What is Tourism?
People taking an overnight or same day trip of over 40 kilometres for non-routine activities
2018: Canada's Best Year Ever!

Total Arrivals: 21.1M

- Canada
- US: 14.4M (1%)
- Mexico: 404K (5%)
- UK: 792K (3%)
- Germany: 406K (1%)
- France: 604K (5%)
- China: 737K (6%)
- Japan: 251K (15%)
- S. Korea: 246K (16%)
- India: 287K (15%)
- Australia: 349K (3%)

Overseas visitors reached an all-time high of 6.7M, representing 32% of total arrivals.

Direct air capacity soared by 6% to the highest level ever and represents an additional 2M seats on inbound flights.

*Percentages shown are shifts compared to 2017.

Stats shown are overnight arrivals to Canada, single day trips by land are excluded.

Direct air capacity figures are preliminary estimates and are subject to change. Refer to the Dec 2018 Snapshot report for more details.

Quick Facts About Tourism in Ontario (2016)

- $26.8B in visitor spending (5.9% vs. 2015)
- $11.8B total tax revenue (4.4% vs. 2015)
  - $1.2B municipal
  - $5.1B provincial (4% vs. 2015)
  - $5.4B federal (3.8% vs. 2015)

- 188,000 businesses
- 391,000 jobs
- 144 million annual visits

Source: Ontario Ministry of Tourism, Culture and Sport (2018)
142 Million Consumers within a Day’s Drive
The Tourism Industry Structure in Ontario

Operators
- Ministry of Tourism, Culture and Sport
- Federal Partners (ie. Destination Canada)
- Agencies (ie. Destination Ontario)
- Other Ministries
- Sector Associations (ie. OFSC, ORHMA)
- Tourism Industry Association of Ontario (TIAO)
- Regional Tourism Organizations (RTOs)

Consumers
- Destination Marketing Organizations (DMOs) Grey County
- Hanover
Tourism is a Team Sport

**Internal Stakeholders**
- Destination Canada
- MTC&S
- Destination Ontario
- Sector Assoc
- TIAO
- RTO7
- Grey County
- The Blue Mountains
- BMVA
- SGB
- CofC
- BIA
- Businesses - Operators

**External Stakeholders**
- Consumers
  - Long Haul
  - Mid Haul
  - Short Haul
  - Local/VFR Visiting Friends & Relatives

**Economic Impact Increases**

**Partners**
- Sector Assoc
- TIAO
- SGB
- CofC
- BIA
Grey County Tourism

(DMO) Destination Marketing Organization for Grey County.

Mandate: to support Grey County’s Goal 1 – *Grow the Grey County Economy* - through *tourism development* and *marketing*.

Annual Budget = $592K
Grey County TAC (Tourism Advisory Committee)

Purpose:
To strategically support the County of Grey's goal in its corporate strategic plan to grow the Grey County economy and specifically to implement the Tourism Destination Development Action Plan.

2019-22 Tourism Advisory Committee – Public Members
Chair: Andrew Siegwart - President / Blue Mountain Village Association
Vice Chair: Jim Halliday - Thornbury
Joel Dawson – Owner / Free Spirit Tours
Jim Diebel - Owner / Hanover Holidays
Andrea O’Reilly - Marketing / Georgian Hills Vineyards

2019 Tourism Advisory Committee – County Council Representatives
Sue Carleton – Deputy Mayor, Township of Georgian Bluffs
Shirley Keaveney – Deputy Mayor, Municipality of Meaford
Grey County DMO Working Group

Purpose:
Work to quantify the value of tourism in the area, share ideas and work together to solve issues and enhance tourism offerings.

2019 Members
April Marshall – Economic Development Manager – Town of Hanover
Economic Development - West Grey
Glen Walker – Economic Development Officer – Southgate
Michele Harris – Director, Economic & Community Development – Grey Highlands
Andrew Siegwart - President - Blue Mountain Village Association
Tim Hendry – Communications & Economic Development Coordinator – Town of The Blue Mountains
Melissa Crannie – Tourism Marketing Coordinator – City of Owen Sound
Melissa Twist – Regional Tourism Manager – South Georgian Bay Tourism
Steven Murray – Economic Development Officer – Municipality of Meaford
Kaleena Johnson – Manager, Customer & Media Relations – Owen Sound Transportation Company
# Grey County Destination Development Action Plan (DDAP)

**THE DDAP’S GOAL**
Increase sustainable tourism revenues through managing & marketing Grey County as a tourism destination.

<table>
<thead>
<tr>
<th>STAKEHOLDER ENGAGEMENT</th>
<th>DESTINATION MANAGEMENT</th>
<th>MARKET RESEARCH &amp; TRACKING</th>
<th>RESOURCE ALLOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilitate <strong>collaboration</strong> ensure stakeholders are <strong>well informed</strong> of County activities</td>
<td><strong>Product/experience development &amp; marketing</strong> of Grey County</td>
<td><strong>Quarterly Report card</strong> measures key KPIs, <strong>Snapshot of the ‘State of Tourism in Grey</strong></td>
<td>Each DDAP pillar is clearly lead by one staff member, professional development is a priority.</td>
</tr>
</tbody>
</table>

Alison Theodore  
Heather Aljoe  
Bryan Plumstead
Pillar 1: Stakeholder Engagement
2019 Priorities

- Tourism Week activities
- Continue our quarterly newsletters
- Improve industry website with updated site navigation and content
- Introduce a CRM to industry database
- Host/Partner 6 Tourism Talks
Pillar 2: Destination Management
2019 Priorities

- Develop 2019 Marketing Strategy - seasonal campaigns.
- Closer integration of media influencers with marketing campaigns.
- Website overhaul to include fresh new content, mapping updates,
- Development of packages and itineraries; outdoor adventure
  (cycling/trails), food/culinary and arts & culture.
I grew up skiing at Blue Mountain with my family. We made the drive up Airport Road at least once a week to ski as a family. I know it very well. When my partner Colin and I settled in Toronto for a brief stint to pursue careers, the weekly journeys began anew. At ourselves heading up to Grey County every weekend to ski, bike and camp. I still recall the feeling of dread as we headed south 5 evenings, wishing we could stay.

Grey County’s Music Scene Attracts Exceptional Talent

Rob and Josi Elder
Passionate Local Musicians

Grey County allowed us to hone our skills onstage and introduced us to a massive community of aspiring musicians and music lovers.

Grey’s Beacon of Community Spirit

Keith Davidson
Community and recreation activist

I try to make a difference in my community by becoming involved.

Rheanna Kish
Owner of Pom Pom Treat Hut and co-creator of the Come to our Table South Georgian Bay Cookbook.

From weekend warrior to local business owner
Social Media Posts (2019/18)

- **Visitgrey**: This rustic bakery and cafe is one of the... View Insights
- **Visitgrey**: Blue Mountain Village... View Insights
- **Visitgrey**: Thornbury Bakery Cafe... View Insights
- **Visitgrey**: Thornbury Ontario
- **Visitgrey**: Thornbury Farmers Market
- **Visitgrey**: Farmer's Pantry
- **Visitgrey**: The Blue Mountains, Ontario
- **Visitgrey**: Grey County Colour It Your Way
Pillar 3: Market Research & Tracking

2019 Priorities

- Complete Industry & Consumer Survey
- Share results as Industry Dashboard
- Undertake Research & Data Analyst Project
- Mobility data project linked to PRIZM
#TourismMattersinGrey

**Demand**
- Tourists / Visitors

**Supply**
- Commodities
- Businesses
- Industries

**Benefits**
- GDP
- Employment
- Taxes

Diagram showing the interconnections between travelers, commodities, businesses, and economic benefits like GDP, employment, and taxes.
How We Measure Tourism – Grey County

Demand
Tourists / Visitors

2.7 million visitors (2016)
(not including US & Overseas)

Any overnight trip
Same day trip > 40 kilometres for non-routine activities.
How We Measure Tourism – Grey County

WHY THEY COME

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasure</td>
<td>53%</td>
</tr>
<tr>
<td>VFR</td>
<td>32%</td>
</tr>
<tr>
<td>Shopping</td>
<td>3%</td>
</tr>
<tr>
<td>Business</td>
<td>7%</td>
</tr>
<tr>
<td>Other Personal</td>
<td>4%</td>
</tr>
</tbody>
</table>

TOP VISITORS ORIGINS

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro Toronto</td>
<td>16%</td>
</tr>
<tr>
<td>Bruce County</td>
<td>14%</td>
</tr>
<tr>
<td>York Regional Municipality</td>
<td>13%</td>
</tr>
<tr>
<td>Peel RM</td>
<td>12%</td>
</tr>
<tr>
<td>Waterloo Regional Municip.</td>
<td>8%</td>
</tr>
<tr>
<td>Halton RM</td>
<td>8%</td>
</tr>
<tr>
<td>Grey County</td>
<td>7%</td>
</tr>
<tr>
<td>Wellington County</td>
<td>6%</td>
</tr>
<tr>
<td>Simcoe County</td>
<td>3%</td>
</tr>
<tr>
<td>Hamilton/Wentworth</td>
<td>2%</td>
</tr>
</tbody>
</table>
Blue Mountain Visitors 2018 – Mobile Data Extract
How We Measure Tourism

Supply
Commodities
Industries
Businesses

1,337 Tourism-Related Businesses (2016)
13% of Total

TOP 10 ACTIVITIES

- VFR
- Beach
- Sightseeing
- Hiking
- Attend Sports Events
- Playing a Sport
- Cross-Country Skiing
- Skiing/Snowboarding
- Shopping
- Camping

Regional Tourism Profile 2016 – Grey County (MTC&S)
How We Measure Tourism

Benefits
GDP
Employment
Taxes

$333.7 Million Tourist Expenditures (2016)
(not including US & Overseas)

ITEMIZED VISITOR SPENDING

42%

17%

13%

11%

18%

Retail/Other

Food & Beverage

Accommodation

Transport

Recreation/Entertainment

Regional Tourism Profile 2016 – Grey County (MTC&S),
How We Measure Tourism

Benefits
GDP
Employment
Taxes

8,868 jobs in Tourism Related Businesses* (2016)
(19% of Grey County total jobs)

2,803 jobs directly supported by Visitor Expenditures**
(6.2% of GC total jobs)

$3.1 million in municipal taxes**

*OMAFRA Analyst, **TREIM (MTC&S)
The Economic Impact of Tourism in The Blue Mountains

- Creates jobs, new businesses and products
- Attracts investment
- Empowers communities to grow and innovate
- Preserves heritage
- Spurs growth and improves overall quality of life
Tourism Impacts in The Town of The Blue Mountains

Direct Impact of Tourism

Businesses
- Accommodation
- Entertainment
- Attractions
- Culinary

Sectors
- Accommodation Services
- Food & Beverage Services
- Transportation
- Retail
- Entertainment & Recreation Services

Spending
- Resident
- Visitor
- Government
- Business

Indirect Impact of Tourism
- Manufacturing
- Finance & Real Estate

Total Impact of Tourism
- Tourism Receipts
- To Region
- To Community
Town of The Blue Mountains

Supply
Commodities
Industries
Businesses

178 Tourism-Related Businesses* (2016)
10% of Total

<table>
<thead>
<tr>
<th>NAICS Code</th>
<th>Description</th>
<th>*Tourism Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>44-45</td>
<td>Retail trade</td>
<td>78</td>
</tr>
<tr>
<td>48-49</td>
<td>Transportation and warehousing</td>
<td>6</td>
</tr>
<tr>
<td>51</td>
<td>Information and cultural industries</td>
<td>12</td>
</tr>
<tr>
<td>52</td>
<td>Finance and insurance</td>
<td>1</td>
</tr>
<tr>
<td>56</td>
<td>Administrative and support, waste management</td>
<td>1</td>
</tr>
<tr>
<td>71</td>
<td>Arts, entertainment and recreation</td>
<td>23</td>
</tr>
<tr>
<td>72</td>
<td>Accommodation and food services</td>
<td>20</td>
</tr>
<tr>
<td>81</td>
<td>Other services (except public administration)</td>
<td>37</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>178</td>
</tr>
</tbody>
</table>
Town of The Blue Mountains

Benefits
- GDP
- Employment
- Taxes

(36% of total jobs)

<table>
<thead>
<tr>
<th>NAICS</th>
<th>Description</th>
<th>Tourism-Related Jobs*</th>
</tr>
</thead>
<tbody>
<tr>
<td>44-45</td>
<td>Retail trade</td>
<td>459</td>
</tr>
<tr>
<td>48-49</td>
<td>Transportation and warehousing</td>
<td>35</td>
</tr>
<tr>
<td>51</td>
<td>Information and cultural industries</td>
<td>14</td>
</tr>
<tr>
<td>52</td>
<td>Finance and insurance</td>
<td>6</td>
</tr>
<tr>
<td>56</td>
<td>Administrative, waste mgmt and remediation</td>
<td>43</td>
</tr>
<tr>
<td>71</td>
<td>Arts, entertainment and recreation</td>
<td>371</td>
</tr>
<tr>
<td>72</td>
<td>Accommodation and food services</td>
<td>921</td>
</tr>
<tr>
<td>81</td>
<td>Other services (except public admin.)</td>
<td>143</td>
</tr>
</tbody>
</table>

1992

*OMAFRA Analyst
Tourism Opportunities in Town of The Blue Mountains

• Blue Mountain Village & Resort
• Apple Pie Trail
• Cider, Wine & Beer
• Local Food - Culinary
• Agri-tourism
• Cycling & Trail development
• Thornbury, Clarksburg downtown
Tourism Challenges/Opportunities in Grey County

• Workforce Issues – Attainable housing/Transportation
• Sustainability of tourism industry
• Building stronger partnerships with local businesses
Thank You! Have a Grey’t Summer...