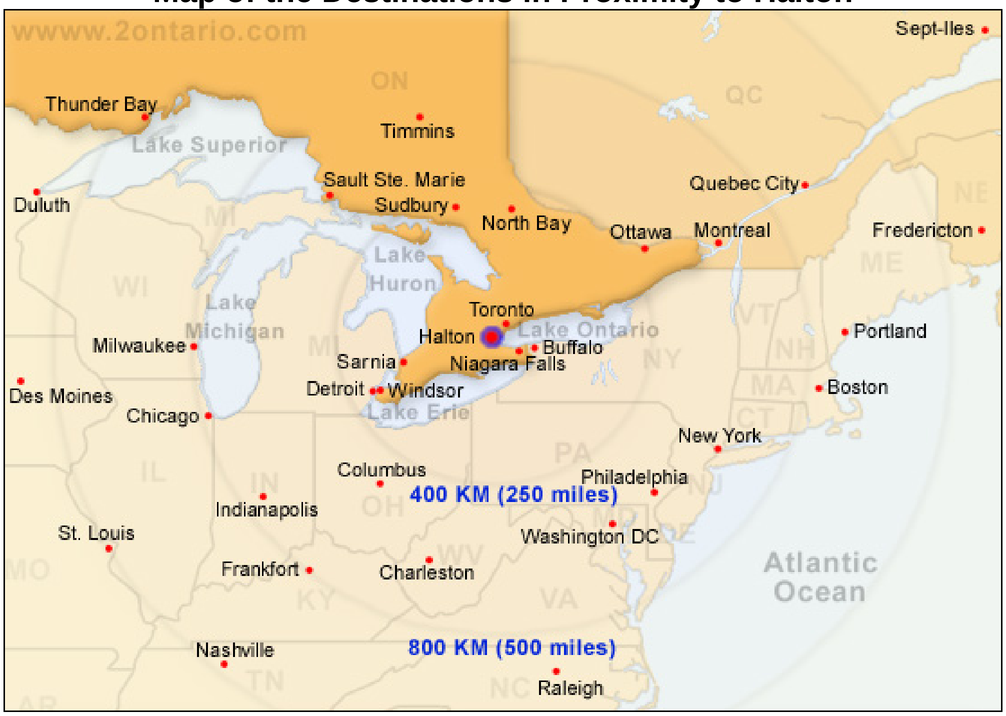
There are more than 6 million people living within a 3 hour drive of Halton and another 7.5 million people within a five-hour drive. Halton is ideally situated and in proximity to two major international gateways, being less than 30 minutes from Pearson International Airport (Toronto) and John Munro International Airport (Hamilton). Niagara Falls, another international gateway and major border crossing to the United States, is 45 minutes away.

For visitors who travel by automobile or motor coach, the drive to Halton is achievable with minimal effort and discomfort. Eight major highways pass through or are adjacent to the region. These include the 400 series of highways (400, 401, 403, 407, and 427), highway 7 and the Queen Elizabeth Way. These highways are well maintained year-round and offer more than adequate directional signage. Regional roads are also well maintained throughout the year. They are well signed and offer satisfactory visitor way finding through Tourism Oriented Directional Signage (TODS).

In terms of accessibility for visitors within Halton, traditional tourist transportation services are limited other than a personal or rented vehicle. Public transportation is an option, although it is more suited to the resident population and may not be conducive to visitor travel. These services include GO Transit, VIA Rail, Oakville Transit and Burlington Transit. Taxi cabs are available but not as easily accessible as in major cities. Shuttle or tour bus service has limited availability; however prearranged service from motor coach or shuttle services can be made. Given the significant geographic area of Halton, accessibility within the destination is an issue especially once visitors move beyond the southern part of the area. This can be a challenge when visitors, without their own transportation, wish to access the variety of tourism products available in the northern part of Halton.

Halton's waterfront location on Lake Ontario offers up to five metres of draft and a variety of marinas with more than 63 slips for transient boaters. Some of these slips are located within walking distance to visitor services and tourism experiences in Burlington and Oakville.

Map of the Destinations in Proximity to Halton



Accommodation Base

This section assesses the breadth and depth of the Halton's offering in terms of the range of accommodation classes available, their location, and the presence of higher end operators. The evaluation characterizes the region's accommodation base.

Halton offers visitors a variety of accommodation options with a total of 2,740 roofed guest rooms at a variety of price points close to Halton's distinctive core attractors. The region also has 728 RV parks and campsites. The accommodation inventory also includes branded well known chains.

Type Of Accommodation	Properties	# Of Rooms	Price Range
RV Park/Campground	5	728	$8 - $30
Bed & Breakfast	25	58	$50 - $200
Motel – Independent	9	62	$100 - $150

Motel – Chain	1	110	$50 - $100
Hotel – Independent	7	234	$65 - $125
Hotel – Chain	21	2,163	$65 - $200

Source: PRTD Survey

PERFORMANCE

Evaluation Rating for Halton ○

The ***Performance*** *measures identify the extent to which Halton is successful and recognized in the marketplace. By comparing Halton's performance attributes in terms of hard data conclusions, the region's actual performance against its primary competitors in a competitive marketplace context can be determined. Visitation statistics, accommodation occupancy levels, and critical acclaim are all industry standards to measure performance.*

The quality of the tourist experience and the destination's success in providing it is validated by:

- *Visitation*
- *Occupancy and Yield*
- *Critical Acclaim*

Visitation

This section assesses Halton's market performance in terms of visitation numbers and market share, attractiveness to different market segments, and different times of year.

Between 1998 and 2004, person visits to Halton increased by 40%, from 1,992,691 to 2,797,209.

The following breaks down visitation numbers and purposes of trip for Halton:

Halton Region	Total	From Ontario	From U.S.	From International
Person Trips	2,797,209	2,488,368	163,074	59,741
Same Day	2,060,302	1,979,365	62,989	17,948
Overnight	736,907	509,003	100,085	41,793
Overnight VFR	441,148	374,731	42,059	24,358
Overnight Business	62,115	51,373	27,467	3,182

Source: CTS / ITS, Statistics Canada, 2004

In 2004, same-day travel represented 73% of trips taken to Halton and overnight visits accounted for 27% of the trips. Compared to the province as a whole, the region attracts a higher proportion of same-day trips; 73% for Halton and 61% for Ontario. Halton attracted the majority, with 98% of its visitation from the Ontario market. Visitors do originate from the U.S.A. and international markets; however, Halton falls below provincial averages for visitors from outside Ontario's borders.

Total Person Visits by Length of Stay and Main Purpose							
Title/Year	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**
Total Visits	1,992,691	2,482,352	2,673,198	3,014,950	2,498,981	2,320,052	2,797,209
Same Day Visits	1,298,457	1,824,378	2,021,906	2,032,213	1,583,063	1,644,726	2,060,302
Overnight Visits	694,234	657,973	651,293	982,736	915,918	675,325	736,907
Overnight Pleasure Visits	146,909	157,661	99,976	152,336	167,997	131,322	137,297
Overnight VFR Visits	406,588	374,177	405,308	692,687	557,689	461,112	441,148
Overnight Business Visits	78,427	94,685	76,542	60,570	52,003	44,384	82,022
Other Overnight Visits	62,309	31,450	69,466	77,144	138,229	38,507	76,440

Source: CTS / ITS, Statistics Canada, 2004

Meetings & Convention (M&C) business totalled 62,115 trips representing 2.2% of total M&C trips to Ontario, 27,844 were day trips and 34,272 were overnight.

While it is difficult to directly align Halton's distinctive core attractors to definable provincial trip types the region is recognizing a small percentage of trips taken to Ontario for the purpose of rural and urban experiences, sightseeing or touring, or visiting a garden. The chart below indicates trips taken to the province and to Halton for outdoor recreation activities.

Outdoor Recreation Activities - Trips	**Ontario Total**	**Halton Total**	**Halton Same Day**	**Halton Overnight**
Swimming*	6,741,586	34,695	19,185	15,510
Other Water-based Activities*	1,358,956	1,279	0	1,279
Bird or Wildlife Viewing*	1,602,920	30,007	21,815	8,192
Cross-Country Skiing*	230,902	0	0	0
Snowmobiling*	529,223	0	0	0
Walking or Hiking*	9,791,940	104,760	49,701	55,059
Cycling*	1,677,071	3,665	3,665	0
Other Sport/Outdoor Activity*	6,573,310	218,716	96,815	121,902

Source: CTS / ITS, Statistics Canada, 2004

In terms of Halton's share of business for its distinctive core attractors (shaded area in chart below) compared to that of its major GTA competitors, Halton is not seeing its fair share when compared to York, Durham and Peel Regions.

Activities on Trip	Overnight # Halton Region	Overnight # York Region	Overnight # Durham Region	Overnight # Peel Region
Visit Friends/Relatives	647,683	670,742	774,701	782,681
Festivals/Fairs	29,885	20,253	43,944	52,077
Cultural Performances	53,713	23,525	92,546	68,393
Museums/Galleries	54,143	32,981	55,180	50,495
Zoos/Aquariums/Gardens	35,791	21,133	31,933	39,141
Sports Events	80,339	29,736	87,913	117,879
Shopping	396,228	338,697	464,737	544,171
Sightseeing	137,794	159,041	140,926	234,056
Nightlife	91,378	140,822	137,197	188,316
Casinos	64,149	23,954	29,799	49,524
Theme Park	31,699	48,197	31,182	40,437
National/Provincial Nature Parks	46,649	31,404	52,953	74,694
Historic Sites	62,743	48,207	51,001	61,754
Any Outdoor/Sports Activities	213,914	238,165	257,861	222,470
Golfing	13,771	39,290	71,915	36,559

Source: CTS / ITS, Statistics Canada, 2004

Occupancy & Yield

This section assesses Halton's market performance in terms of accommodation occupancy and guest expenditure levels. The evaluation compared occupancy and expenditure performance against industry and provincial averages.

Halton's commercial accommodation occupancy was 56.8% in 2005; this is lower than the provincial average of 65%. The average daily rate was $99.14 and revenue per available room (REVPAR) was $56.31. Source: PKF, 2006

In 2004, overnight visitors spent 2,169,828 person nights in Halton with 307,721 of these nights, or 14%, spent in roofed commercial lodgings such as hotels, motels, resorts, bed and breakfasts (B&Bs) and commercial cottages. 24,773 person nights, or 1%, were spent in local campgrounds or trailer facilities and 1,779,706 person nights, or 82%, were spent in private homes or private cottages (VFR).

Of the 307,721 person nights in roofed commercial lodgings, 39% were spent by residents of the province, 19% were spent by residents of other Canadian provinces and 43% were spent by international visitors (30% Americans; 13% other countries).

In 2004, total spending by guests to Halton was $185,528,075. Guests on same-day trips spent $71,788,557 and on overnight trips $113,739, 518. These dollar figures represent 1.6% and 1% respectfully of visitor spending within the province.

The average expenditure for guests on day trips was $34.84 compared to $62.56 average for Ontario. Overnight guests spend on average $154.35 compared to $270.27 average for Ontario. Source: 2004 CTS / ITS, Statistics Canada

2004 Visitation

QTR. 1	QTR. 2	QTR. 3	QTR. 4
16.8%	26.1%	26.5%	30.5%

Source: 2004 CTS / ITS, Statistics Canada

Critical Acclaim

This section addresses the extent to which Halton is recognized as a must-see destination, has a profile that contributes to the attractiveness of Ontario and Canada as a destination, and, is a "top-ranked" place to visit. The evaluation identifies if Halton is recognized as standing out from its competitors.

Halton cannot be considered a "must see/must do" destination. Within the markets the region draws from, several other destinations exist that would rank higher on the list of must see locations. In a competitive set they include Niagara Falls, Niagara-on-the-Lake, Toronto, Muskoka and Ottawa.

However, several of the region's distinctive core attractors and businesses do have critical acclaim. The Royal Botanical Gardens has attracted 480,000 visitors annually and it is often featured in travel literature and has recognition on a national and international scale. Glen Abbey Golf Course has already and will again host the Canadian Open golf championship and is widely recognized as one of the country's top golf venues. Both of these venues have been used in promotional material and advertising for both Ontario and Canada, giving each of them critical acclaim.

FUTURITY

Evaluation Rating for Halton ○

Futurity *identifies the extent to which Halton is investing in its future as a place with viable and continuing attractiveness to evolving markets. It includes the activities in place to raise awareness for the destination as well as the degree in which new investment in the form of capital dollars will be made to enhance its product offering. It also determines its capacity in a number of physical measures such as infrastructure.*

The ability for a destination to thrive from tourism into the future is sustained by:

- *Destination Marketing*
- *Product Renewal*
- *Managing within Carrying Capacities*

Destination Marketing

This section identifies to what extent Halton targets viable markets, invests in managing and promoting its tourism marketplace, and consults with the travel trade serving the region. The evaluation identifies if Halton is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.

Within Halton there are several recognized Destination Marketing Organizations (DMO) that are involved in tourism servicing and tourism marketing on a regional, provincial, national and international scale. Those DMOs are listed below along with their respective marketing slogan or positioning line:

- Tourism Burlington "Elevate Your Experience"
- Oakville "Indulge in a Little Oakville"
- Milton/Campbellville "Escarpment Country"
- Halton Hills "Head for Our Hills"

Halton Region is not a DMO but does work with the various tourism organizations in a limited basis.

It is clear that none of the organizations have sufficient funding to effectively target potential markets and market their respective destinations. Tourism Burlington may be the exception given that they recently put in place a destination marketing fee and are receiving the proceeds from the 3% fee charged to guests who stay in one of the many Burlington roofed accommodations. These funds are used by the DMO to market Burlington.

The DMOs do have forms of marketing plans and strategies; however, they don't track the effectiveness of their efforts in any tangible way. Tourism development plans don't exist within the individual destinations or on a region-wide basis and there are no processes in place currently to consider the tourism development issues that face the destination.

While customer service training is viewed as important, little or no region-wide initiatives are in place. Tourism Burlington provides Tourism Industry Ambassador Training on an annual basis which includes customer service training. Individual businesses conduct tourism hospitality or service training but there is a gap in delivering consistent quality training to front line hospitality workers. Without visitor survey data it is difficult to determine if hospitality and service performance is an issue and area of concern.

Product Renewal

This section identifies the extent to which Halton is making capital investments in its attractiveness into the future. The evaluation documents the status and magnitude of Halton's investment in the future.

In the past five years significant dollars have been invested in facility renewal and/or expansion and development with an emphasis on products that are directly or indirectly associated with tourism. A high percentage of this investment has occurred in the last two years. More than $20 million has been spent to either build new product or enhance existing product. There is evidence of an ongoing commitment to continually reinvest in programming and infrastructure development.

Even with the high degree of product investment there still are under performing and under developed tourism assets within Halton. Several public or not-for-profit attractions require capital improvements to remain competitive. Halton also has several products that are developed but under performing.

An opportunity exists to better position these products in order to generate the visitation they deserve. A good example of these types of attractions is the Canadian Golf Hall of Fame and numerous properties and facilities operated by Conservation Halton.

Managing Within Carrying Capacities

This section assesses the extent to which Halton is aware of, and manages within, its capacity thresholds specifically its local economy, ecosystems and soft services infrastructure, its guests' satisfaction levels, hard services infrastructure, and its administrative systems. The evaluation documents Halton's ability to manage the system that sustains it.

Tourist visits to Halton make a net positive contribution to the local economy. This is demonstrated by over $116,161,000 in direct, indirect and induced contributions to gross domestic product (GDP), $56,532,000 of labour income and salaries and 2,091 part-time, full-time and seasonal jobs. Total taxes generated as a result of visitor spending in Halton reached $72,952,000 in 2004, including $3,297,000 in municipal taxes that accrue to Halton Region. Stable investment and a vibrant skilled and semi-skilled labour force are also present within the region. Source: CTS / ITS, Statistics Canada, 2004

In some destinations growing tourism visitation impacts the local residents' cost of living; this is not the case in Halton. Housing costs have risen in the region due primarily to economic growth of the area and not as a result of a growing tourism market. Increased visitation has not threatened the visitor experience, so overcrowding and overuse are not being cited as reasons to not visit Halton. Traffic congestion and parking may be an issue in parts of the region during peak travel times especially at some of the many outdoor parks and recreation facilities.

Managing the carrying capacities of the natural systems that sustain local ecosystems and quality of life within Halton are well understood and monitored. Growth in tourism will not tax current and future infrastructure. Halton Region is prepared to understand and manage its futurity specifically related to water treatment and delivery capacity, sewage treatment and trunk capacity, road, transit, parking and trail capacity and the environmental effects of infrastructure expansions.

As it relates to understanding and capitalizing on the opportunities associated with a thriving tourism industry, the Local Municipal and Regional governments do not appear to have tourism-related objectives in their Official Plans. While the Local Municipalities and Halton Region as a whole are interested in attracting visitors, most have not formally recognized tourism as a key economic engine.

SUMMARY OF FINDINGS

At the outset of the report a measurement criteria was described that rates the destination's status related to its performance for its product, performance and futurity dimensions. After completing the Destination Performance Summary using the data provided through industry surveys and supplementary information it has been determined that the destination is lacking in a number of fundamental areas.

Product - A Tourist Destination provides a high-quality tourist experience, enabled through the destination's offerings of:

- Distinctive Core Attractors
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- An Accommodations Base

○ *No, the affirmation cannot be made or supported for the destination*

Strengths	**Weaknesses**
• Halton has an attractive collection of four-season tourism products • Halton's proximity to a major population base represents a significant market • Distinctive core attractors have both mass and niche appeal • Distinctive core attractors being located in the Provincially designated Greenbelt Area supports its attractiveness as it pertains to Natural Outdoor Attractions & Recreational Opportunities	• Distinctive core attractors offer *collective appeal* but they do not present an exclusive or unique product offering that would be considered superior to other destinations • Tickets or admissions to attractors, etc. are not easily accessed or purchased from outside the region • Traditional tourist transportation services are limited other than a personal or rented vehicle
Opportunities	**Threats**
• If the collective of Halton's distinctive core attractors were combined or packaged there could exist a reason for guests to stay for more than 24 hours or overnight • Some of Halton's distinctive core attractors line up with experiences visitors enjoy when they come to Ontario, there is potential market for Halton	• Many neighbouring destinations offer similar product experiences and opportunities

Performance - The quality of the tourist experience and the destination's success in providing it is validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim

○ *No, the affirmation cannot be made or supported for the destination*

Strengths	**Weaknesses**
• Between 1998 and 2004, person visits to Halton increased by 40%, from 1,992,691 to 2,797,209 • Several of the region's distinctive core attractors do have critical acclaim • The Royal Botanical Gardens attracts 480,000 visitors annually and is often featured in travel literature It has recognition on a national and international scale • Glen Abbey Golf Course is widely recognized as one of the country's top golf venues	• Compared to the provincial average, the region attracts a higher proportion of lower yield same day trips: 73% for Halton and 61% for Ontario • Halton falls below provincial averages for visitors from outside Ontario's borders. • Halton is not seeing its fair share of business when compared to York, Durham and Peel Regions for its core attractors • Halton's commercial accommodation occupancy was 56.8% in 2005; this is below the provincial average of 65%
Opportunities	**Threats**
• The Royal Botanical Gardens has recognition on a national and international scale • Glen Abbey Golf Course will host the Canadian Open golf championship and is widely recognized as one of the country's top golf venues	• The average expenditure for guests on day trips was $34.84 compared to $62.56 average for Ontario • Overnight guests spend on average $154.35 compared to $270.27 average for Ontario

Futurity - The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

○ *No, the affirmation cannot be made or supported for the destination*

Strengths	**Weaknesses**
• Halton has a number of Destination Marketing Organizations (DMOs) committed to growing tourism in	• The Regional Municipality of Halton is not a DMO but does work with the various tourism organizations in

their communities and to the Region • Tourism Burlington recently put in place a destination marketing fee and are receiving the proceeds from the 3% fee charged to guests who stay in roofed accommodations • Significant dollars have been invested in facility renewal and/or expansion and development areas associated with tourism • Tourists make a net positive contribution to the local economy • Total taxes generated as a result of visitor spending reached $72,952,000 including $3,297,000 in municipal taxes that accrue to Halton Region.	a limited basis • No region-wide customer service training initiatives are in place. • Several public or not-for-profit attractions require capital improvements to remain competitive
Opportunities • Halton Region is not a DMO but does work with the various tourism organizations in a limited basis • Tourism Burlington provides Tourism Industry Ambassador Training on an annual basis which includes customer service training, this could be easily rolled out to other areas in Halton • There is evidence of an ongoing commitment to reinvest in tourism programming and infrastructure development • The region has several products that are developed but under performing, opportunity exists to better position these products in order to generate higher visitation • Stable investment and a vibrant skilled and semi-skilled labour force are also present within the region • Growth in tourism will not tax current and future infrastructure	**Threats** • None of the DMO organizations have sufficient funding to effectively target potential markets • Tourism development plans don't exist within the individual destinations or on a region-wide basis • Local and regional governments do not have tourism related objectives in their Official Plans - most have not formally recognized tourism as a key economic engine

While these affirmations cannot be made for the Halton at this point in time, it should be noted that the destination has significant potential to improve as a visitor destination. Both Halton Region and tourism industry stakeholders should be encouraged that the PRTD work has been completed. The PRTD project has revealed gaps in the tourism offering but it also offers clear direction for improvement. It supports the premise that Halton has the opportunity to develop and emerge as a viable destination in the very near future.

RECOMMENDATIONS

Based on the findings the following recommendations and action steps have been developed in consultation with the Premier Ranked Steering Committee and tourism stakeholders within Halton. Both immediate and long-term action steps have been identified.

The primary and most immediate recommendation from Halton's PRTD project is the establishment of a Halton Tourism Alliance, which would be supported and facilitated by Halton Region Business Development. The establishment of a Halton Tourism Alliance will provide a focused, region-wide effort to address the competitive gaps identified through the PRTD process and move Halton's tourism sector to operate at the highest level it can achieve. The Halton Tourism Alliance would be responsible for implementing a multi-year work program.

Immediate-Term Recommendation – Halton Tourism Alliance

1. That Halton Region Staff consult with the PRTD Steering Committee and develop a Terms of Reference for a Halton Tourism Alliance, including the vision, goals and objectives, timeframe and performance measures, and an appropriate governance model to reflect the unique nature of this industry-supported, multi-jurisdictional tourism committee and report back to Regional Council regarding the Terms of Reference in the fourth quarter of 2007.

2. That the Halton Tourism Alliance be formally established in the first quarter of 2008 supported and facilitated by Halton Region Business Development with strong tourism industry stakeholder involvement. The Halton Tourism Alliance would be responsible to implement the mid-term and longer-term recommendations (nos. 3-8) as set out below.

Mid-Term Recommendations – 2008 to 2009

3. That the Halton Tourism Alliance clearly define the roles and responsibilities of tourism stakeholders in Halton, for example:
    - Halton Region – would focus on facilitating future destination development, hospitality training, and the enhancement of experience delivery.
    - The DMOs, Chambers of Commerce, Economic Development Departments and BIAs would have a collective focus on experience development, packaging and cross-marketing.

4. That the Halton Tourism Alliance develop and implement an industry supported Tourism Destination Development Action Plan facilitated by Halton Region. The Destination Development Action Plan would:
    - Rally the tourism industry.

- Align with the Province's Tourism Strategy, Regional & Municipal Strategies (including tourism strategies) and the Halton Economic Development Strategy implementation.
- Include a series of initiatives designed to grow tourism and to convert day trippers to Halton to overnight guests, growing annual tourism expenditures and revenues. These initiatives would include:

  a) Product development associated with Halton's distinctive core attractors and those assets that are under performing and / or under developed;

  b) Event development – enhance existing events, add new ones in the non-peak seasons;

  c) Improvements to experience delivery, with a focus on customer service training across Halton;

  d) Initiatives that capitalize on the physical setting and natural heritage attributes, such as the Lake Ontario waterfront and the Niagara Escarpment, including the Bruce Trail;

  e) Tourism industry "partnering sessions" to encourage cross promotion of tourism experiences within Halton, no matter what the municipal boundaries might be; and

  f) Implementation of the Ministry of Tourism - *Tourism Inc.* training sessions across Halton to educate and better equip the industry in making their tourism products and experiences market ready.

5. That the Halton Tourism Alliance introduce a Tourism Awareness Campaign to reinforce the importance of tourism by targeting:
   - Owner/operators – focus on dining & retail sectors, reinforce that they are in the tourism business.
   - Local governments – try to get tourism on the municipal agenda.
   - Local influencers, resident groups, service clubs.
     - Use the Ministry of Tourism's *"Making the Case for Tourism"* tool kit.
     - Use unpaid media strategy.
   - Front-line tourism staff, to better equip these individuals to be able to speak to Halton's tourism assets with their customers.
6. That the Halton Tourism Alliance create a Halton Sports Tourism Task Force that would:
   - Explore the opportunities (if any) associated with the development of a regional sports tourism strategy.

- o Understand current venues and facilities and their capacities.
- o Dialogue with local sport organizations to determine if there is a will to attract more tournament activity.
- o Secure a more frequent rotation for the Canadian Open Golf Championship at Glen Abbey Golf Club.

7. Explore possibilities of a coordinated approach to Destination Development / Marketing Fund for the entire region, one that is founded on a spirit of trust and cooperation and which maximizes existing local efforts
   - o Establish parameters and a formula to make this happen
   - o Follow the "Best Practices" of Tourism Burlington and other destinations
   - o Allocate funds for both tourism development and marketing

Longer-Term Recommendations – 2009

8. Address the inter-regional transportation issues that exist in linking north and south Halton by identifying a series of possible solutions that capitalize on both public and private sector solutions
   - o Initiate dialogue with local public transportation authorities as well as private sector transportation operators in order to explore possible long-term solutions to this challenge
   - o Bring forward issues and potential solutions through Halton Region's Sustainable Halton planning process.

CONCLUSION

Tourism has tremendous potential to enhance job and wealth creation within the Local Municipalities while contributing to the quality of life for all residents. The implementation of the recommendations in partnership with Local Municipal efforts supports building and diversifying jobs and economic growth. The Premier Ranked Tourist Destinations project provides a database of critical baseline data that paints a clear picture of Halton's strengths and weaknesses and provides direction to pursue improved tourism industry success and augment Local Municipal tourism efforts. The process involved several critical steps along the way and a serious commitment and investment of time by the industry partners involved.. One result of this project is an expanded network of area stakeholders who have a more cohesive focus on solving ongoing and future tourism challenges.