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

December 8, 2017

Methodology to Date

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

- Project launch
- In-person project launch meeting
- · Steering Committee interviews
- Site visits & in-market consultations
- Desk research & analysis
- Competitive analysis

Phase 1: Discovery

Confirm buy-in to project and obtain alignment on outcomes; conduct full scan and systematic analysis of all background materials (pages 7 and 8 of the RFP) and a competitive destination audit.

- Survey Analysis
- External Stakeholder Interviews
- In-person Workshop

Phase 2: Engagement

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

Phase 3: Assessment

Conduct detailed analysis of all HR, economic, investment, trade, product development and marketing issues; Refinement of themes into strategy pillars with associated strategies, tactics and impact measurement criteria.

Phase 4: Activation

Develop final strategy and action plan; Conduct training session with key Stakeholders; Communicate and secure buy in of strategy with stakeholders in the Northern Bruce Peninsula—and check in on the Steering Committee at the 6 and 12 month marks to ensure progress.

The observations in this report are based on feedback from the Steering Committee, desk research (literature reviews), in-market site visits, an in-person workshop and consultations as per the below:

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

Northern Bruce Peninsula's Current Tourism Situation & Main Issues

Current Situation

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

Main Issues

Currently, the most prominent issues revealed include: increased visitor numbers during the peak tourism season; increased pedestrian and vehicle traffic; litter; parking; insufficient restroom facilities; lack of accommodations and food/beverage services to meet visitor demand; lack of availability and affordability of accommodations for tourism staff; perceived, potential or actual environmental impacts on natural assets; impacts on septic systems; potential impacts on water table / water quality; competition/displacement of local residents affecting quality of lifestyle; perceptions of 'over-tourism' affecting quality of guest experience; historically limited collaboration between key stakeholders; insufficient information to set expectations and elicit desirable behaviours from visitors.

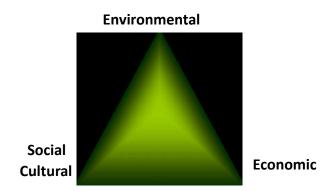
Our Vision for the Northern Bruce Peninsula

Follow the Leader

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

Vision: Northern Bruce Peninsula

Key Stakeholders of the Northern Bruce Peninsula envision a future where tourism is developed to manage and mitigate negative impacts, promote conservation of natural, cultural and heritage assets, maintain quality of lifestyle for local residents, encourage sustainable tourism investment and provide dividends for tourism operators, support employment opportunities, encourage amenity migration, attract desirable types and behaviours of visitors, and inform, educate and facilitate appreciation of these values from visitors.



Northern Bruce Peninsula's Future Opportunity

Collaboration is Opportunity

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

Follow the Leader

A pillar of Canada's new Vision for Tourism (November, 2017) is to distinguish Canada as a premier tourism destination through Canada's national parks. The Government is **maintaining and restoring ecological integrity within Canada's national parks** while continuing to **provide meaningful services and experiences to visitors**. The Government has established strict development limits to ensure ecological integrity in Canada's national parks. Parks Canada has put forward a rigorous development review and environmental assessment process to ensure all development proposals comply with park-wide ecological objectives and that the park's ecological integrity is maintained. Parks Canada is in the process of developing strategies to **help grow local sustainable tourism industries and create jobs**.



Survey Results

The following pages provide a synopsis of the key survey results.

There was a very high level of responsiveness to this survey with 98 complete responses, representing 34% of total invites. This level of engagement confirms that tourism is a priority for this community. Respondents represented a diverse range of sectors with over 35% representing private citizens.

The following is the breakdown of respondent's years involved in the tourism industry and their sector of involvement, respectively, within Northern Bruce Peninsula.

More than 5 years	57.14%	56
I am not involved in the tourism industry within Northern Bruce Peninsula	23.47%	23
2 to 5 years	12.24%	12
1 to 2 years	4.08%	4
Less than 1 year	3.06%	3

Loss than I year			
Citizen		35.71%	35
Other (please indicate)	Responses	25.51%	25
Private sector business – accommodation (B&B)		10.20%	10
Private sector business - accommodation (vacation rental)		4.08%	4
Private sector business - attraction (outdoor adventure)		3.06%	3
Private sector business - restaurant /food/beverage		3.06%	3
Private sector business – retail/shopping		3.06%	3
Private sector business - accommodation (hotel)		2.04%	2
Private sector business - accommodation (motel)		2.04%	2
Private sector business - attraction (nature based)		2.04%	2
Private sector business - attraction (sport based)		2.04%	2
Industry Association/Non-Profit		2.04%	2
Federal Government (i.e., Parks Canada)		2.04%	2
Municipal Government		2.04%	2
Private sector business - attraction (arts and culture)		1.02%	1
Private sector business - tour operator		0.00%	0
Private sector business - transportation company		0.00%	0
First Nations		0.00%	0

The 25.51% of 'other' sectors included the following with corresponding percentages of all responses:

Non-profit / Association – 8 (8%)
Mixture of private businesses – 4 (4%)
Citizen – 4 (4%)
Other – 4 (4%)
Cottage rental – 2 (2%)
Seasonal property owner – 2 (2%)
Campground – 1 (1%)

Survey Results - Q1 - Q4

Survey questions 1-4 inquired about Northern Bruce Peninsula's tourism assets to help identify underutilized and underdeveloped assets as well as assets that would add value to the visitor experience.

While we know that Northern Bruce Peninsula's natural beauty attracts visitors to the region, it was evident from the survey responses that there are sites and assets that could be more utilized and/or developed to enhance the visitor experience. Such potential assets are listed in detail on page 12.

In addition, it was also clear that more assets (restaurants, experiences, facilities, etc.,) are needed to bring the visitor experience to an adequate level.

The circled words in this slide represent repeated mentions of assets and/or asset categories that should be better developed and/or better utilized (top), as well those that are currently lacking and hindering the overall visitor experience (bottom).

Underutilized and/or Underdeveloped

Opportunity Devil's Monument Visitors Golf Course Tourist

Flower Pot Lake Quiet Trails Outside of Tobermory

Activities houlder Seasons Boat Tours Dyers Bay

Developed Leisure Lions Head Capacity

Guided Experiences Money Dark Skies Infrastructure

Missing assets that would add value



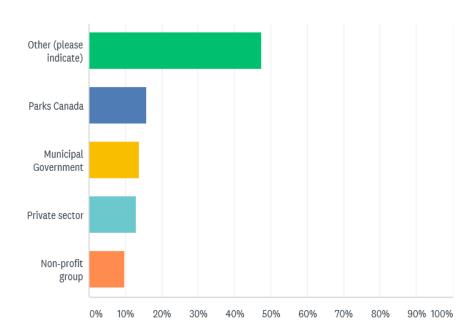
Survey Results - Q5 - Q11

Below are summaries of the responses for the current state of each category in relation to Northern Bruce Peninsula's tourism.

Category	Summary Response
Service Delivery	Responses were a mix between 'needing improvement' and 'good.' There are enough negative responses to be concerned about the service delivery including issues such as the lack of services and amenities, staff challenges and seasonality issues.
Growth	Responses represented a diverse range of opinions between positive / excellent growth and too much growth, as well as numerous mentions of unmanaged growth.
	There were also respondents who would like to see more growth as well as those who would like to greatly reduce the amount of tourism activity.
	The discrepancy in these results is expected due to the divide and varied interests between full-time residents, seasonal cottage owners, business owners and environmental groups.
Contribution to the Local Economy	The overall consensus was that respondents understand that tourism is the main contributor to Northern Bruce Peninsula and essential for job creation, however, frustrations do exist with regards to the economic dispersal and associated negative effects of the tourism growth.
Seasonality	The tourism season is a summer season existing mostly from May – September, although the season has extended into shoulder months over the last 2 years.
	Many respondents believe there is an opportunity for a winter season, however major concerns exist with regards to securing staff, unpredictable weather, inadequate services available and not enough visitors. While many would like to see a winter offering, there is the obvious issue of which comes first – the visitor or the open businesses?
Dispersal	The feeling of respondents is that the dispersal of visitors is poor, limited, needs improvement and requires better management.
Environmental Impact	The amount of visitors has become a major concern on the environment. More can and needs to be done by the community and partners to help preserve the environment with the recent influx of visitors.
Cultural & Social Impact	Tourism has created an obvious change in the way of life for local residents in Northern Bruce Peninsula— change of pace, work/life balance, accessibility to local assets and services, etc.
	Most think that there is room for improvement in educating visitors, residents, businesses, and Municipal Council; such as cultural education of the region and species, including indigenous experiences, nature education and awareness, guided tours etc.
	The answers in this question portrayed a divide between year-round residents and seasonal cottagers.

Survey Results – Tourism Governance

Q15 – What organization is best placed to lead the development of tourism in Northern Bruce Peninsula?



The reason for the large contingency of "other" responses is that 36 people (36% of total respondents and the most popular response) would like to see a combination of these groups lead tourism in the region.

Comments are stressed that the private sector must be involved but in a collaboration with all mentioned parties.

Stakeholder Engagement – Interview Results – Key Themes

We spoke with a diverse group of tourism stakeholders as well as concerned citizens. The general feeling is that tourism is essential for the region, combined with the frustration of the substantial and unmanaged tourism growth in the last 3-4 years. The following is a summary of the key themes that were identified throughout the stakeholder interviews, and will be addressed in the key pillars of the Sustainable Tourism Management Plan.

1. Challenges with Growth / Visitor Experience

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

2. Potential Asset Development:

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

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

Package Development:

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

3. Seasonality

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

4. Visitor Experience

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

5. Private / Business Investment

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

Stakeholder Engagement – Interview Results – Key Themes, cont'd

6. Tourism Governance / Management

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

7. Workforce Challenges

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

Other observations:

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

Stakeholder Engagement – Workshop Results

The below strategic priorities were identified throughout the stakeholder workshop and will help form the recommendations of for strategy.

	SOCIAL / CULTURAL	POLITICAL
•	Develop and communicate a cohesive brand agreed to by residents and industry (i.e., quiet, calm, respect) Develop indigenous visitor experiences Enhanced tourism education and communication for tourism businesses, visitors, residents, and Municipal Council	 Increase Tourism Funding Parking revenue Tourism Fee this wouldn't hit the day-trippers Tourism Development Fund – OMTCS May be able to support specific tourism projects Enhance government relations Advocacy for land claim settlement
	ENVIRONMENTAL	VISITOR EXPERIENCE
•	Environmental Protection • Limit # of visitors & private vehicles Water & sewage systems Need infrastructure masterplan Education and awareness of current land claim	 Develop indigenous visitor experiences Develop knowledge based experiences Limit visitation to key areas Better and earlier visitor education Collaboration, co-marketing and cross-promotion throughout region More experiences and services
	ECONOMIC	
•	Workforce	



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

There are a number of different ways to evaluate where the Northern Bruce Peninsula is at as a destination. This section provides a summary of the SWOT analysis. The SWOT was created based on the findings from the background secondary research, stakeholder interviews, and market research. The SWOT analysis is useful for understanding the current and predicted drivers that will influence tourism in the Northern Bruce Peninsula and surrounding area. Planning for the tourism future of the Northern Bruce Peninsula needs to be predicated on a sound understanding of the destination's current tourism circumstances and market readiness.

SWOT

Strengths and Weaknesses primarily refer to matters inside the destination and are ones that can be addressed more directly. Opportunities and Threats are typically matters outside the destination, which are often harder to control.

Strengths, Weaknesses, Opportunities and Threats – Highlights

	STRENGTHS Beautiful natural environment and natural assets Unique and well-known diverse outdoor activities Strong presence and awareness of the region Leadership by community champions Strong volunteer community Culture and history of the region Access to visitor population base & international airport	 WEAKNESSES Actual and perceived negative impacts of tourism (i.e., congestion, parking, noise, garbage, etc.) Potential differences in perceived impacts versus actual impacts Limited product and experiences visitors can purchase and engage with Most activities/attractions are low-cost or free Limited accommodation options Ubiquitous workforce challenges Infrastructure limitations (i.e., roads, parking, sewer, septic, water) Limited amenities/services (i.e., transportation, accommodations, food/beverage, retail, capacity) Lack of awareness of the contribution of tourism Lack of leadership and agreement on community tourism priorities
ŀ	ODDODTHAUTIEC	Limited industry statistics and research on the region TURE ATC
	OPPORTUNITIES Dispersal strategies including product and experience development	THREATS
	 Dispersal strategies including product and experience development, product packaging and marketing and messaging 	 Negative impacts of continued growth of tourism without collective sustainable tourism management strategies
	 Positioning the Northern Bruce Peninsula as a leader in sustainable 	
	tourism management	Changing visitor characteristics and visitor trends
	 Enhanced marketing and messaging to attract quality tourists 	 Increasing competitiveness of other sustainable destinations within
	within niche markets	Ontario
	 Extended season into shoulder months and/or winter seasons 	Degradation of natural, social and cultural assets
	 Education and training for tourism businesses, residents, visitors, 	Damage to destination reputation
	and Municipal Council	
	Enhanced regional and community collaboration	
	Create an environment attractive to sustainably-oriented	
	entrepreneurs	
	 Indigenous tourism development 	17

Strengths in Detail

Strengths primarily refer to matters inside the destination and are ones that can be addressed more directly.

Strengths of Northern Bruce Peninsula revealed the Natural Landscapes, Environment, and History of the region as key attributes and attractors for locals and visitors alike.

- Beautiful natural environment and natural assets
- Unique and well-known demand generators
- Strong presence and awareness of the region
- Strong volunteer community
- Beautiful limestone coastal lake geology
- The Grotto and Flowerpot Island
- Bruce Peninsula and Fathom Five National Parks
- The quaint community of Tobermory
- The village of Lion's Head
- Close proximity to GTA Canada's largest outbound tourism market
- Geology Niagara Escarpment, karsts, beaches, wetlands
- Flora 1,000 year old cliffside cedars,
- Fauna bears, birding, butterflies, orchids
- Lighthouses
- Dark Skies
- Sunken Ships
- Arts, Culture, and History
- Indigenous Tourism
- Diversity of outdoor activities
- Leadership by Community Champions

Priority Strengths

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

Weaknesses in Detail

Weaknesses primarily refer to matters inside the destination and are ones that can be addressed more directly.

Weaknesses of Northern Bruce Peninsula revealed a lack of Strategic Planning, Tourism Management Resources, Infrastructure, and Availability of Information to set Visitor Expectations as key weaknesses inherent in the region.

- Most activities/attractions are low-cost or free
- Limited accommodation options
- Limited interaction and engagement between the Municipality, the County, and tourism businesses and between tourism businesses
- Limited industry statistics and research on the health of the Peninsula tourism industry outside of Parks Canada
- Limited funds dedicated to tourism
- Infrastructure limitations: roads, parking, sewers, septic, water, capacity
- Limited amenities/services: transportation, accommodations, food/beverage, retail, capacity
- Lack of awareness of the contribution of tourism
- Potential differences in perceived impacts versus actual impacts
- Lack of agreement on community tourism priorities
- Lack of housing and affordability for workers
- Lack of political will
- Actual and perceived negative impacts of tourism in relation to the environment and local community (i.e., congestion, parking, noise, garbage, etc.)
- Limited product and experiences visitors can purchase and engage with
- Limited accommodation options
- Limited workforce
- Limited industry statistics and research on the health of the tourism industry
- Unclear leadership within tourism governance

Priority Weaknesses

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

Opportunities in Detail

Opportunities are typically matters outside the destination, which are often harder to control.

Opportunities for the Northern Bruce Peninsula revealed Guided or Facilitated Eco and Adventure Tourism activities, Information/Education/Marketing, Collaboration/Partnerships/Packaging, Extension and Dispersion of Seasons and Visitors, and Niche Product/Experience development as key potential initiatives.

- Improve alternative ecotourism offerings and connect throughout the broader peninsula
- Define, develop and maintain the region's quality of place
- Education and training for tourism businesses, residents, visitors, and Municipal Council
- Enhanced product and experience development
- Enhanced marketing: setting expectations; targeting of desired markets
- Position the Northern Bruce Peninsula as a leader in Sustainable Tourism Management
- Create an environment attractive to sustainably-oriented entrepreneurs
- Dispersal of travellers through indicators including enhanced product and experience development, product packaging and itinerary development, awareness and marketing
- Enhanced marketing and messaging to attract quality tourists within niche markets
- Extended season into other seasons (non-peak)
- · Enhanced regional and community collaboration
- Indigenous tourism development

Priority Opportunities

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

Threats in Detail

Threats are typically matters outside the destination, which are often harder to control.

Threats to the Northern Bruce Peninsula reveal Changing Visitor Characteristics, the Development of Free and/or Low Cost Attractions, Continued Growth of Tourism Demand, and Competition from other Sustainably-Oriented Destinations as key influences to monitor.

- Continued development of low-cost and free attractions
- Changing visitor characteristics
- Potential continued growth of tourism without collective sustainable tourism management strategies
- Ubiquitous workforce challenges
- Limited leveraging of tourism network resources
- · Limited empirical data on visitor management issues
- · Region lacks incentives for seasonal tourism investment
- Limited marketing and messaging alignment
- Continued unmanaged tourism growth
- Competition from other Ontario sustainably-oriented tourism destinations

Priority Threats

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



Northern Bruce Peninsula – Visitor Management

Tourism can bring many positive benefits to the Northern Bruce Peninsula. However, with out proactive planning, monitoring and management, it can also bring undesirable impacts for the region. Impacts occur as visitors arrive at and begin to interact with our region. Left un-checked, as tourism grows in the region, so will the negative impacts to the environment, social well-being, cultures and the quality of the visitor experience offered. In fact, according to some stakeholders, the Northern Bruce Peninsula is already beginning to experience the undesirable affects of tourism. Though these impacts have not been objectively substantiated, they have been commonly reported and are perceived to be occurring throughout the region.

IMPACT...

to have an effect of influence on.

Impacts can be positive or negative.

Undesirable impacts occur through predictable patterns that, if understood, can be used to structure management systems and actions. With proactive planning and effective visitor management, the undesirable impacts can be avoided or mitigated and managed.

Application of the visitor management framework will involve many different destination leaders and organizations. Destination leaders will need to be cognizant of their level of management and/or control of assets under their care. Conversely, for factors and assets not under their direct management and/or control, destination leaders will need to consider their level of influence and contribution towards influencing and imparting desirable visitor behaviours.

Northern Bruce Peninsula – Visitor Management, cont'd

A newer approach, focusing on management of impact instead of visitor numbers, based on the **Limits of Acceptable Change (LAC)** process is proposed. Limits of Acceptable Change provides planners and land managers with a way of thinking about acceptable levels of impact and how to manage them.

Significant changes in the nature of tourism and broad recognition of its relationship with natural environments suggest that new paradigms to manage tourism development are required. In the future, tourism development will be more sensitive to its environmental impact, and will emphasise nature-based experiences. This focus means that a framework to manage tourism development is needed. While the carrying capacity model has been suggested, it has significant conceptual and practical weaknesses that cannot be overcome. The combination of limits of acceptable change measures applied against a visitor management framework provides a more tangible approach to realizing desirable sustainable tourism management outcomes. The following visitor management framework is proposed.

The first step is identify desired outcomes in alignment with the vision of the sustainable tourism management plan developed by the key stakeholder partners. Implementation of management actions is the final step in the visitor management process.

Land managers and planners will need to be cognizant of their **level of management and/or control of assets** under their care. Conversely, for factors and assets not under their direct management and/or control, managers and planners will need to consider their **level of influence** and contribution towards influencing and imparting desirable visitor behaviours.

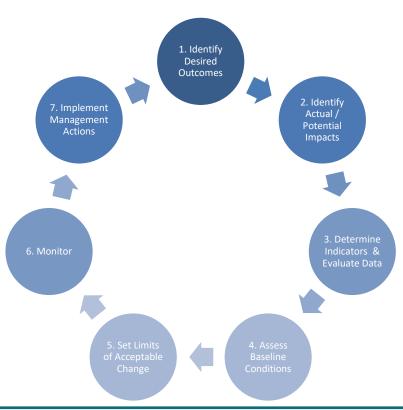
VISITOR MANAGEMENT FRAMEWORK

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

Developing a Visitor Management Framework for the Northern Bruce Peninsula

Visitor management is about more than setting a "total" number of people that can travel to the region (carrying capacity). It is about truly understanding how the visitor impacts occur, understanding the impacts, setting limits of acceptable change and responding to changes in conditions with effective visitor management strategies that appropriately target supply, demand, the resource and the visitor. To avoid, mitigate and manage the undesirable impacts of tourism, the region will establish a clear visitor management framework that considers environmental, social, cultural and visitor experience outcomes.

The below phases are discussed in the following slides.



1. Identified Desired Outcomes

The below desired outcomes were identified throughout the stakeholder engagement and will help form the visitor management recommendations for the strategy.

Desired Outcomes:

- Conservation and protection of natural, social, cultural, and economic assets
- Better visitor experience
 - · More offerings and services
 - More 'learning' experiences guided tours etc.
 - Better management
 - Quality (culture) vs quantity (\$\$)
- Unification and common goals between all Tobermory, Lions Head and SON
 - Currently they're all working independently
- Better collaboration between tourism suppliers i.e., cross promotion / packaging
- Attract a better visitor:
 - Learners, explorers
 - · Fair balance between the above and New Canadians
- Enhanced education for tourism businesses
 - Via webinars, videos, online tutorials
- Enhanced transportation could be a shuttle system, golf cart system

etc.

5+ Years:

- Increased Infrastructure:
 - Development of assets (e.g., Miller Lake, Dyers Bay)
- Attract young residents and entrepreneurs

2. Identified Actual / Potential Impacts

The below impacts were identified throughout the stakeholder engagement and will help form the visitor management recommendations for strategy development and implementation.

SOCIAL / CULTURAL

- Perception to a number of key stakeholders and residents that the social impacts of over-tourism are "All consuming"
- Tourism is impacting local lifestyle residents are being displaced by visitors during peak season
- Dichotomy between stakeholders who don't want change and those desiring economic development and employment creation
- Negative visitor behaviour i.e., illegal camping, noise, aggression etc.
- Concerns of over-tourism impacts on Indigenous community, primarily in the Cape Croker area

POLITICAL

- Funding challenges need committed, sustainable funding for infrastructure & tourism initiatives which mitigate negative impacts and promote sustainable tourism
- Negative perceptions some residents think raise in taxes is because of increased visitors
- Challenges with tourism governance, management and support a lack of leadership, ownership, communications, and cohesive strategy

ENVIRONMENTAL

- Development causes habitat fragmentation
- Overcrowding/lack of infrastructure causes informal trails, bathrooms etc.
- Mortality of plants/animals (especially species at risk)
- Septic issues
- Water quality
- Garbage disposal

VISITOR EXPERIENCE

- Unmet expectations and negative experiences due to:
 - turning people away due to capacity
 - not being able to offer basic services (washrooms, restaurants)
 - Overcrowding
 - Seasonality
- Lack of focus and development across the region on sustainable tourism development

3a. Determine Indicators

Determine Indicators: To identify where the impacts are perceived to be occurring.

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

Impacts are not necessarily distributed uniformly across the destination. Some areas will experience different impacts than others while some impacts may be consistent across the study area. As such, it is important that the general location of the impacts be identified as the visitor management framework will work to respond to impacts with different management strategies and monitor impacts based on the location.

Destination leaders will work collaboratively with the regional tourism industry to identify SMART (specific, measurable, achievable, realistic, time-bound) indicators related to undesirable visitor impacts.

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

The destination can be divided into 4 core geographies based on the characteristics of the region.

Bruce Peninsula National Park / Terrestrial Natural Areas

Fathom Five National Marine Park / Aquatic Natural Areas

Rural

Urban

Example Indicators

Note: The following are only a **very small sample of indicators** shown to provide context. A more comprehensive list of sample indicators will be provided in the final draft report.

Impact	Indicator
Environmental	Total human footprint in the region associated with tourism
Habitat fragmentation	Tons of domestic solid waste produced by tourism sector
Human / wildlife conflicts	Percentage of waste recycled / diverted from landfill
Waste production	Percent of tourism operators implementing programs to minimize solid waste production and divert solid waste from landfill
Water consumption	Solid waste from landing
Water quality	Amount of water consumed per visitor
	Percent of tourism operators implementing programs to reduce water consumption
Energy consumption & efficiency	
Social / Cultural	Relative speed reduction on local roads / highways during peak season
• Conflict	Percent of visitors arriving to the region via a personal vehicle versus alternative transportation
• Crowding	Number of motor vehicle incidents involving tourists
Crime	Percent of residents who are supportive of tourism
Quality of life & lifestyle	
Respect Indigenous Cultures	
Visitor Experience	Percent of visitors satisfied or very satisfied with their experience in the region
	Percent of visitors indicating their experience matched or exceed their expectations
	Percent of visitors satisfied with the quality of tourism attractions in the region
	Percent of visitors satisfied with the tourism activities available in the region
	Percent of visitors satisfied with the accommodations in the region

3b. Evaluate Data

Data Availability: To identify what data exists currently that may be able to be used to establish indicators and monitor each impact.

Reliable datasets to inform monitoring of each indicator will be determined and or developed.

It is important to understand the importance of monitoring and the use of objective data to track the change in impacts. As such, it is necessary to evaluate early on what data is / is not available and who owns / manage data and its frequency of collection.

Identify the indicators for each impact from the regional categories. After impacts are grouped / categorized, identify:

- Does data exist that could provided insights about the nature and scale of this impact?
 - If so,
 - O Who is the data owner?
 - O How often is the data collected?
 - o Is the data accessible?

4-6. Assess Baseline Conditions, Set Limits of Acceptable Change, Monitor

Assess Baseline Conditions:

For each indicator, the current baseline condition will be determined by evaluating the respective datasets.

Set Limits of Acceptable Change:

Through collaborative and participatory engagements with industry stakeholders, thresholds and triggers will be set for each indicator to establish the limits of acceptable change. In addition, triggers will be identified for each indicator to suggest when management actions should be applied to stop undesirable trends in each indicator.

Monitor:

Destination leaders will develop and implement regular monitoring protocols and accountabilities for each indicator and prepare regular status of destination reports to present the results to regional stakeholders and residents.

Example Visitor Management Strategies

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

Management strategies are generally categorized based on the directness in which they act on visitor behavior. In general, management strategies include a) direct strategies and b) indirect strategies.

Direct strategies directly target the visitor and limit their freedom of choice (regulation, enforcement).

Indirect strategies attempt to target the decision factors on which visitors base their behaviours (e.g., educational programs, infrastructure).

Impacts are not necessarily distributed uniformly across the Northern Bruce Peninsula destination. Some areas will experience different impacts than others while some impacts may be consistent across the study area. As such, it is important that the general location of the impacts be identified as the visitor management framework will work to respond to impacts with different management strategies and monitor impacts based on the location.

Visitor Management Strategies need to align with identified indicators across the 4 core geographies in the region.

Bruce Peninsula National Park / Terrestrial Natural Areas Fathom Five National Marine Park / Aquatic Natural Areas Rural

Urban

Example Visitor Management Strategies, cont'd

The following table illustrate examples of direct and indirect management strategies that could be applied to address a few of the growing impacts that were identified in the Northern Bruce Peninsula region. A number of these strategies could be applied in a pilot project address impacts in the **Tobermory Village** core during the peak tourism season.

Impact	Impact Pathway(s)	Direct Management Strategy	Indirect Management Strategies
Growing impacts to quality of visitor experience and quality of life for local residents.	Development of new visitor infrastructure (e.g., accommodations, walking pathways, attractions).	Pass bylaws to prohibit the development of non-compatible visitor infrastructure in or adjacent to residential zones.	Prepare / adopt a visitor education program (e.g., Leave No Trace) to educate visitors about residential zones, their impacts on them and strategies to minimize impacts.
			Developed sensitively sited and appropriate infrastructure that attracts visitors away from residential zones.
Increased solid waste production.	Visitors consume goods and services in the region producing more solid waste.	Adopt bylaws prohibiting certain solid wastes (e.g., single use plastics).	Develop and apply education and incentive programs to help tourism industry and operators reduce solid waste production.
Increasing conflicts due to nuisance behaviours by visitors (e.g., improper use, noise, aggression).	Visitors to the region party to excess becoming intoxicated and disrespectful and belligerent	Increase enforcement presence in problem areas during known problem periods.	Prepare and market a visitor code of conduct to be followed when visiting the region.
Increasing crowding, congestion and competition for local services such as parking downtowns.	Visitors travel to the region by vehicle and consume parking stalls.	Alter parking bylaws to discourage lengthy parking and increase enforcement of parking bylaws.	Provide parking areas outside of the core areas in the region and promote visitors to park there. Provide alternative transportation choices (e.g., pathway, transit) to move visitors from parking areas to attractions / community cores.
Peak time crowding at attractions is leading to lowered visitor experience.	Popularity of park trails and attractions has grown to the point that encounters with other visitors are too frequent and infrastructure can not support the visitor demands.	Implement zoning based on the Recreation Opportunity Spectrum and set maximum daily peak time visitation numbers for each zone. Enforce maximums.	Develop infrastructure to accommodate additional visitation. Upgrade / harden sites where impacts are occurring.

7. Implement Management Actions

As necessary based on the performance of each indicator, the industry will apply comprehensive direct and indirect visitor management strategies to ensure thresholds relating to ecological, social, cultural and visitor experience indicators remain within the limits of acceptable change. Destination managers will deliberately apply direct and indirect strategies that:

- Manage the Supply
- · Manage the Demand
- Manage the Resource
- Manage the Visitor



Visitor Management Strategies

- Consider effectiveness & influence tactic on visitor (direct vs indirect)
- Each tactic should be based on cause of behaviour creating the impact
- Best approach is a comprehensive, integrated visitor management strategy



Sustainable Tourism Management Plan – Key Pillars

The following are the draft list of strategic pillars and associated tactics which will form the basis of the sustainable tourism management plan. The pillars are designed to focus the development and management of tourism in NBP from 2018 to 2020. Once agreed with the Steering Committee, Twenty31 will outline full detail with each pillar and each tactic including overall objective, timing, resourcing and performance measurement criteria.

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

Strategy 1: Leadership, Governance and Resourcing This pillar is designed to provide the basic leadership and governance 'infrastructure' for the systematic management of tourism within NBP. While rather 'simplistic' – these are the core tactics that will ensure a solid leadership, management and governance base and ensure effective tourism development in NBP. Timing: Q1 to Q2 2018 (Tactics 1 to 3); 2018 to 2020 (Tactic 4)	Strategy 2: Community and Industry Engagement This pillar is designed to effectively communicate the direction, management and performance measurement of the tourism plan with all key stakeholders in NBP. Timing: Q 1 to Q4 2018 (launch of Tactics 1 to 4); 2019-2020 (on-going management of Tactics 1 to 4)
1. Set up and formulation of the Tourism Advisory Group (TAG).	1. Roll out and communication of the plan to both the residents and travel industry stakeholders; with a once yearly town hall style update and engagement meeting.
2. Empowerment of the TAG under a charter with lines of communications and engagement with the Municipality (NBP), Bruce Peninsula Environmental Groups (BPEG), Regional Tourism Organization 7 (RTO7), Bruce County Tourism Industry Operators, Saugeen Ojibway First Nation (SON), Chamber of Commerce, Bruce Peninsula Biosphere Association, Ontario Ministry of Tourism Culture and Sport, and Parks Canada.	2. Set up of an online communications portal (likely Facebook to start and eventually a dedicated industry website). The portal will also be set up to capture and manage stakeholder content (i.e., CRM), basic data and possibly a research dashboard.
3. Development of a job description and retaining a dedicated Tourism Development Manager at the Municipality.	3. Initiate an annual report back to the community, municipality and tourism industry stakeholders.
4. Active management of the Tourism Plan and providing strategic direction to the Tourism Development Manager via quarterly meetings and an annual performance review.	4. Conduct quarterly meetings with Tobermory and Lions Head municipalities and the SON (and possibly South Bruce) to review tourism management issues, develop collaborative tourism initiatives, and forward plans.

Sustainable Tourism Management Plan – Key Pillars, cont'd

Strategy 3: Product and Experience Development This pillar is designed to develop and refine NBP's product and experiences offerings including in shoulder seasons and new areas as well as build capacity with local operators to deliver tourism experiences. Timing: Q1 to Q4 2018 (Tactics 1 to 4 set up); 2019-2020 (on-going management of Tactics 1 to 4)	Strategy 4: Investment and Asset Development This pillar is designed to secure stable funding for the plan initiatives as well as manage existing tourism infrastructure and develop new tourism assets. Timing: Q1 and Q2 2018 (Tactic 1); Q2 to Q4 2018+ (Tactics 2, 3 and 4)
1. Complete and maintain the asset inventory database and qualify all NBP operators according to their market, trade and sustainability readiness.	1. Formalization of the revenue share plan with the Municipality (Parking Fee) and Chamber of Commerce (Visitor Amenity Fee) — with the funds allocated for tourism development and management (i.e., this plan) to be co-directed by the Tourism Advisory Group.
2. Based on a suggested itinerary example framework, identify, develop and promote key sustainable tourism itineraries aligned to adventure tourism (hiking, cycling, paddling and trekking), incorporating other product activities including touring, culinary, cultural, dark skies and Indigenous tourism); also include a number of itineraries in shoulder seasons.	2. Solicit other restricted funds (i.e., for dedicated projects and/or admin/staffing) from identified sources (e.g., MTCS, OMAFRA,Parks Canada, NGOs/Foundations); solicit non-restricted funds (i.e., for all initiatives) from tourism industry partners (i.e., via a proposed co-operative marketing/communications programme and possible other programme).
3. Delivery of product development and training workshops to local tourism operators to build capacity (i.e., workforce training, marketing training, service delivery, etc.) around the itineraries and the shoulder seasons opportunity and move a defined number of operators each year along the market, trade and sustainability readiness ranking.	3. Develop and manage an infrastructure plan including for hard assets (bathrooms, workforce accommodations, parking, roads, signage, etc.) linked to tourism delivery – in partnership with the Municipality.
4. Identification and roll out of a regional tourism signage and digital mapping plan.	4. Develop a brief and retain the services of a planner to outline development plans for 1 to 3 new tourism assets (i.e., including the SON Interpretive Centre); once developed; identify and pitch prospective investors/developers.

Sustainable Tourism Management Plan – Key Pillars, cont'd

Strategy 5: Sustainability Positioning and Destination Branding This pillar is focused on the promotion, marketing and communication (to consumers and the travel trade) of NBP's tourism brand experience. Timing: 2018 to 2020 (Tactics 1 to 4)	
1. Development and management of a travel trade plan to transition NBP to higher-value and more experiential tour operators – lined to the new itineraries.	
2. Development and management of an annual consumer marketing programme designed around a digital-first content marketing framework.	
3. Development and management of an annual supporting communications and PR plan.	
4. Roll out of the BIG IDEA NBP Sustainable Tourism Pledge. Note – Twenty31 is currently refining this idea involving the integration of travel consumers within the overall sustainability positioning of a destination. Our intention is to outline a plan whereby NBP would openly communicate its sustainable tourism mandate and encourage travel consumers to travel to and experience the destination upholding a basic set of sustainable travel principles (i.e., aligned with the ultimate sustainable tourism definition NBP adopts). In this case the responsibility for sustainable tourism within NBP is jointly shared between the tourism industry and travel consumers.	