



**TOURISM STRATEGY
& ACTION PLAN
2021-2026**



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Consulting team



Bannikin Travel & Tourism Ltd.

Terrilyn Kunopaski, Project Lead

Britney Hope

Jillian Dickens

Zach Vanasse

Project team, The County of Dufferin



Karisa Downey, Economic Development Officer

Darrell Keenie, Director of Planning, Economic Development & Culture

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Glossary of Terms & Acronyms

Agritourism:

Defined by Charline Dubois, *The tourist on the farm: A 'muddled' image*, as a series of marketed products and activities through which a visitor has the opportunity to learn about features of both agriculture and rurality

BIPOC:

Black, Indigenous, People of Colour

Brand:

The visual and storytelling image presented by an organization or product to demonstrate its appeal and value

Collaboration:

The act of combining efforts between public and/or private businesses & organizations when working towards a common goal, or when common interests could be more effectively met by working together (whether through time & financial resource allocation, marketing efforts, etc.)

Community engagement:

The process of involving residents, local business owners and others directly in information gathering and decision making

Demand generator:

Any event, attraction, accommodation, activity, festival or other initiative that may be the primary motivator for visitors to make their way to a destination

Destination:

A place that people visit with intent, for (a) specific reason(s) or purpose

Inclusion:

The act of including people of all cultural backgrounds, gender identities, sexual orientations, physical capabilities, ages and income groups in each stage of tourism development, from community engagement, to committees, to marketing & promotions

Itinerary:

A planned route or journey, outlining a clear sequence of activities and suggested schedule

Packages:

Where and when multiple service providers act in concert to provide a pre-set "product/experience." For example: Stay and Dine package, Event and Stay package, Activity and Meal package, etc.

Socially conscious traveller:

Those travellers who prioritize ethical, inclusive, sustainable sources of tourism entertainment

Sustainable tourism development:

An approach to tourism growth & promotion that prioritizes: long-term benefits for residents, business owners and visitors; community spirit; respect for all people & the natural environment; and dollars spent versus simply heads in beds

Tourism:

Leveraging attractions, natural assets, arts, culture, culinary appeal or other factors to attract visitor spending in any given area

Tourism asset / tourism product / tourism service:

Any event, attraction, experience, service or otherwise that supports the delivery of tourism

VFR:

Visiting friends & relatives

Visitor economy:

Defined by the World Travel & Tourism Council as any direct, indirect and induced economic activity resulting from visitors interactions with their destination

2sLGBTQIA+:

Two Spirit, Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual

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PART 1

PROJECT OVERVIEW

1.1 Executive Summary

In June 2020, the County of Dufferin (“the County,” “Dufferin County,” “Dufferin”) set out to develop its first-ever five-year Tourism Strategy & Action Plan, presented within this document. The investment was an initial step to uncovering the tourism potential in the region as a singular entity since the 2020 dissolution of Headwaters Tourism Association, an organization previously tasked, in part, with developing Dufferin’s visitor economy.

The findings, insights, analyses and recommendations presented throughout the Strategy & Action Plan are the result of comprehensive research, community engagement, stakeholder outreach and collaboration with Dufferin team members. It has been developed to clearly outline a roadmap for building the region’s capacity and brand as a tourism destination, which is particularly exciting given this is a new venture with great potential for growth.

The recommendations and Action Plan have been categorized within six pillars:

1. Structure & Process
2. Community Involvement
3. Product Development
4. Infrastructure Development
5. Regional & Environmental Considerations
6. Brand & Marketing

Actions have been strategically crafted to ensure the region first invests in establishing a solid foundation for tourism growth through brand development, product enhancements, and market readiness training. Once these core elements are in place to ensure positive delivery of tourism services, focus can more wholly shift to marketing initiatives and other promotional efforts. General timelines have been assigned to each Action for the sake of effective implementation. The Strategy has also been developed with sustainable, attainable planning top of mind, to ensure the impacts of tourism on the County are positive.

Collaboration, community engagement, diversity & inclusion, and creativity are all recurring themes throughout.

There is no end to effective tourism development; while it may evolve with changing demand, expectations & potential, it is an ongoing effort that impacts communities now, in the coming years, and generations in the future. Adoption of this Strategy and a dedication of appropriate resources to effectively see it through will lead to long-term diversification of Dufferin's economic development initiatives, benefiting the County, its municipalities, and its communities at large.

The five-year vision that this plan aims to achieve is:

By 2026, Dufferin County will be established as an emerging destination not far from Toronto that connects people to the land, through nature and agriculture; to each other, through arts, culture, history & heritage; and to themselves, through scenic, off-grid experiences.

1.2

Methodology

In developing this Tourism Strategy & Action Plan, key actions that have taken place include:

Background research:

- 2019 applications from municipalities for Economic Development Fund
- Review of Dufferin County Economic Development website & joinindufferin.com
- Dufferin County tourism asset summary
- Dufferin County Economic Development Strategic Plan (2017)
- Dufferin County Wayfinding Plan (2018)
- Dufferin County Signage Concepts (2019)
- Dufferin County Business Retention & Expansion Report (2020)
- Dufferin County WOWC Survey (2020)
- BR+E Company & Tourism Survey Report (2020)
- inDufferin Brand Guide

Stakeholder engagement:

- 26 one-on-one interviews with local tourism & tourism-adjacent stakeholders;
- 15 one-on-one interviews with County representatives, including staff and council members;
- a public information session, which engaged approximately 20 participants;
- 1 municipalities workshop (8 participants);
- 1 stakeholder workshop (4 participants);
- A stakeholder survey (15 responses).

Plus:

- A comparable analysis (see Appendix A)
- An asset inventory
- Two site visits

The purposes of these combined activities were to understand: the existing narrative about tourism in the region and how it varies from municipality to municipality; the perceived opportunities for tourism development; and gaps in product & infrastructure that require attention in order to successfully pursue tourism development. This insight & analysis is vital to informing a sustainable, effective, accessible and inclusive tourism plan for Dufferin.

The circumstances and considerations of Covid-19 were integrated throughout the research, engagement & strategy creation process.



PART 2

REGIONAL

ANALYSIS &

TOURISM

DEVELOPMENT

- 2.1. Market Overview
- 2.2. Dufferin County Tourism Snapshot
- 2.3. Regional Tourism Organizations
- 2.4. Tourism & Community Success
- 2.5. Elements of Successful Tourism Development



2.1 Market Overview

Since March 2020, Covid-19 has disrupted the visitor economy on a grand scale: Local businesses are left with fewer resources—both time and money—to invest in engaging with the community and regional visitors. Residents and prospective visitors are facing uncertain economic futures, not to mention, health & safety concerns, both of which are consequently limiting many people’s interactions with tourism assets within their home communities and beyond. The coronavirus has also disrupted marketing and communications channels, and tourism brands must consider how to engage with the public ethically and in the best interest of local businesses & residents, which are often two competing mandates.

The tourism sector has been among Canada’s most devastated as a result of Covid-19. Nationally, tourism revenues are expected to drop by 61 per cent in 2020, [according to Destination Canada](#), with returns to 2019 levels not expected until 2024.

In Ontario, tourism previously represented a \$36 billion industry, according to [Invest Ontario](#). As of 2016, the sector represented Ontario’s 12th largest employer, with a workforce of over 390,000 people—more than 60 per cent of those in full-time positions. Results from [an industry survey](#) recently conducted by the Tourism Industry Association of Ontario (TIAO) indicates the average revenue decline amongst provincial tourism businesses due to Covid-19 is 69 per cent.

But, despite the challenges thrust upon destinations across the globe, one trend is expected to take-off over the coming months, and indeed, potentially years, even as a coronavirus vaccine becomes widely available. As seen throughout summer and fall 2020, people are seeking new experiences that are close to home because of the reduced health risks and financial burdens associated with local and regional travel, compared to further-afield domestic trips or international vacations.

A [poll by Vancouver-based firm Research Co in August 2020](#) found that most Canadians aren't interested in getting on a plane to anywhere, at least until a vaccine is developed. Results of [an Ipsos study](#) from May reinforce this notion, indicating that four in 10 Canadians surveyed are more open to domestic travel this year.

Looking ahead to the easing of travel restrictions, [a study released in June 2020 by Oliver Wyman](#) suggests that, for Canadians, there is a greater propensity for domestic urban and rural experiences, or to not travel at all, compared to those interested in international travel.

This data reinforces the opportunities ahead for Dufferin County, which is at a particular advantage for a number of reasons, including but not limited to:

- its proximity to markets such as the Greater Toronto Area (GTA), the Golden Horseshoe, Barrie-Collingwood, and more;
- its bounty of natural attractions, and options for outdoor activities;
- and its artistic & cultural appeal.

With dedicated resources and leadership, these characteristics could be leveraged for tourism development in a pre- or post-pandemic era. However, given current trends, there is an added advantage to Dufferin County's location and base tourism product.

As the sector is a new priority for Dufferin, the current state of tourism demand presents the ideal conditions in which to establish foundational elements for sector success (a tourism brand, marketing resources, tourism product enhancements). With that, as rebounds begin, it will be ideally positioned to offer well-rounded visitor experiences.

“ *There’s a great opportunity to develop the assets we have — the nature, the culture, the agriculture — and package these assets together to attract & entertain visitors.* ”

- Stakeholder interview

Further, there is an evolving consciousness surrounding diversity and inclusion, shifting consumer priorities to businesses that hold these values paramount to operations. This trend is expected to guide travel spending and destination selection among Dufferin County’s target markets—from the GTA in particular—with an opportunity for destinations to appeal to the **socially conscious traveller**.

SOCIALLY CONSCIOUS TRAVELLER

Those travellers who prioritize ethical, sustainable sources of entertainment, though interests may include anything from arts, culture and cuisine to sports and outdoor activities. They will actively seek-out and give priority to Black- and Indigenous-owned businesses, as well as those owned by People of Colour. They understand the power their purchasing decisions can have on influencing brands—and they’re not afraid to wield it by avoiding choices that may contradict their values in favour of those which validate them. Savvy brands and destinations who gain the trust of the socially conscious traveller can expect long-term and devout loyalty, a high rate of referrals and generous user-generated social media content.

This will be an important consideration for Dufferin’s tourism development, from stakeholder engagement to marketing, and everything in between. Though accessibility and inclusion of Black, Indigenous, People of Colour (BIPOC), 2sLGBTQIA+, differently-abled folks, youths and other groups should always be top of mind in tourism development, it has become particularly notable now in order to effectively meet this moment.



Indeed, the Tourism Industry Association of Canada [reports](#) that the global purchasing power of 2SLGBTQ+ travellers amounted to more than \$917 billion in 2016. Canada's place within this narrative is advantageous, given its shared number one ranking (with Sweden & Portugal) as the most gay-friendly destination in the world, according to the [Spartacus Gay Travel Index 2019](#). As for Black travellers and those from other racialized groups: There is no Canada-specific data to indicate the market potential however, in the U.S., [Mandala Research found](#) "the economic value of African-American travellers has increased to \$63 billion" in 2019. One can deduce from these findings that not only are the social and moral benefits of inclusive tourism development important, there is strategic value to such an approach.

Notably, this mindset aligns with the Canadian government's 2019 report, [Creating Middle Class](#)

[Jobs: A Federal Tourism Growth Strategy](#), which identifies rural and remote tourism, inclusive tourism and farm-to-table tourism among the key product lines for investment.

As Dufferin looks to tourism as a key economic driver for recovery in navigating the challenges of Covid-19 and ahead to a post-pandemic world, the value of the sector remains the same: Tourism benefits communities through stimulating pride of place, creating jobs and generating business for local retailers and restaurateurs.

Slow, thoughtful development that places value on quality arrivals over quantity, carefully targets audiences with specific tourism ideals and prioritizes the well-being of the natural environment & communities define the path forward.

2.2 Dufferin County Tourism Snapshot

Tourism development is a new priority for Dufferin County, with prior investments in the sector primarily laying in the hands of the former Headwaters Tourism Association and individual municipalities. Now identified as a potential area of growth by the County's Economic Development function, Dufferin is in an ideal position to design tourism within the region to its liking. Given the opportunities for the visitor economy, a proactive approach to tourism design and development will allow Dufferin to monitor and manage growth, as not to disrupt its assets or residents, and ensure sustainable returns.

Located just over an hour from Toronto and in close proximity to other source markets (within the Golden Horseshoe, Collingwood, Barrie, etc), and boasting an array of unique experiences that have yet to be discovered by these markets, Dufferin has the opportunity to position itself as the backyard playground many Ontarians are seeking, using a sustainable approach.

In building this tourism strategy from the ground up, it is necessary to acknowledge Dufferin's existing wealth of assets. Its natural beauty and the outdoor recreation activities that are available as a result is no doubt its foremost asset; Dufferin County Forest, Mono Cliffs Provincial Park, Island Lake Conservation Area and Luther Marsh are only some of the assets whereby visitors can enjoy hiking, cycling, paddling, fishing, picnics and other outdoor activities. Additionally, the agricultural sector is poised to benefit from tourism development. Thirdly, there is a well-respected creative community. In fact, arts and culture is an important tourism draw—especially visual and performing arts—referring specifically to assets such as The Museum of Dufferin and Theatre Orangeville.

“ *Tourism success in Dufferin would mean we are not overcrowded, but there are visitors coming to our restaurants & retailers, and appreciating our outdoor activities, then going home to tell their friends & families about what a good time they had.* ”

- Stakeholder interview

A primary consideration in the process is tourism readiness, which determines the quality of a visitor's experience and their likelihood of returning or recommending a destination to their friends, family and social network. Tourism readiness in Dufferin County varies from region to region and business to business.

Another important consideration is tourism management. Other regions, such as Prince Edward County, which have not had strategic plans in place prior to a tourism boom, have been faced with overwhelm of arrivals. Businesses struggle to keep up with demand, residents are unamused by the imposition and the preservation of natural resources is at risk. The task of reversing course and implementing sustainable growth models becomes far more challenging when done reactively.

For Dufferin, the overcrowding at Mono Cliffs and long line-ups of cars on nearby roads is a preview of the broader challenges that emerge without proper planning or oversight in place. Factoring

in other signs of interest in the region, such as regularly full parking lots at Hockley Valley Resort and Adamo Estate Winery, indications point to the timely need for a focused tourism plan in order to manage visitor growth and product development strategically. This window of opportunity to be proactive in defining what the sector looks like for Dufferin might be closing, if the current demand is any indication.

Finally, given the multiple layers involved to regional development, particularly as it relates to work with multiple municipalities with varying tourism assets, tourism development in Dufferin must be carefully measured. There is an opportunity to leverage existing tourism-ready product for swift returns, however, a focus on strengthening the sector's core tourism positioning through defining a well-rounded tourism brand identity and establishing attractive experiences prior to actively promoting the destination will allow for greater returns in the long-term.

2.3 Regional Tourism Organizations & Partners

THE TOWN OF ORANGEVILLE

As Dufferin County rolls out its first-ever five-year Tourism Strategy & Action Plan 2021-2026, the Town of Orangeville is simultaneously introducing its latest tourism plan. Orangeville is currently the only municipality within Dufferin to have its own tourism strategy, leveraging assets such as Theatre Orangeville, public art, and annual festivals & events. Orangeville is often referred to as “the gateway to Dufferin County” so collaboration with the Town and supporting its Strategy implementation should be top of mind. Committed and continued communication will ensure that the two parties align human and financial resources whenever possible in pursuing opportunities with mutual benefit, and to avoid doubling-up of efforts.

CENTRAL COUNTIES / REGIONAL TOURISM ORGANIZATION 6 (RTO6)

RTO6, also known as Central Counties Tourism, works with tourism offices within the regions of York, Durham and Headwaters. While each region is responsible for its own product development and marketing, the RTO’s mission is “to increase tourism in the region by promoting and developing unique and competitive tourism products that attract high yield visitors from outside the Central Counties region.” It will prove an essential resource, particularly as it relates to research and data collection, marketing support, product development and industry relations. As such, open lines of communication with Central Counties will benefit Dufferin’s overall tourism growth.

TOURISM INDUSTRY ASSOCIATION OF ONTARIO

The Tourism Industry Association of Ontario (TIAO) is a membership-based organization, focused on government relations on behalf of the province's tourism industry. Tour operators, destination marketing organizations, regional tourism organizations, and others are part of the association, altogether representing 188,000 businesses and nearly 400,000 employees. Its evidence-based approach to policy recommendations influences political decisions on a provincial level that address the needs of the industry. Its stated mission is, "To be the unified voice of the diverse tourism industry in Ontario in order to realize prosperity and growth," with a vision for "economic prosperity for Ontario through tourism." TIAO will be a valuable resource to Dufferin in understanding market trends and changes, as well as funding opportunities and policy changes that may impact Dufferin or stakeholders at large.

INDIGENOUS TOURISM ONTARIO

Indigenous Tourism Ontario (ITO) defines itself as "the province's first and only dedicated Indigenous tourism organization that focuses on uniting communities, Indigenous organizations and industry leaders to support the growth of Indigenous tourism in Ontario." Members gain access to marketing, sales and business development programs that in turn support Indigenous communities & entrepreneurs. Indigenous cultural expression and preservation through tourism are integral to its work. In carrying out this Strategy's recommendations and actions, collaboration with and direction from ITO will help to enhance Dufferin's appeal to those seeking Indigenous art, storytelling and history through tourism experiences.

“ “ *We’re all proud of whatever part of the County we come from but if one area is flourishing, we all benefit.* ” ”

- Stakeholder interview

TOURISM INDUSTRY ASSOCIATION OF CANADA

The Tourism Industry Association of Canada (TIAC) is a national private-sector advocate, whose mission is to “be the voice of Canada’s tourism industry and improve its global competitiveness as an international destination through leadership and advocacy.” There are 600 members from across Canada, including large, small and medium-size enterprises. As Dufferin’s tourism sector grows, the value of TIAC will evolve as well. Dufferin may benefit from its research, data and investment opportunities.

CONSERVATION AUTHORITIES & ONTARIO PARKS

There are five conservation authorities that have jurisdiction over land in Dufferin County (Dufferin Rural Water Quality Program, Grand River, Nottawasaga Valley, Credit Valley, Toronto and Region, Saugeen Valley), and three Ontario parks & nature reserves (Boyne Valley, Hockley Valley, Mono Cliffs). Collaboration between the County and conservation authorities, as well as Ontario Parks, will be important to the continued protection and sustainable development of these natural spaces, and surrounding infrastructure, as tourism develops.

2.4 Tourism & Community Success

According to a 2017 report by the [Rural Ontario Institute](#), "Tourism development is now widely viewed as one of the most promising and effective tools for rural development across Ontario." In changing economies or in the interest of economic diversification, the sector can be a lucrative one, particularly for regions with natural and cultural assets that have not been utilized as economic drivers in the past. "By looking inward and identifying local strengths and amenities, place-based development enables communities to mobilize these assets and turn them into community and economic development opportunities," the Institute says.

Given Dufferin is venturing into tourism development on the ground level, one must

understand exactly what these opportunities are. Community benefits of tourism include:

- New and improved public facilities
- New employment opportunities
- Stimulated entrepreneurial spirit
- Enhanced cultural assets, activities & events for local enjoyment
- Deepened understanding of, appreciation for and interaction with regional assets
- Heightened pride of place
- Strengthened commitments to environmental preservation & conservation

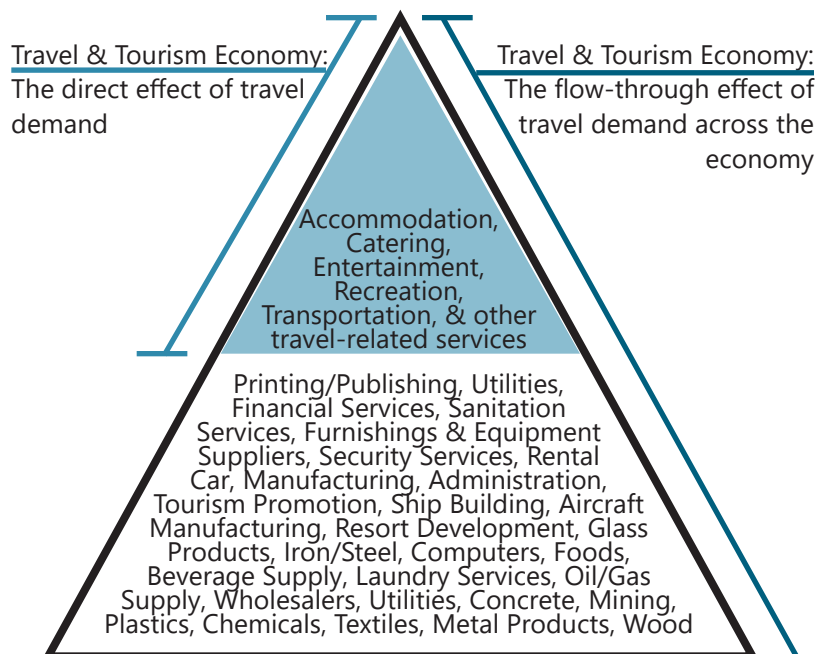
In sum, investments in tourism equal investments in a community's social and economic well-being.

THE MULTIPLIER EFFECT

The following diagram illustrates the powerful influence tourism can have on an entire economy. As tourism dollars flow through a community, businesses that are not usually thought of as tourism businesses (e.g., gas stations, laundromats, sign makers) benefit as well. This is known as the multiplier effect.

The jobs generated directly within the travel and tourism industry are considered primary jobs, whereas the jobs generated in the larger economy as a result of travel and tourism are considered secondary jobs. The multiplier effect means that part of each dollar spent by a visitor can end up in the pocket of a local fisherman, farmer, or hardware store employee.

FIGURE 1: Sourced from [Transforming Communities Through Tourism: A Handbook for Community Tourism Champions](#)



2.5

Elements of Successful Tourism Development

To reap the benefits of investments in tourism & the overall visitor economy, ongoing strategies must be embedded within a region's approach to sector development. These include:

Community involvement

Integrating community participation is critical to ensuring the regional benefits of tourism development far outweigh the setbacks. Community buy-in impacts the visitor experience, from the service they receive at local retailers and attractions, to the general spirit of a destination. As such, not only is it pivotal to give the community a platform to speak their minds as it relates to tourism initiatives, leaders must go one step further in ensuring these considerations are taken seriously in planning and development. Admittedly, there will never be a one-size-fits-all approach, though the purposeful inclusion of various perspectives holds value in and of itself. Community engagement can be done through tourism advisory committees, surveys, polls, social media engagement and local activities (meetings, meals, coffee breaks, etc).

Stakeholder engagement

Tourism stakeholders often become the face of a destination; it is interactions with these individuals that will define a visitor's experience, and it is they who come to truly understand the visitor profile. Tapping into this on-the-ground perspective and opening the floor to their expertise & observations allows for a more holistic approach to tourism planning. Plus, encouraging their involvement traditionally leads to more active buy-in to tourism initiatives, further enhancing a destination's success. Stakeholder engagement can be achieved through committees, regularly scheduled meetings, ongoing communication (i.e., newsletters, social media) and an active presence of tourism leadership representatives within the community.



Integrated planning & collaboration

Tourism development cannot happen in a vacuum; not only does it depend on the active and sincere involvement of the community and stakeholders, it must also be a priority amongst all levels of municipal staff & government. The skills and resources of various municipal functions (i.e., Public Works) are necessary to offering a seamless visitor experience. Promoting internal understandings of tourism's benefits, hosting open conversations and including tourism leadership in broader planning discussions all contribute to sector success.

Visitor services training

A region cannot simply decide to promote itself as a "destination" and expect the tourism sector to thrive; there is plenty of planning and development that must first take place to be truly visitor-friendly. One key piece to this is ensuring stakeholders and other visitor-facing individuals have been properly trained to make visitors feel welcome and supported. This can be achieved through workshops (existing or customized), tutorials and on-demand modules.

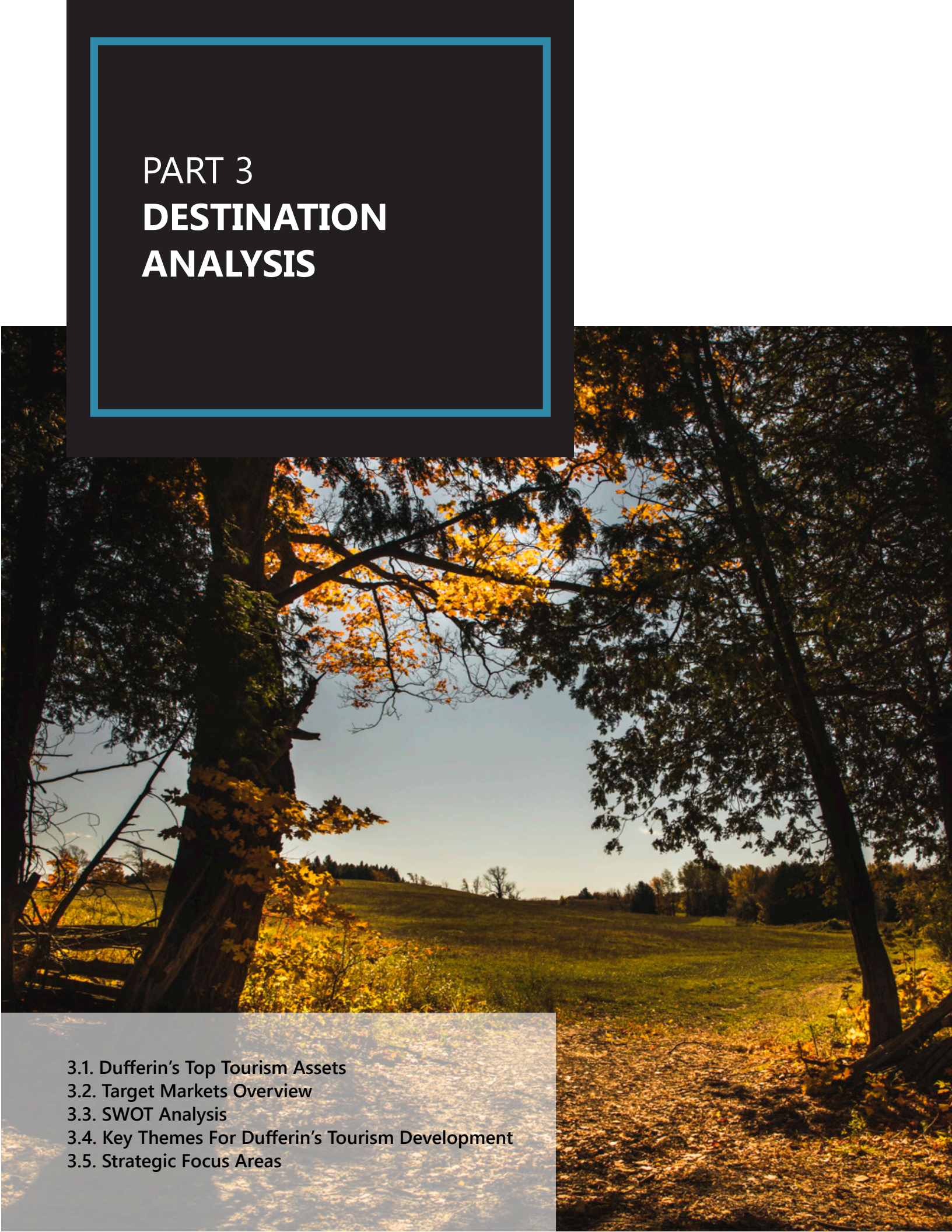


Proactive visitor management

One of the greatest risks of tourism development is overwhelming regional assets with visitors, which leads to the depletion of a destination's resources and appeal. Proactive planning to prevent this overwhelm is important. According to a report entitled, [Visitor Management, A Tool For Sustainable Tourism Development in Protected Areas](#), visitor management can be described as "an administrative action oriented towards maintaining the quality of park resources and visitor experiences." Techniques suggested within the report to reduce negative impacts include: "regulating access by area (zoning); regulating visitation by visitor type (through pricing); implementing entry or user fees; providing interpretation programs and facilities; regulating visitor behavior (codes of conduct); and concentrating on allowing accredited organizations to bring visitors to the site."

Supporting infrastructure

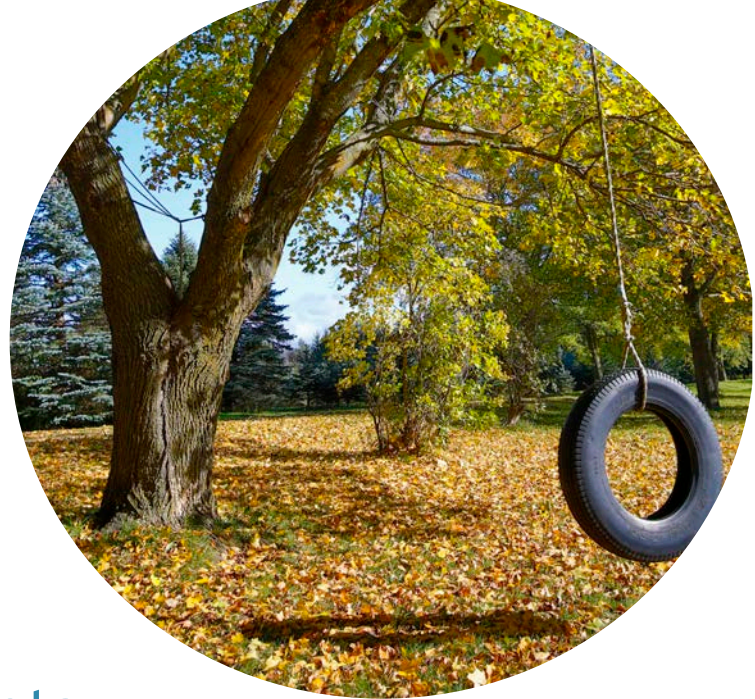
A tourism asset should not be considered visitor-ready unless the infrastructure available supports a seamless local interaction from start to finish. Having elements in place such as adequate parking, public restrooms, water stations, and bike racks (to name a few) remove barriers to access to visitors, and support the provision of positive destination engagement.



PART 3

DESTINATION ANALYSIS

- 3.1. Dufferin's Top Tourism Assets
- 3.2. Target Markets Overview
- 3.3. SWOT Analysis
- 3.4. Key Themes For Dufferin's Tourism Development
- 3.5. Strategic Focus Areas



3.1 Dufferin's Top Tourism Assets

The Strategy & Action Plan is based on building Dufferin's visitor economy through enhancing and expanding upon existing assets. Top potential tourism drivers include:

Nature & the outdoors

Dufferin's outdoor attractions, from trails and forests to rivers and conservation areas, are front and centre to its tourism appeal. Sharing the natural beauty of the region will be a cornerstone of itinerary and experience development, and these natural assets should also be a centrepiece for events and activities. Some specific natural assets in Dufferin County are:

Dufferin County Forest

The Dufferin County Forest is a multi-tract forested area spanning 1,066 hectares. In addition to its vital functions for biodiversity as a wildlife habitat and an area of natural heritage protection, it is a recreational asset that can be enhanced to act as a tourism driver. A more refined presence from a signage perspective, comprehensive maps and ongoing maintenance to parking lots and trails will support the Forest's evolution to a tourism-ready product. Maintenance of Forest trails is currently dependent on local volunteers, which have invested their own time and financial resources (with nominal County support) to do so for hikers and cyclists in the spring through fall, and fat bikers, snowshoers and cross-country skiers in the winter months. It is currently under the management of Dufferin's Public Works function.

Island Lake Conservation Area

Island Lake is a year-round destination, with trails and wetlands for visitors to hike, cycle or kayak in the spring, summer and fall; skate and snowshoe in the winter; and enjoy fishing no matter the season. Island Lake acts as a venue for live performances at its waterfront amphitheatre, and is home to annual events. The Town of Orangeville currently hosts a number of annual events here including the Great Canadian Pondspiel (an outdoor curling event) and twice-annual fishing derbies. There is an opportunity to conceptualize new, creative programming that can take place at Island Lake throughout the year, and to integrate Island Lake within itinerary development.



Agritourism

From farm stands and farmers' markets, to community-engaged experiences such as strawberry picking, pumpkin patches and Christmas tree farms, there are numerous opportunities for visitors to immerse themselves in Dufferin's agricultural offerings. Various agritourism assets are available from one municipality to another, with potential for further growth within this niche. The County can work with interested farmers to enhance existing experiences, build new experiences or, for those who have yet to consider agritourism revenue streams, conceptualize ideas and plan accordingly. Some popular approaches to agritourism include farm stays, farm tours and long-table meals.

[Landman Gardens & Bakery](#) (Landman's), a family-owned and operated business just outside of Grand Valley, is one of Dufferin's leaders in agritourism and a good example of what is possible in the region. An on-site farm store serving up homemade goods, farm-raised meats and locally-grown produce serves the community and visitors alike. Further, its historic Blackhouse has been used as a venue for cooking classes, farm-to-table dinners and small events, all of which are set to return as the limitations imposed by Covid-19 are lifted. Half the fun is in the getting there, as a journey to Landman's takes visitors through country roads, where expanses of agriculture & nature are on full display.

Developing content and itineraries that showcase the local agri-businesses will make it easy for visitors to experience a core feature of Dufferin's identity. As the agritourism sector develops, whole packaged experiences can be created that simultaneously entertain visitors and support local farmers.

Food & drink experiences

Throughout Dufferin, there is a range of culinary experiences to be enjoyed, whether fresh-made sandwiches at local general stores, fine dining, or anything in between. [Adamo Estate Winery](#), a small-batch boutique winery in the hills of Hockley Valley, offers an exclusive, remote and refined food and drink experience. It is already

drawing visitors from the GTA and other target markets, where visitors can enjoy winemaking, tasting tours, and unique event spaces. Its success is a notable indicator of potential for other similar institutions, whether wineries, breweries, cideries or the like. These institutions support a thriving visitor economy, create jobs and enhance the overall appeal of a destination.





Arts & culture

Largely known amongst residents and local stakeholders as a community with incredible artists, musicians, poets and other creatives, the arts & cultural draws within Dufferin County can stand alone or be combined with other like activities to create engaging experiences. Collaborating with the community and including local talent as a focal point of event and activity development will broaden the potential and maximize the positive impacts tourism will have throughout the region. Meanwhile, existing assets can be used to develop art trails and itineraries that showcase what Dufferin has to offer. Current top assets in this category include:

Museum of Dufferin

A stunning space amongst the hills of Mulmur Township, the Museum of Dufferin was built in the style of a barn, embodying the region's rural and agricultural roots. Its facilities include four galleries and four historic buildings, where visitors can find permanent, long-term and short-term exhibitions and art shows. It hosts an eclectic variety of events, programs and tours annually, driven by a mission to create "a place where everybody belongs" and to stimulate meaningful connections. The museum space and programming is a unique asset that will lend itself to supporting the County's tourism development, and from which itineraries can be built to ensure visitors here explore Dufferin's natural beauty, arts and culture and culinary appeal as well.

“ *In any community, arts and music is always a focal point to bring people together.* ”

- Stakeholder interview

Orangeville Blues & Jazz Festival

Known as a “community celebration” and a key tourism motivator for Orangeville, the Blues & Jazz Festival is Orangeville’s largest annual event. Featuring performances by provincial and Canadian artists, the Festival takes place throughout the downtown on four stages, complemented by additional live performances at local pubs and restaurants. Other activities enhance the experience, such as displays of classic cars and motorcycles, and interactive workshops. The Festival attracts upwards of 18,000 unique visitors, approximately 15 per cent of whom come from 40-80 kilometres outside of Town. As communities rebound from Covid-19 and major events are once again permitted, the Blues & Jazz Festival will remain a core tourism asset for Orangeville and Dufferin County at large.

Theatre Orangeville & the Opera House

Working with professional actors, choreographers, composers and musicians, Theatre Orangeville is the only professional theatre company in the Central Counties region. Presenting 12 to 16 productions and upwards of 150 performances year-round, patrons come from regions like Stratford, Collingwood and Toronto to immerse themselves in expertly-executed live shows at the historic Opera House, or Island Lake. Works range from classic favourites to new Canadian work. The Theatre has paved the way for inclusive practices through its youth programming and work with neuro-diverse adults and children, which results in an additional 25-30 productions (roughly another 50-60 public performances) annually. Enjoying a night out at the Theatre doesn’t start and end at the doors of the Opera House; guests are encouraged to enjoy dinner and explore Orangeville’s historic downtown before the show, and imbibe with a post-performance cocktail. In addition to theatre shows, the Opera House plays host to a variety of performances and events, bringing attention to and engagement with the downtown core year-round.



3.2 Target Markets Overview

According to data presented in the Central Counties Tourism [Visitor Research Program](#) (2018/2019), the Headwaters region Visitor Profile is as follows:

- Median age: 51 years
- Average household income: \$130,045
- 33.4 per cent identify as “visible minorities”
- 30.7 per cent were born outside of Canada
- 50.5 per cent of couples have children at home
- Nearly 76 per cent travel to work by car

(Note: Specific Dufferin statistics are unavailable)

Central Counties has also defined the region’s target markets, using a framework developed by Destination Ontario. Of the 12 segments defined, the RTO has identified four that hone in on those most applicable to its tourism offerings, all of which are relevant to Dufferin.

These include Knowledge Seekers, Connected Explorers, Up and Coming Explorers, and Nature Lovers. An additional segment, not identified by Central Counties though applicable to Dufferin, particularly as it relates to Orangeville’s tourism product, is Outgoing Mature Couple. Each is [defined by Destination Ontario](#) as follows, for consideration in product development and marketing:

Knowledge Seekers

Travellers in this segment are looking to appreciate and understand the places they visit. Their trips are typically about expanding their knowledge and stimulating their minds rather than resting and relaxing. They are driven by a desire to explore culture, history, architecture and natural landmarks and often focus on sight-seeing, museums, galleries and historical sites.

Connected Explorers

Connected Explorers are young couples under 40, both with and without children. They are a confident, youthful, optimistic group. They have a deep-seated need to travel and expose themselves to many new experiences. Travel for them is about expanding their horizons, and they are looking for a fully packed schedule of activities. Technology is a key part of travel. They use it throughout all phases of a trip including researching, booking, planning and especially when sharing their travel experiences once back home.

Up and Coming Explorers

This is a youth-oriented group that is on its way up in the world. These travellers are emerging into a new life-stage, often characterized by greater affluence and new opportunities. Visible minorities and immigrants often fall into this segment. Travel is not about connecting with family or friends. While these people often want to be adventurous and energetic, their travel experiences often start with core tourist attractions. Ontario and the active outdoors is popular, with visitation typically being very recent.

Nature Lovers

This is a consumer segment attracted to outdoor experiences aligned to Ontario’s quintessential parks & lakes offering. Camping and associated activities, e.g., hiking, canoeing, fishing are key interests for this group. The majority classify as “nature lovers”. Activities align with the recreational aspects of the outdoors and not necessarily the extreme aspects of the outdoors, e.g., avid angling or hunting.

Outgoing Mature Couples

Skewing strongly toward seniors and those in retirement, these travellers are driven by a desire to maintain their vitality and connection with the world. They are not particularly adventurous, rather they mainly want to interact with new people (travellers and locals alike). It is important to them to feel competent, accomplished and energized.

Notably, while demographics play into these definitions, the larger focus is on interests, which helps to inform Dufferin’s approach to

developing tourism collateral, conceptualizing new events & activities, and allocating marketing dollars. These segments can be found or targeted within the following groups:

Residents: Those who live within Dufferin County, and are eager to explore it further though in need of clear advice and direction as to what to see & do.

Visiting friends & relatives (VFR): Friends & relatives of those who live within County limits, who would like to see and experience the area in which their loved ones live.

Leisure travellers: Those who have no local connection to Dufferin, residing within a 1.5/2 hour drive; they will likely discover Dufferin County through online searches, social media or recommendations from their social network.

To properly appeal to these visitors, Dufferin should be mindful of enhancing, developing and packaging tourism experiences that will entertain the aforementioned visitor segments who choose to visit for day trips or multi-day visits (staying one or more nights in Dufferin).

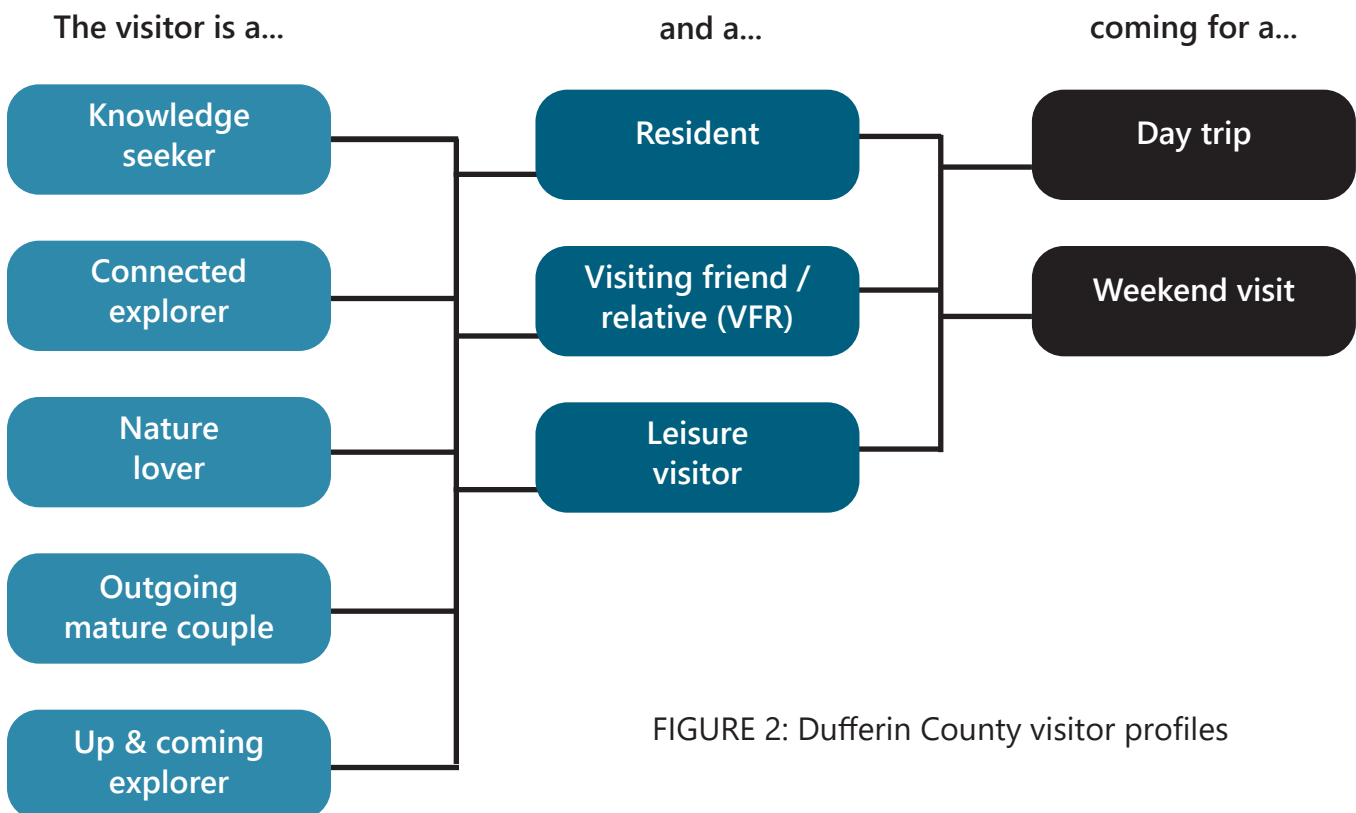


FIGURE 2: Dufferin County visitor profiles

3.3

SWOT Analysis

Through an extensive research, engagement and analysis process, the following strengths, weaknesses, opportunities and threats have been identified with regard to Dufferin's tourism development:

STRENGTHS

- Dufferin County is making investments in a tourism strategy, indicating buy-in to its importance & potential for economic development
- Dufferin is new to tourism development, creating an opportunity to design tourism growth to its liking
- There is a demonstrated movement toward more active inclusion of Indigenous Peoples in the County narrative (i.e., [newly created Land Acknowledgment](#))
- There are many volunteers throughout the County who dedicate their time to creating/maintaining community assets and experiences that can be utilized for tourism development
- Dufferin is home to an artistic community (performers, sculptors, potters, painters, etc.), and attractive festivals & events (largely Blues & Jazz in Orangeville)
- Local business owners throughout Dufferin are open to opportunities that tourism brings; there is a general confidence that the majority of these businesses will survive the challenges of Covid-19
- Dufferin's communities are diverse, kind and welcoming; there are charming small towns throughout
- The services of the Orangeville Visitors Centre direct visitors to Dufferin County assets
- Certain tourism assets already exist to attract visitors to the area, such as Theatre Orangeville, Mono Cliffs, Museum of Dufferin, and Adamo Estates Winery, to name a few
- There is an array of parks, conservation areas, forests, trails and rivers for hiking, skiing, cycling, fat biking, fishing, and other outdoor activities, appealing to a range of ages, skill levels, etc.
- Tourism asset maps already exist, which will support future product development, itinerary creation, etc.
- Unique dining experiences are available throughout Dufferin
- EV chargers are ideally located throughout the County, likely to be attractive to sustainably-minded visitors
- Dufferin is home to the "Rosebud Motel" from CBC's Emmy-award-winning show, *Schitt's Creek*
- Dufferin is in close proximity to many potential source markets such as Toronto/GTA, Golden Horseshoe, Kitchener/Guelph/Waterloo, etc.; "a natural oasis close to the city"
- Dufferin is small in size, which means various activities are within short distances from one another
- Work has been done on a wayfinding/gateway sign strategy, with some signs already installed
- The current inDufferin visual brand was developed with tourism promotion in mind
- There is an existing tourism web presence, offering a solid basis from which to build an effective promotional platform

“ “ *We have tourism assets. Now, what we need is a unified voice to bring it all together.* ” ”

- Stakeholder interview

WEAKNESSES

- There is a perceived hesitation to buy-in to tourism development & investments from some local government; in some cases, this hesitation also exists to a degree at a residential level
- There is a lack of resources/capacity for Tourism Strategy & Action Plan implementation at the County level; there is currently no dedicated tourism development staff, nor are there systems or structures in place to support tourism-focused initiatives
- There are disconnects between municipalities, and within Dufferin, as it relates to relevant development initiatives, promotional activities, etc.
- Red tape at Council and Municipal levels has halted development of tourism assets (i.e., noise bylaws + Island Lake, brewery development in Mono, Airbnbs, etc.)
- Community groups that support various tourism-related initiatives often see volunteer burnout
- There is no committed County focus on visitor services (i.e., a visitors centre) (notably, likely due to the prior absence of committed tourism resources on a County level)
- There is nominal knowledge/understanding of tourism's potential and best practices among tourism stakeholders and prospective tourism stakeholders (including agricultural businesses)
- There are few linked experiences throughout Dufferin and holistically tourism-ready experiences; resources are not currently in place to coordinate with various groups or integrate experience development into a common vision
- There is a gap in year-round tourism product
- There are few accommodation options that appeal to a visitor seeking a mid-range, boutique hotel experience
- Some municipalities are further ahead in tourism development / have more tourism-ready assets than others
- There is lack of access to drinking water, public restrooms for visitors
- Retailers throughout various municipalities are closed on Sundays, and close early on weeknights
- Infrastructure to accommodate anglers (i.e., parking lots, accessibility to fishing holes through private property) has not yet been developed
- There is limited consistency and/or enticing presence of tourism wayfinding & signage
- Dufferin County is not a recognized tourism brand or destination, nor has it developed a brand story, for effective, cohesive marketing; it has yet to be differentiated enough from the "Headwaters" brand
- There is a lack of universal broadband access / connectivity across the County, firstly impacting a tourism business's ability to properly establish an online presence, and secondly, hindering some ability of visitors to share their experiences on social media while in-destination

OPPORTUNITIES

- Define the brand identity from a key messaging perspective, to guide a content and inclusive marketing strategy and appeal to key markets
- Establish processes for communication and collaboration internally among County functions, and between the County, municipalities, stakeholders, community groups, etc.
- Invest in individual municipalities to enhance tourism appeal, including tourism readiness training / Tourism Readiness Toolkits for stakeholders
- Collaborate with Orangeville, RTO6 to develop experiences and enhance tourism infrastructure
- Build outdoor learning programs for schools, utilizing tourism assets
- Integrate stakeholder and community participation to help define, direct and advocate for tourism development
- Consider Dufferin County residents to be a target market; introduce them to experiences in their own backyard and prime them to act as local tourism ambassadors
- Develop infrastructure in order to better appeal to visitors (i.e., signage, parking lots, cycling loops, trails, etc)
- Develop tourism product where it does not currently exist and seek opportunities for enhancements where it does; work with stakeholders to create marketable experiences
- Centre experiences on natural assets, agritourism, arts and culture, and small town charm
- Work with farms and agricultural businesses to develop agritourism experiences; position the brand to visitors as a place to engage with the people and places where their food comes from
- Enhance infrastructure to create positive visitor experiences
- Leverage the demand for connectedness, outdoors, nature that has come with Covid-19

THREATS

- There could potentially be a lack of buy-in from municipalities or Council, leading to a lack of funding for enhancements, development for effective tourism development
- There could potentially be a lack of buy-in from residents or stakeholders, impacting the in-destination visitor experience as a result
- Unmanaged tourism development would disrupt natural assets and quality of life for residents
- Covid-19 could impact local businesses and the economy, in turn, affecting local tourism appeal
- (i.e., if downtowns are shuttered without retailers, they would not be attractive tourism assets)
- Climate change impacts year-round planning, particularly with regard to snow/cold weather-based winter activities
- There could potentially be a lack of commitment to inclusive marketing and promotion, impacting the destination's appeal to all target market

3.4

Key Themes in Dufferin's Tourism Development

As concluded from the SWOT analysis and further confirmed by research and community engagement efforts, the following considerations must be embedded to Dufferin's successful tourism development:

Structural support

For the effective implementation of this Strategy & Action Plan, dedicated human resources should be allocated. Further structural supports required include that from functions outside of Development & Tourism as needed, particularly as it relates to infrastructure maintenance and development.

Product development

Understanding what local tourism assets are ready to serve tourists and where there are opportunities for enhancements, refinements or development will be an ongoing piece of Dufferin's tourism growth and evolution. Continued product development will ensure Dufferin remains enticing to target markets.

Brand development

As a first step to tourism development, a clear, concise and engaging brand must be established. This will impact marketing and promotional activities, communications, and overall approach to carrying-out this Plan. As described by the United Nations World Tourism Organization (UNWTO) [Handbook on Tourism Destination Branding](#), "A destination brand can: help destinations compete more effectively for visitors; assist in the projection of a country's, a city's or a region's overall image; and occasionally help transform the image of a county, a city or a region."

Tourism readiness

Properly preparing stakeholders and municipalities to welcome guests and offer positive experiences at all touch-points is foundational to establishing a successful visitor economy.

Diversity & inclusion

Recommendations throughout this Strategy & Action Plan should be guided by diversity & inclusion best practices, from community engagement & product development to marketing & promotions to maximize appeal within target markets.

Collaboration

Success in tourism will only be achieved with active and ongoing collaboration between any combination of the following groups; County functions, stakeholders, municipalities and other tourism bodies.

Communication

In the interest of transparent tourism development that garners buy-in and enthusiasm, open and honest communication must be a priority; communication with County staff & council, municipal representatives, stakeholders and the community at large.

Conservation & preservation

The characteristics that define Dufferin County—its natural assets, culture & communities, charming small towns and agricultural appeal—should not be compromised in order to accommodate tourism developments. Instead, tourism developments should only enhance these local assets.

3.5 Strategic Focus Areas

Six overarching areas of focus have been developed to guide the Strategy & Action Plan, each of equal importance to the tourism development process for Dufferin. Detailed recommendations with associated action items can be found in Part 4.

1.

Structure & Process

This refers to staffing, priorities and collaboration between functions at the County of Dufferin. Internal buy-in and continued commitment to tourism development will determine the success of the Strategy & Action Plan.

Goal: To allocate resources, both human and financial, to lead execution of Dufferin County's Tourism Strategy & Action Plan and facilitate collaboration between County functions, municipalities and stakeholders.

2.

Community Involvement

This refers to how Dufferin County residents, business owners, community groups & public institutions can be engaged in tourism development, fostering buy-in to tourism initiatives and support the evolution of spirited communities that are enjoyable to visit.

Goal: To prioritize community engagement in tourism development initiatives, create opportunities for ongoing dialogue with tourism leadership, and support those who work to enhance local tourism development through volunteerism.

3.

Product Development

This refers to the tourism assets and associated stakeholders that will attract visitors to the region and with which/whom they will interact throughout their stay in Dufferin County.

Goal: Enhance existing product offerings, and develop new experiences where needed, to attract high-spending, respectful visitors to Dufferin and ensure positive interactions throughout their visit.



4.

Infrastructure Development

This refers to the presence of proper infrastructure & investments necessary for a positive, well-rounded visitor experience.

Goal: Make strategic investments in infrastructure development to broaden the inventory of tourism-ready assets, and to elevate the visitor experience throughout Dufferin.

5.

Regional & Environmental Considerations

This refers to factors such as location, climate, geography and the protection & preservation of natural assets.

Goal: To ensure continued protection and preservation of Dufferin's natural assets while creating valuable visitor experiences.

6.

Brand & Marketing

This refers to the work that needs to be done in brand development and storytelling in order to build awareness of Dufferin County as a destination, attracting visitors to interact with various experiences, and creating incentives for return visits.

Goal: Leverage the existing inDufferin brand for tourism promotion in conjunction with engaging storytelling in order to build name recognition of Dufferin County and elicit interest & engagement from prospective local and regional visitors.



PART 4
VISION,
RECOMMENDATIONS
& ACTION PLAN

4.1 Vision for the Future
4.2. Recommendations & Action Plan

4.1 Vision for the Future

As identified by Dufferin’s Economic Development function, tourism presents a key opportunity for diversifying and supporting the local economy. By all indication, the County is in an opportune position to move forward with investing in the sector—there are existing assets that can be further developed or enhanced to attract visitors, there is a creative and engaged community, and there is rising demand for experiences like those available in Dufferin. In its infancy stages, tourism development must be about putting necessary pieces in place to ensure positive visitor experiences, which in turn will lead to recommendations and multi-seasonal returns. What will this look like for Dufferin County, with the implementation of this Plan?

- There is a dedicated County team member, tasked with carrying out the Tourism Strategy & Action Plan, and accountable to its progress and adaptation. The role will include leading tourism readiness initiatives, and facilitating private and public collaboration efforts, stakeholder and public engagement, and tourism marketing and content development.
- Individual municipalities feel supported in their individual tourism development initiatives.
- Stakeholders from different sectors (agriculture, retail, food & drink, etc) and community volunteers who support tourism development feel supported by the County.
- Agricultural operations within Dufferin have begun to diversify, or are considering opportunities to diversify, their offerings for agritourism purposes.
- Residents of Dufferin County have a better understanding of the breadth of product and experiences within the County, engage with tourism assets regularly, and share their experiences on social platforms.
- Residents of Dufferin County understand the benefits of tourism to the community, and work with municipal leaders to support sustainable tourism initiatives.



- The County provides ongoing support for the development of outdoor recreation spaces & experiences.
- There are plans to develop a hub within Dufferin County to showcase artistic talents and creative works of the community, which attracts visitors from within the County and beyond.
- There is a dedicated tourism website with robust content featuring the region's people, places and experiences.
- Appealing to the socially conscious traveller pays off, evident in the diversity of visitors and partnerships with BIPOC communities in product development.
- More people who would traditionally drive through Dufferin County on their way to somewhere else now stop to enjoy local experiences.
- There is notable and moderate growth in tourism arrivals to the region; visitors arrive with the understanding of their duty to respect Dufferin County's land and its communities.
- The Dufferin County brand is more widely recognized for its tourism appeal, particularly among target consumers, demonstrated through visitation, media mentions, and social media engagement.
- Local stakeholders work together and with the County tourism leader to promote other nearby businesses and events.

5 year vision

By 2026, Dufferin County will be established as an emerging destination not far from Toronto that connects people to the land, through nature and agriculture; to each other, through arts, culture, history & heritage; and to themselves, through scenic, off-grid experiences.



4.2 Recommendations & Action Plan

The following recommendations & action plan have been developed in the interest of effectively working to achieve the five-year vision.

1.0. Structure & Process

1.1.

Establish a Tourism Manager role to ensure consistent oversight of tourism development at the County level, and demonstrate commitment to sector growth within the region.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.1.1. Allocate & approve budget for a full-time Tourism Manager position, for an early 2021 start.	Y1, Q1	Budget approved for Tourism Manager position, filled in early 2021.	\$87,000 - \$96,000
1.1.2. Task the Tourism Manager to carry-out the Tourism Strategy & Action Plan, leading tourism conversations and initiatives amongst the County team & within the community.	Y1, Q1 Ongoing	Active, dedicated, ongoing commitment to regional tourism development.	n/a
1.1.3. Position the Tourism Manager as the representative of sector development locally, regionally, provincially and federally, responsible for representing the best interests of Dufferin's tourism sector within relevant private, public and government bodies as opportunities arise.			
1.1.4. Introduce the Tourism Manager to stakeholders through County-wide email; distribute press release to local media.			
1.1.5. Join relevant tourism bodies such as the Tourism Industry Association of Ontario, Indigenous Tourism Ontario, and the Tourism Industry Association of Canada.		Active involvement in & engagement with regional tourism bodies.	

1.2.

Restructure County staff responsibilities to place tourism assets, in whole or in part, within the responsibility of the Tourism Manager.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.2.1. Align with Public Works to discuss a redistribution of responsibilities as it relates to the Dufferin County Forest, ensuring proper vision and support is available to develop the Forest into a market-ready tourism asset.	Y1, Q1	Tourism assets defined as such, and given attention from Tourism Manager.	n/a
1.2.2. Discuss internally if there are other County assets under other functions which should be transferred to the responsibility of the Tourism Manager.			
1.2.3. Should the County acquire new assets, include the Tourism Manager in the categorization / allocation of responsibilities.	Ongoing		

1.3.

Develop & implement processes for inter-functional collaboration, to ensure tourism considerations are kept in mind through all areas of planning & development.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.3.1. Task County functions with engaging the expertise of the Tourism Manager, if deemed relevant based on the following considerations: - Does this project or decision directly or indirectly affect access to or development of Dufferin County tourism assets? - Does this project or decision influence how visitors or residents engage with the County? - Is there potential for this project or decision to impact tourism initiatives, either positively or negatively? - Could this project or decision influence outside perception of the County?	Ongoing	Tourism considerations are top-of-mind throughout County functions & development that is recognized within the community.	n/a
1.3.2. Include the Tourism Manager within Pre-consultations Meetings, as deemed necessary by the Development & Tourism function.	Ongoing		

1.4.

In collaboration with County municipalities, explore what processes can be created for municipal participation in tourism development decisions and initiatives.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.4.1. Set-up one-on-one meetings with appropriate representatives from each municipality to discuss local tourism priorities, as it fits within the County-wide Strategy & Action Plan; offer ongoing support and guidance to ensure mutual commitment to achieving common goals.	Y1, Q1-2	Relationships established & nurtured between Tourism Manager & key municipal contacts, with open lines of communication & collaboration in place.	n/a
1.4.2. Establish regular meetings (ideally, quarterly, but bi-annual at a minimum) with representatives of the County's municipalities to ensure ongoing alignment of initiatives and open lines of communication, for the purpose of discussing tourism developments, upcoming initiatives, opportunities for collaboration, etc.	Y1, Q1 Ongoing		
1.4.3. Create a regular newsletter to share regular tourism updates with municipal representatives (see Recommendation 1.5); distribute via Mailchimp or a similar system.			

1.5.

Create a communications plan to regularly update tourism stakeholders and municipalities on relevant news, opportunities and initiatives.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.5.1. Invest in CRM software to use in refining & maintaining a County-wide stakeholder database.	Y1, Q1	Relationships established & nurtured between Tourism Manager & key municipal contacts, with open lines of communication & collaboration in place.	\$200 / month
1.5.2. In partnership with the Economic Development Officer, segment the stakeholder database based on various details including tourism readiness, municipality, and business versus municipality.			
1.5.3. Collaborate with the Economic Development Officer to create a newsletter template for monthly distribution. Suggested inclusions are: <ul style="list-style-type: none"> - Notable progress updates to Tourism Strategy execution - Tourism developments throughout municipalities - Community-building elements to help create relationships between stakeholders, municipalities - Grant & funding opportunities - Social media content (including text + video/ images) that stakeholders can post on their own platforms, showcasing upcoming activities, local events, etc. - Updates & resources from relevant bodies such as TIAO, TIAC, ITO, etc. - Covid-19 recovery updates & resources - Other content such as "Required reading," "Business Spotlight" 			
1.5.4. Depending on demand, consider expanding channels through which the County engages and shares updates with stakeholders and municipal representatives, such as incorporating social media (particularly a private Facebook page).	Y2		

1.6.

Commit to following the benchmarks presented in the Tourism Strategy & Action Plan for effective tourism development.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.6.1. Ensure all County functions are aware of the Tourism Strategy & Action Plan, and the role each department lends to its success.	Y1, Q1	Benchmarks as presented here-within are adhered to.	n/a
1.6.2. Hold the Tourism Manager accountable for executing the strategy, or adapting benchmarks based on changing circumstances as necessary.	Ongoing		
1.6.3. Utilize the support and direction of the Tourism Advisory Committee (see Recommendation 2.1).			
1.6.4. Submit an annual report about Dufferin's tourism development to County Council.	Q4, annually	County Council briefed annually on tourism progress.	

1.7.

Implement systems for tracking visitor arrivals and understanding visitor profiles.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.7.1. Utilize the Tourism InDufferin webpages to capture consumer e-mail addresses. Add to a consumer-focused newsletter list; introduce a "welcome" e-mail upon subscription that includes a short survey to gather consumer perceptions, plans to visit Dufferin, etc.	Y1, Q2	Greater understanding of local tourism arrivals (#) and visitor profile; tourism arrivals KPIs should be established in Y4/5 of Tourism Strategy implementation.	TBD
1.7.2. Explore how Dufferin can work with the Town of Orangeville to establish a system by which the Visitors Centre collects visitor data from a County-wide perspective.	Y2		
1.7.3. Monitor best practices for visitor data collection and segmentation utilized by Central Counties and Destination Ontario, to further define target markets and better direct promotional efforts.	Ongoing		

1.8.

Explore the opportunity of working with the Town of Orangeville to combine Visitor Centre services.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
1.8.1. Meet with the Town of Orangeville to explore potential for collaboration in utilizing its existing Visitor Centre services, understanding potential financial commitments, benefits for combining efforts & resources, and a plan to move forward.	Y2	Utilize existing visitors' service resources to the benefit of Dufferin County overall.	TBD
1.8.2. Introduce an online chat function on the Tourism inDufferin webpage whereby prospective visitors can submit questions, overseen by Visitors Centre staff.		Well-developed tourism services at key County assets.	
1.8.3. Train & prepare staff and representatives at key tourism assets (i.e., Museum of Dufferin) to effectively serve visitors as required.			
1.8.4. Invest in digital tourism kiosks to be placed at key spots throughout the municipality, such as: Parking lot at Dufferin County Forest Main Tract, Museum of Dufferin, Orangeville Visitors Centre and/or Opera House; work with supplier, as well as municipal bodies, to develop content as needed (likely to evolve from Recommendation 6.2.0).	Y3-Y5	Digital tourist information kiosks available to enhance visitor experience.	\$6,000 - \$12,000 / each

2.0. Community Involvement

- 2.1.** Form a Tourism Advisory Committee (TAC), prioritizing the culmination of diverse perspectives; include representatives from key tourism areas (i.e. parks, agritourism businesses), community groups, and 2SLGBTQIA+ & Black, Indigenous, People of Colour (BIPOC) stakeholders & residents.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
<p>2.1.1. Identify individuals or groups from which the County should recruit participants for the TAC. Criteria should include but not be limited to:</p> <ul style="list-style-type: none"> i. Participants must live or work in Dufferin County, with some connection to or interest in local tourism development. ii. Participants must be willing to dedicated 1 hour/monthly to sharing insights with the Tourism Manager as needed, and commit to quarterly meetings, approximately 3 hours / each. iii. Participants must bring a unique perspective, representative of a greater community within Dufferin County (i.e. sports, arts & culture, active outdoor experiences, festivals & events, private retail, community development, etc). iv. Participants must not be a sitting member of Council for any of the municipalities. <p>Those identified should be invited individually by the Tourism Manager. If individuals recruited decline the opportunity, an open call for applicants should be issued. <i>Note: Participation should be voluntary, without remuneration; however, the County should allocate a small budget for an annual gift or dinner as a gesture of appreciation.</i></p>	Y1, Q2	Creative ideas, community connections & tourism enhancements all result from the TAC's contributions.	\$1,000 / year
<p>2.1.2. Define goals, roles & responsibilities for the TAC, building from the following framework.</p> <p>Objective:</p> <ul style="list-style-type: none"> - To offer unique perspectives and recommendations to the Tourism Manager that will guide the implementation of Dufferin's Tourism Strategy & Action Plan - To provide the Tourism Manager with community perspectives and considerations that will ensure a holistic approach to tourism development - To work cooperatively with the Dufferin Tourism Manager to identify opportunities for product development, brand promotion, marketing, etc. 	Y1, Q2		n/a

- To liaise with stakeholders and residents within their network, for the purposes of information gathering and tourism promotion, in turn, offering further direction to Action Plan implementation

- To participate in the ongoing implementation of the Tourism Strategy & Action Plan, and support modifications as needed throughout the process

Role & responsibilities:

Working directly with Dufferin’s newly-appointed Tourism Manager, the Tourism Advisory Committee is intended to be a collaborative body that represents Dufferin stakeholders & the community at large in regional tourism development decisions. The Committee shall:

- Identify tactics to strengthen Dufferin County tourism experiences, and opportunities for new product development

- Be a representative for tourism development within their network, while being a representative for their network on the Committee

- Advocate for tourism initiatives & investments which support the implementation of the Tourism Strategy & Action Plan, for the greater good of one’s own community

- Track the progress of tourism development based on Strategy benchmarks, and guide adaptations to the Strategy & Action Plan as needed based on current circumstances and community understandings

- Support the Tourism Manager in foreseeing barriers to tourism development & strategies to overcome said barriers

- Offer strategic direction to marketing & promotional activities

- Promote tourism growth & wins within Dufferin

Considerations:- Engage an individual from Orangeville’s Tourism Advisory Committee or Economic Development function to be part of Dufferin’s Tourism Advisory Committee, to ensure all areas for collaboration are identified as early on in the tourism development process as possible.

2.2.

Dedicate County resources to supporting volunteer organizations responsible, in whole or in part, for managing or maintaining tourism assets (i.e. arts groups, Dufferin County Forest, etc).

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
2.2.1. Meet with community groups and organizations whose work supports tourism development (such as Dufferin County Arts Council, Team Van Go, Athletes Institute, In The Hills magazine) to understand opportunities for collaboration and areas in which Dufferin can provide support.	Y1, Q2	Volunteer groups supporting tourism development initiatives feel supported, appreciated by the County.	\$5,000 - \$8,000 / annually
2.2.2. Determine what internal resources, whether human or financial, can be dedicated to supporting the work of community groups as it impacts tourism development; lean on other County functions when relevant or necessary.			
2.2.3. Develop an internal plan for working with community groups as they are identified to ensure sustainable, ongoing collaboration and mutual benefits. This plan should include benchmarks for success, an allocation of nominal financial resources to be distributed at the discretion of the Tourism Manager, an allotment of hourly commitments from County staff, etc.			
2.2.4. Evolve or adapt support provided to various community groups based on each group's involvement in attracting visitors & enhancing visitor experiences, as the Tourism Strategy & Action Plan is implemented.	Ongoing		

2.3.

Explore opportunities for youth involvement through the establishment of internship & volunteer programs.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
<p>2.3.1. Consult with educators from Dufferin-Peel school boards and Georgian College's Hospitality, Tourism and Recreation program on ways secondary and post-secondary students might be engaged in the evolution of Dufferin County as a destination (i.e., partnerships involving internships, completing volunteer hours, summer work positions, etc.).</p>	Y2	Youth involvement in Dufferin's tourism development.	TBD
<p>2.3.2. Develop program structures respective to high school (i.e., volunteer hours, summer jobs) and college (i.e., co-ops, internships, summer jobs) student needs, including:</p> <ul style="list-style-type: none"> - Program goals and objectives - Job/position descriptions (i.e., rates of pay, length of position, etc.) - Supervisory roles and processes - Application, recommendation and selections processes - Measures of completion (i.e., performance review, grading system, etc.) - Post-position trajectory (i.e., potential for full-time employment, referral letters, etc.) 			
<p>2.3.3. Work with Dufferin-Peel school boards and Georgian College to launch programs ahead of each semester; review and evolve the programs based on successes, challenges, and student & faculty feedback.</p>			

2.4.

Create and manage a “Local Guides” program whereby residents can volunteer as destination hosts, to guide visitors throughout the duration of their stay or at select sights (based on resident knowledge/expertise).

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
2.4.1. Develop a framework, Code of Conduct and requirements for a Local Guides program.	Y3	Visitors can easily access the knowledge, insights of locals for enhanced tourism experiences.	n/a
2.4.2. Recruit and create a database of diverse local guides, based on their interests and expertise; a focus on offering guides for tourism-ready assets must be priority.			
2.4.3. Dedicate a webpage to featuring local guides, including their headshot, a brief bio, and how they can enhance a visitor’s experience (i.e. accompany on a ride through the County Forest, accompany fly-fishing, guide through the region’s arts scene, a historic walk through Downtown Orangeville, etc).			
2.4.4. Develop a communications channel for Dufferin to connect visitors with guides.			

2.5.

Engage with Upper Grand District and Dufferin-Peel school boards to develop outdoor learning programs; with time, expand initiatives to other regional school boards.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
2.5.1. Determine areas of the school curriculum where outdoor learning can be incorporated, based on grade.	Y3/ Y4	Enhanced community engagement with local tourism assets through collaboration with local schools, in turn encouraging students to return to various sights & experiences with their families.	n/a
2.5.2. Engage with school board leaders to discuss opportunities for students to use County assets, such as the Dufferin County Forest, as an outdoor classroom, of sorts.			
2.5.3. With the guidance of school boards, prepare at-home learning programs that allow students to engage their families to explore Dufferin during their evenings and weekends.			

3.0. Product Development

3.1.

Create Tourism Readiness toolkits and training programs to support the growth, evolution & refinement of tourism assets throughout the region.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
<p>3.1.1. Drawing from existing Tourism Readiness resources available via TIAO, TIAC, etc., create a general Tourism Readiness toolkit to support the enhancement of existing tourism-ready product. Elements should include but not be limited to:</p> <ul style="list-style-type: none"> - Introduction to tourism benefits - The basics of tourism readiness - Product development & experience creation - Guest services - Brand & storytelling - Marketing & promotion - Measurements of tourism readiness <p>Offer two versions with modified content to appeal to stakeholders based on their tourism readiness level; one for those who are more advanced and another for those at the beginning of their tourism development journey.</p>	Y1, Q3	Tourism Readiness Toolkits and workshops available to stakeholders; stakeholders find value in the content, support provided.	\$3,000 / annually
<p>3.1.2. Develop a schedule of workshops, available live or via recordings, to support the implementation and utilization of toolkits.</p>			
<p>3.1.3. Utilize the stakeholder newsletter to promote additional tourism readiness learning opportunities available through organizations such as TIAO & TIAC.</p>	Ongoing	Stakeholders feel continuously supported in their ongoing participation in tourism development initiatives	
<p>3.1.4. Offer individual support to stakeholders in guiding their tourism development efforts, as needed; prioritize those stakeholders whose prospective contributions to tourism development are expected to be most impactful.</p>	Y1, Q3 Ongoing		

3.2.

Consult with the Dufferin County Cultural Resource Circle, Indigenous Tourism Ontario (ITO), and other Indigenous leaders to determine ways in which Dufferin can integrate Indigenous history & storytelling throughout key sites & experiences.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
3.2.1. Meet with Indigenous Tourism Ontario to present the Tourism Strategy & Action Plan. Garner feedback and discuss opportunities for collaboration.	Y1, Q3	Relationship with Indigenous Tourism Ontario, DCCRC prioritized & developed.	n/a
3.2.2. Invite a representative from the DCCRC to join the Dufferin Tourism Advisory Committee.			\$5,000 - \$8,000
3.2.3. Allocate dollars annually to allow for enlisting Indigenous consultations in carrying-out the Tourism Strategy & Action Plan.			

3.3.

Leverage tourism-ready assets to curate thematic packaged experiences and circuit routes, based on the core tourism drivers in the region (i.e. nature & the outdoors, arts & culture and/or agritourism).

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
<p>3.3.1. Identify sightseeing and experiential themes within Dufferin that together support a stronger tourism narrative. Examples may include:</p> <ul style="list-style-type: none"> - TV & Film routes: Featuring notable filming locations for various TV shows & movies - A "Trails Trail": Connecting the hiking & cycling experiences throughout Dufferin - Public Art routes: Showcasing the artists, studios and artistic works on display - Fun for the whole family: Activities & experiences which can be combined to entertain and engage young families - Country roads: Visually-stimulating driving routes, connected for various reasons whether it be art, views, fall colours, etc. - Farm to table: Routes that showcase local farm stands, farmers' markets and restaurants that serve locally-grown produce - Dining in Dufferin: Routes showcasing Dufferin restaurants, potentially built out thematically (i.e. desserts, farm-to-table ingredients, unique interiors, etc) 	<p>Y1, Q3 Ongoing</p>	<p>Easy, accessible, clear packaged experiences available for visitor consumption</p>	<p>n/a</p>

3.3.2. Develop itineraries accordingly, and work with the GIS function to create comprehensive maps, offering detailed direction and information to ensure one-stop planning for prospective visitors.			
3.3.3. Make itineraries available online via the Tourism inDufferin website, in responsive format			
3.3.4. Ensure relevant stakeholders are aware of itineraries in which they are featured, and encourage cross-promotion.			
3.3.5. Remain up-to-date on new mapping technology via Esri, and utilize as deemed appropriate for continued provision of comprehensive mapping.			
3.3.6. Continue to develop new packages and itineraries as product readiness evolves throughout Dufferin.	Ongoing		
3.3.7. Monitor changes in ownership and development plans of the Rosebud Hotel property, and explore opportunities for collaboration should it be developed for tourism purposes.	Ongoing		n/a

3.4.

Explore opportunities to collaborate with stakeholders, RTO6 and municipalities outside Dufferin County for the purposes of experience creation based on tourism themes (i.e. nature & the outdoors, arts & culture and/or agritourism).

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
3.4.1. Organize meetings with prospective regional tourism partners to discuss potential for collaboration. Some examples may include Caledon, Alton, Bruce County, Grey County and Uxbridge. Explore opportunities for joint itinerary building, tourism marketing and promotion, and content development; create a plan and process for developing relevant assets & collateral as needed. Involve municipal representatives as appropriate.	Y2	Ongoing collaboration with municipalities, regions outside of Dufferin County that drives tourism arrivals.	TBD
3.4.2. Utilize themes presented in 3.1, and suggestions presented by the TAC, municipalities & stakeholders, as initial direction for potential collaborative efforts.			
3.4.3. Establish agreements that clearly outline brand, promotional and financial expectations from all parties involved prior to carrying-out collaborative plans.			

3.5.

Develop a four-season Activities & Events Plan to feature core tourism assets, help to build the County’s tourism narrative, and establish year-round attractions to engage visitors & residents.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
3.5.1. Work with stakeholders, municipalities and Central Counties to map-out activities & events throughout the region, whether private or public.	Y2 / Y3	There are few gaps in the annual events & activities calendar; events & activities supported by content to promote & entice visitation.	TBD
3.5.2. Build an activities & events calendar for the Tourism InDufferin website, showcasing ongoing opportunities for visitors and residents to engage with one another throughout Dufferin.			
3.5.3. Identify gaps within the calendar, and work with the Tourism Advisory Committee, stakeholders and municipalities to conceptualize new, attainable event possibilities.			
3.5.4. Prioritize new ideas for events & activities based on attainability & potential ROI. Identify partners with whom Dufferin can work to make ideas come to life and allocate resources (human, financial) as required/possible.			

3.6.

Align with municipalities to invest in a combined Public Arts Strategy.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
3.6.1. Issue & manage an RFP for a third-party consultancy to develop a Public Arts Strategy for the County; garner buy-in from municipalities.	Y4	New public art displays can be found through Dufferin County, with which visitors are engaging.	\$65,000
3.6.2. Carry-out recommendations of Public Arts Strategy.			TBD
3.6.3. Explore the possibility of establishing a dedicated arts & culture centre.	Y5	Understanding of the feasibility of a dedicated arts & culture centre.	TBD

4.0. Infrastructure Development

4.1. Enhance County-owned tourism assets in an effort to provide holistic and seamless visitor experiences; enlist support from Public Works as needed.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
<p>4.1.1. Develop the visitor experience at Dufferin County Forest - Main Tract, through:</p> <ul style="list-style-type: none"> - Rebuild a "Welcome Stand" for a more refined, professional presence, directed by a clear plan for the use of space prior to breaking ground (how will maps, collateral, announcements, etc. be displayed for effective yet presentable use of space) - Integrate Dufferin County branding to Welcome Stand presence & other Dufferin County signage - Develop comprehensive trail maps for its various uses; cycling, hiking & equestrian - Clearly mark trail openings - Dedicate Public Works resources to maintaining parking lots year-round - Invest in building public restrooms, water stations at Main Tract; dedicate Public Works resources to regular maintenance - Enhance trail markings throughout the forest for more cohesive, on-brand presence - Support volunteers who maintain trails with provision of equipment, financial support or demonstrations of gratitude (i.e. provide lunch, coffee breaks, etc) - Consider parking lot expansion, based on demand with tourism growth <p>Apply enhancements to Little Tract, as needed.</p>	Y1-Y5	Dufferin County Forest boasts a fully-realized tourism experience.	\$15,000 - \$30,000

<p>4.1.2. Develop the visitor experience at the Museum of Dufferin, as follows:</p> <ul style="list-style-type: none"> - Add historical plaques dedicated to local Indigenous histories throughout the grounds - Dedicate space to a permanent Indigenous history exhibit - Train Museum of Dufferin staff on visitors services, to ensure holistic, well-rounded advice and guidance - Ensure a library of collateral (maps, Visitor Guides, itineraries) are on-hand for visitors to take (both in print and accessible online using QR codes) - When booking private events, include conversations about regional experiences to engage clients on a broader level - With one-off events or visiting exhibits, create packages with relevant local stakeholders that help build the narrative or complement the theme of said event/exhibit 	Y2	Enhancements made to grounds and service at the Museum of Dufferin.	\$15,000 - \$20,000
<p>4.1.3. Develop the visitor experience for fishing in local rivers, as follows:</p> <ul style="list-style-type: none"> - With the direction and input from local anglers, identify areas that can be expanded for side-of-the-road parking or small parking lot spaces near public access points to rivers; work with the municipalities where necessary - Mark these parking points with appropriate signage, and ensure information is available online 	Y2 / Y3	Anglers better-able to access river fishing experiences.	TBD
<p>4.1.4. Identify other areas of tourism asset enhancements that might be made possible by the support of Public Works or local municipalities, such as parking nearby top sites, bike racks within small communities, etc.</p>	Ongoing	Well-rounded, positive local interactions available to visitors.	TBD

4.2.

Work with stakeholders & municipalities to strengthen underdeveloped tourism assets in the region, with the goal of creating new experiences.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
4.2.1. Leverage various community touch points (such as the Tourism Advisory Committee as well as ongoing communication with municipalities & stakeholders) to determine points of priority for asset development.	Y2	New tourism experiences added; existing tourism experiences refined with County support.	\$25,000 / annually
4.2.2. Work with relevant stakeholders and / or municipalities to plan & strategize asset development / enhancements, and determine Dufferin's role in supporting these initiatives.			

4.3.

Create a plan for connecting area hiking & cycling trails, both technically wherever possible, and through signage and branding.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
4.3.1. Connect with Ontario Parks and local Conservation authorities to best-understand possibilities (and limitations) to working together on signage and display plans.	Y3	Visitors can identify and appreciate connections between various Dufferin outdoor experiences.	TBD
4.3.2. Based on these possibilities and with the guidance of the TAC, create uniquely-Dufferin experiences throughout area trails. For example, integrate public art displays throughout trails and use augmented reality (AR) technology to add an additional dimension to the experience.			
4.3.3. Map-out County-wide cycling and hiking trails; collaborate with relevant municipal bodies to determine plans and processes for linking existing trails.			

4.4.

In collaboration with Economic Development and Planning functions, conduct an investment attraction assessment, with a particular focus on accommodations potential in Dufferin County.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
4.4.1. Determine potential sites for boutique accommodation; develop SWOT analysis for each.	Y5	Investors express interest in investing in the development of boutique accommodation somewhere in Dufferin County.	n/a
4.4.2. Develop a profile for ideal investors; identify investors who fit said profile & set up meetings. (Consider ownership of other unique accommodation such as The June Motel, Drake Devonshire.)			
4.4.3. Organize site visits for serious prospects, garnering feedback for potential developments.			
4.4.4. Facilitate ongoing communications, as demand dictates.			

5.0. Regional & Environmental Considerations

- 5.1.** Create a Tourism Pledge for visitors & residents, written with an inherent respect for people & the environment at its core.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
5.1.1. Utilize community insights and the Tourism Advisory Committee to draw up 5-8 commitments they would like to see visitors make when visiting Dufferin County. Refine as necessary.	Y2	Pledge is widely distributed & promoted by local stakeholders; visitors sign the Pledge & adhere to its commitments.	\$2,000 - \$3,500
5.1.2. Develop the Tourism Pledge into a document visitors can access on all Dufferin digital channels, and while visiting key stakeholders (accommodations, Museum, Visitors Centre, Theatre Orangeville, etc); include a spot where visitors can sign.			
5.1.3. Leverage the Tourism Pledge as a brand awareness tool for the destination, encouraging visitors to use social media as a place to share their pledge and demonstrate their adherence to the Pledge throughout their visit.			

- 5.2.** Update and continue to carry-out the existing wayfinding plan to link tourism experiences and capture the attention of visitors upon arrival to the region, further positioning Dufferin County as a destination with a distinct identity and sense of place.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
5.2.1. Determine areas in which the existing wayfinding plan should be updated based on recommendations within the Tourism Strategy & Action Plan.	Y2	New, illustrative, clear signage throughout the County to direct visitors and entice passers by.	TBD
5.2.2. Continue to carry-out recommendations of wayfinding strategy.			

- 5.3.** Prioritize ongoing management and protection of tourism assets to mitigate overtourism, protect natural assets and ensure positive visitor experiences.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
5.3.1. Task the Tourism Manager with the monitoring and management of tourism assets, to ensure sustainable growth and proactive problem solving as needed.	Ongoing	There is ongoing oversight of regional assets.	n/a
5.3.2. Establish connections with relevant conservation authorities and Ontario Parks; explore best approach to communication & collaboration.			

6.0. Brand & Marketing

6.1.

Round-out the current inDufferin brand by creating a Brand Guide to define key elements of brand and location identity.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
6.1.1. Building upon the current "inDufferin" brand, adopt "Dufferin" as the recognizable destination identity with which to reference Dufferin County in tourism materials.	Y1, Q1 Ongoing	New Brand Guidelines developed & accepted by the County.	\$5,000
6.1.2. Enlist the services of a third-party consultant to develop a Brand Guide and Brand Implementation Toolkit, outlining internal and external brand applications.		Brand Guidelines understood and adopted by Dufferin municipalities, stakeholders & partners.	
6.1.3. Use various channels (virtual presentation, social media, newsletters, etc.) to introduce the new brand to Town Council, stakeholders, Dufferin County, RTO6 and the community, to ensure all involved are aware of Dufferin's new tourism brand voice.		New Brand Guidelines implemented by Dufferin, its municipalities, stakeholders & partners.	
6.1.4. Integrate new branding across tourism infrastructure, including: social media pages, tourism webpages, marketing & promotional materials, wayfinding, signage, social media, website, etc.			
6.1.5. Work with tourism stakeholders to roll-out a cross-Dufferin brand initiative, to ensure the "inDufferin" brand is utilized consistently throughout the region — in person (via signage, decals) and online (logos on website, links to Tourism inDufferin webpage).			

6.2.

Develop interactive tourism collateral that directly appeals to target markets & diverse audiences, and showcases the broad appeal of the region; make Dufferin resources a one-stop shop for visitor planning.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
<p>6.2.1. Determine priorities, and allocate resources, to developing the following assets:</p> <ul style="list-style-type: none"> - Photos & videos: Ensure a library of diverse visitors experiencing the Region & its assets, to be incorporated within all other tourism collateral. - Visitors Guide: Use a content-informed approach (show, don't tell) to adequately showcase the region's tourism assets, communities, people, etc. - Blogs: Develop editorial calendar for content creation based on local activities & events, monthly themes, etc. - Maps: Hiking, cycling, driving routes, themed experiences, equestrian trails, ATV trails, etc.; include recommended routes. - Guidebooks & pamphlets: Provide background information on various sites and experiences as to offer background understanding for visitors during their planning phase and visit to the destination. - Itineraries: Enhance already existing itineraries, and apply a similar format to all new itineraries going forward. Utilize an approach that more actively describes tourism assets, and illustrates the experience for prospective visitors. Refer to this link for a recommended structure. 	<p>Y1, Q3 Ongoing</p>	<p>A complete library of tourism materials are available to guide & inform visitors before or during their stay.</p>	<p>\$20,000 - \$30,000</p>
<p>6.2.2. Commission the services of a graphic designer to create materials.</p>	<p>Y1, Q4</p>		
<p>6.2.3. Make maps, itineraries, brochures and guides available in print and web format; ensure web formats are mobile responsive and also available for download in PDF form.</p>	<p>Ongoing</p>		
<p>6.2.4. Review collateral annually and update it annually as needed, to remain relevant & accurate.</p>	<p>Ongoing</p>		
<p>6.2.5. Expand itinerary library as new public art, annual events and activities, and tours are added to Dufferin's portfolio of tourism assets.</p>	<p>Ongoing</p>		

6.3. Build an annual Tourism Marketing Plan, including media relations, content creation, social media promotions, contesting, community engagement & paid advertising (if possible), to enhance the awareness of and engagement with Dufferin as a destination.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
6.3.1. Align tourism marketing initiatives & product promotion amongst all County assets, notably the Museum of Dufferin.	Y1, Q3/4	Marketing activities, both paid & earned, are continuously carried out to promote awareness of Dufferin as a destination and interaction with its tourism assets.	TBD
6.3.2. Map-out a marketing plan that can be adapted annually, or as needed, to plan promotional activities based on Dufferin calendar of events, thematic routes, etc; include elements such as an editorial calendar (blog & newsletter content), social media calendar, budget, advertising channels, co-op marketing partners and media & influencer opportunities.	Y1, Q3/4 (for Y2) + annually		
6.3.3. Determine potential to maximize ROI in promoting events and local tourism assets, and decide appropriate marketing channels for each (print, web, radio, social media). Consider social media marketing as primary targeted approach.			
6.3.4. Identify stakeholders and partners, within Dufferin and beyond, with whom to work in carrying out various elements of the marketing plan. Simple criteria for potential co-op marketing partners include stakeholders: who have funds available, whose values align with Dufferin's, and who will directly benefit from marketing initiatives.			
6.3.5. Utilizing the editorial calendar within the marketing plan to guide efforts, create a robust bank of content (written, video and photo content), and establish a Blog section on the Tourism website.			
6.3.6. Further enhancing brand presence and destination awareness, utilize platforms such as TripAdvisor to share content & engage with prospective visitors.			

6.4.

Create a tourism website strategy based upon new brand principles & acquire a dedicated tourism URL, with the intent to launch a stand-alone portal.

ACTION ITEM	TIMELINE	GOALS / KPIS	BUDGET
6.4.1. Enhance the current Tourism inDufferin web strategy to offer a more refined visitor experience and to: more actively showcase local tourism experiences; to include an Events Calendar; to include blog & video content; and to showcase tourism collateral, with a particular focus on itineraries.	Y1, Q1	Enhanced online content available to showcase and promote Dufferin product to prospective visitors.	\$60,000 - \$80,000
6.4.2. Create a site map for a dedicated tourism website, to exist separately from the County's main web presence. Build the site (using third-party services, if needed), and launch it using tourismindufferin.ca as the URL.	Y3	Engaging, content-rich website with a unique appearance from other County pages, dedicated to tourism promotion.	

Appendix A

Comparable analysis

Introduction

This competitive analysis supports the Dufferin County Destination Development Strategy. Findings and recommendations outlined in this document will be incorporated in the overall strategy. To complete the competitive analysis, our team reviewed the strategies and performance of four relevant destinations:

- Perth County (ON)
- Peterborough & the Kawarthas (ON)
- Norfolk County (ON)
- Huron County (ON)

Tourists in Ontario don't struggle for choice in finding a destination that offers them incredible locally-grown culinary options, access to exceptional arts, culture and heritage, and a bucolic, natural landscape just a short jaunt from Toronto — all central tenets of the Dufferin County tourism offering and appeal.

That is why it is crucial that Dufferin County has a more comprehensive appreciation for competing regions within Ontario as we work to establish a sustainably-minded tourism strategy. A more thorough understanding of the paths already charted by similar regions and an examination of their respective successes and struggles will provide a considered base on which to build a thoughtful and distinctive strategy.

Following, we pull out a few key lessons and place recommendations in the context of the experiences and strategies of analogous destinations. A detailed table of findings, statistics and documents sourced can be [accessed here](#).

Leveraging Natural Resources

Positioning outdoor spaces and agri-tourism industries as a key demand generator is a logical move for many Ontario destinations. It's a popular choice for rural counties in particular — which are agrarian by nature — as the trappings of pastoral, rural living is often synonymous with a relaxing escape for many target tourist markets.

Dufferin County's proximity to the GTA, supportive business community and customer base, and rich agriculture landscape makes it well-suited for this very approach. But this form of destination development goes beyond having access to acres of forest and field-to-table offerings. To marry agriculture or conservation with tourism, developers must remove or alleviate operational barriers and lay the groundwork to ensure all concerned parties have the tools in place to succeed. Often, training local business owners in tourism practices is required, as is encouraging synergies and partnerships among local organizations. From there, programming must be created — and then effectively promoted — to complement stakeholder offerings while attracting visitors.

Ontario regions that have successfully capitalized on their natural landscapes — not only as a base for brand identity and programming but as a way to improve the quality of life for residents and communities — have done so only through workforce collaboration, long-term strategy implementation, and dynamic, targeted promotions.

Perth County is one example of how a well-balanced strategy can lead to well-rounded success. In an effort to build on the popularity of its main draw, the City of Stratford, Perth County has most recently encouraged visitors to "Discover More" beyond Stratford by promoting its natural resources. In 2019, it invested in The Canadian Experiences Fund (CEF), a grant-based program that helps Canada's tourism sector innovate and grow by providing targeted investments based on regional priorities. Staff provided experience development training to regional tourism-oriented businesses to create memorable rural tourism activities, enhance product, improve service planning and elevate visitor experience implementation. Perth also set about raising awareness of its offerings by way of a "Hike and Bike Map" in 2018, a "FarmGate Map" in 2019 (designed to help visitors and locals access the fresh, local food available), and now has plans to launch an agri-tourism mapping project and toolkit for 2020.

Given that Food for Thought, Dufferin County's report on the agriculture and food sector, found that 57% of survey respondents engage in farm retail or farm gate sales and 74% indicated there are barriers expanding said sales, a "FarmGate" map or agri-tourism marketing campaign may be a direction to take in future.

Norfolk County has consistently taken a more ground-up approach to building its "Ontario's Garden" identity by prioritizing workforce engagement, funding and collaboration. In 2018, staff visited approximately 300 businesses in the agriculture, manufacturing and tourism industries, with the intention of assisting businesses, identifying challenges and subsequently, possible solutions. In 2019, 12 projects in downtown Simcoe were funded with incentives for non-residential property owners via a one-time only Urban Renewal Partnership of \$24,000 and an ongoing Community Improvement Plan tax levy incentives budget of \$95,000 funded eight projects.

Norfolk County staff also hosted the 12th annual Economic Development Symposium in 2019, which welcomed 258 registrations to attend (up from 200 in 2018), and last year also worked on the "Guide for Starting and Operating an Alternative Accommodations Business" project in collaboration with Haldimand and Eglin Counties and the Southwest Ontario Tourism Corporation. These efforts, while markedly centered on community economic development, specifically underscore its 2019 tourism goals, which include increasing tourism infrastructure,

putting greater effort on product development and incorporating agricultural initiatives.

When it comes to harnessing its natural resources, Huron County, arguably more established in its identity as an agri-tourism destination, committed to more product development and promotion ahead in its 2020-2023 tourism strategy, with intention to develop an “Experiential Trails” campaign featuring an interactive, digital map outlining discovery trails for the visitor to explore. It also plans to introduce wayfinding signage to guide visitors around the region, and published a vacation guide promoting all attractions and services available within the County - which stakeholders later confirmed resulted in direct sales.

Finally, Peterborough & the Kawarthas (PK) demonstrates how creative product development can serve to elevate natural resources — once workforce and community cohesion, destination identity and visitor awareness is well-established. In 2018, the region curated paddling routes connecting the region’s canoe culture to the Trent-Severn Waterway. It also promoted its local craft beer industry through a “Brews, Bites and Barns Brewery Discovery Route” — a hand-picked itinerary of the region’s unique attractions. Finally, it blended the beauty of PK’s lock system and natural waterways with the allure of an exclusive culinary experience with its award-winning “Under Water Dining at Lock 21” experience.

While PK is at a point where its natural resources are synonymous with its reputation as a destination, its Economic Development team also recognizes the importance of encouraging ongoing collaborations to ensure future asset relevance. In 2018, it hosted a Rural Business Summit, bringing together business owners, experts and community leaders to discuss challenges being faced by rural businesses. As well, its 2018 Business Plan outlines the objective to improve investment readiness, including a “Communities in Transition” project, designed to equip the community for future changes to the local industry.

Considerations:

- Conduct an analysis of available natural resources and agricultural assets, and determine which are ready to receive visitors and which require additional development
- Prioritize developing a rural business symposium to address the ongoing actions resulting from the 2020 “Food for Thought” report and encourage cross-collaboration of agricultural businesses
- Engage in provincial and federal funding incentives designed to assist business product development
- Consider available programs (i.e. The Canadian Experiences Fund) and offer tourism training programs to prepare rural business owners for managing and meeting visitor experience expectations
- Determine which assets can be packaged and promoted immediately to potential visitors
- Engage in creative product development around available assets

The Power of Partnerships

In today’s economy, all manner of collaboration and partnerships are often essential to most County tourism strategies, as they allow regions to combine and share available resources to elevate assets, capitalize on campaigns, and acquire additional funding, ultimately strengthening a destination’s tourism offerings. Opportunities offered through inter-municipal and inter-regional associations can include workforce training programs, cross-industry experience package and event development, and broader promotional opportunities via cost-sharing.

There are a number of ways to take advantage of such opportunities, and Dufferin County's approach should be informed by its own strengths and challenges — i.e., not only what it stands to gain from collaboration, but what it can bring to the table, as well.

Perth County capitalizes on its own assets, namely Stratford, which enjoys its own reputation as an iconic Canadian cultural destination. As of 2018, Perth County entered a partnership with Stratford Tourism Alliance, which has resulted in inclusion in Stratford's Fall Road Trips blog series. Its 2020 strategy indicated Perth would continue the partnership in an effort to encourage Stratford tourists to go beyond the city and "Discover More" of Perth County. Looking further afield, Perth County also partnered with the University of Waterloo's Tourism program, whereby students developed seven thematic "Plan Your Trip" online tourism itineraries in 2019.

Norfolk County has been adept at positioning its own assets as a value-add to larger entities. Having recognized its popularity among motorcycle road-trippers, the county partnered with the Ontario South Coast Tourism Alliance in 2019 on "Cruise the Coast," a project targeting motorcyclists at trade shows. Staff also worked with the Ontario South Coast Wineries & Growers Association to promote the area's wine and craft brewing industry, leveraging the Association's organizational and promotional resources for broader reach in exchange for portfolio growth. As mentioned above, Norfolk County staff also contributed to the "Guide for Starting and Operating an Alternative Accommodations Business" in cooperation with peers in Halidmand County, Elgin County and the Southwest Ontario Tourism Group. The guide, which will offer comprehensive insights derived from a variety of regions and business owners, will be released in 2020.

Partnerships can also be more than a way to share resources — when harnessed correctly, they can dig deep beneath the skin of a destination and ignite a sense of pride and connection among visitors and residents, which in turn, increases its attractiveness to outside visitors. After all, the best destinations in the world are also excellent places to live.

Huron County accomplishes this by facilitating networking events, such as its annual Tourism Symposium, which encourages small businesses synergies via face-to-face engagement, as well as Tourism Day and Brochure Swap, a former event that attracted 100 registrants as of 2014. Huron County also excels at finding promotional opportunities where parallels exist between local cultural, natural and experiential groups and its tourism offerings. More recently, its 2020-2030 strategy outlines plans to develop and build on existing partnerships with groups such as Ontario by Bike, Taste of Huron, Explore Beyond the Shore, Maitland Trail Association, Culinary Tourism Alliance and G2G Rail Trail. Such efforts not only capitalizes on these groups' resources to the benefit of Huron's tourism — it also validates their own central mandates of encouraging community exploration.

Peterborough & the Kawarthas (PK) achieves a sense of ownership among its residents by collaborating directly with them. In an attempt to appeal to visiting friends and relatives in 2019, PK increased digital interactions and engagement on social media, encouraging residents to be ambassadors for the region by showcasing their own experiences with local attractions, restaurants and activities. Via its tourism website, thekawarthas.ca, visitors and locals can create their own itinerary through a trip planner tool, and have direct connections to tourism partners. Users can also access a live chat feature as well as a mobile visitor services program that includes over 30 pop-up locations throughout the city and county of Peterborough.

Considerations:

- Align Dufferin County's strengths as a destination with those of Orangeville, and determine ways in which the two can complement and build on each other's offerings
- Work with post-secondary tourism programs to design creative experiences and build out Dufferin County's product portfolio

- Identify niche markets and target them by cooperating with membership groups on promotions and events
- Work with neighbouring counties to collaborate on creative professional development opportunities in broad-reaching sectors such as accommodation and touring.
- Create annual County-wide networking events where businesses can exchange ideas, opportunities and resources
- Hold community engagement discussions to determine points of pride within Dufferin County
- Form Ambassadorship campaigns incentivising residents to promote their favourite experiences around Dufferin County via social media
- Identify special interest groups with parallels in the Dufferin County visitor experience (e.g. cycling, hiking) and partner with them to create and promote new activities and events

Finding an Identity

A sense of identity is essential to a destination's ability to capitalize on its strengths and appeal to the public. A clear understanding and implementation of its own character allows a destination to instill a pride of place among its residents and business owners, which in turn fuels the sort of storytelling and engagement that entices visitors to explore a place for themselves. Destinations that are able to effectively tell their own story have historically done so by developing distinct and verifiable tourism brands that spring from understanding their greatest assets, and a good destination identity is one which resonates with long-time locals, new residents and visitors in equal measure.

Huron County, embracing its reputation as one of the most thriving agricultural regions in Ontario, places a strong emphasis on cross-promotion of community events — particularly those which align with that identity such as music festivals, municipal fairs, the Barn Dance Jamboree and Campout Weekend and Ciderfest. One example is the annual Taste of Huron Culinary Event, which began in 2010 and attracts approximately 1500 participants (40% locals and 60% visitors) from Ontario and the US each year. The Alice Munro Festival of the Short Story, which celebrates local Nobel Prize winner Alice Munro, is another event that appeals to a broader audience due to the notoriety of the Nobel Prize. By investing time and resources in these local attractions to make them tourism draws as well, Huron County is able to consistently uphold its identity as a pastoral retreat while bolstering the efforts of its stakeholders and communities.

Norfolk County is another destination that not only recognizes the importance of consistent, creative promotional work, but also that an identity should evolve over time. In 2019, as part of its ongoing work to amplify its identity as an agri-culinary destination, Norfolk attended the Culinary Tourism Alliance Terroir Symposium in Toronto, positioning itself as well as its community of farmers, vitners, brewers and restaurateurs front and centre as the premier destination for foodies. Nearly 950 hospitality and food influencers and professionals attended to discuss the latest industry trends, and Norfolk's presence boosted its image into a new sphere of culinary appreciation. On the homefront in 2019, staff created "Passionate Folks of Norfolk," a promotional video focused on citizens who are passionate about supporting their community in Norfolk County, effectively instilling pride of place among residents while extolling the virtues of the destination across social media.

Peterborough & the Kawarthas (PK), which has enjoyed an increasingly well-established identity as a home to cultural heritage and cottagers over the years, endeavours to keep that brand

strong by connecting with residents and media in equal measure. It has continued work on its Ambassador Program, which shared business success stories and worked to partner with local and Canadian influencers, and created a “Pride of Place” marketing initiative to further collaborate with residents on their favourite aspects of living in PK. Its 2018 Business Plan committed to raising awareness of PK among visitors and residents alike, which it managed via masterful external media engagement: in 2019, PK hosted 14 travel media — including a group of influencers from the Toronto Bloggers Collective — and secured coverage in major publications such as the National Post, Food & Drink Magazine, West Jet Magazine, National Geographic, Ignite Magazine, Canadian Cycling Magazine and the Weather Network morning show.

Not only is a dynamic, unique and authentic identity crucial to effectively appealing to potential visitors, it can also galvanize the community pride and engagement of its residents, which pays dividends when it comes to evolving that identity over time.

Perth County is one region that is lacking in a clearcut identity, perhaps due to its positioning of itself as an afterthought to the Stratford experience. While using a popular draw as a springboard for destination growth can be a great way to build interest, it should not be employed as a substitute for exploring and embracing a county’s own singular identity. Rather, any partnering identities should complement and serve to build on one another, so that the potential for storytelling and experience-building continues to be dynamic and evolve at every opportunity.

Considerations:

- Launch campaign to engage with Dufferin County residents and business owners in helping to build its brand by sharing what Dufferin County means to them. Use feedback to inform brand identity encompassing Dufferin County’s greatest assets
- Determine Dufferin County’s top defining experience (e.g. agri-culinary, nature trails, etc.)
- Use new brand to develop buy-in from local stakeholders and drive tourism advocacy efforts in the region
- Create a collection of experiences that highlight the essence of Dufferin County (the brand) for the uninitiated and introduce additional tourism products to those who feel they already “know” the destination
- Determine how Dufferin County’s identity and story proposition can complement that of Orangeville.
- Create a media engagement strategy to promote defining experiences and brand development

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