



Township of Oro-Medonte

Tourism Product Gap Analysis & Policy Recommendations

October 14, 2021

INTRODUCTIONS – CBRE TEAM

CBRE

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AGENDA

- 1** **Tourism Market Overview**
- 2** **Destination Sentiment**
- 3** **Tourism Gap Analysis & Opportunities**
- 4** **Municipal Support, Challenges, & Policy Review**
- 5** **Next Steps**

STAKEHOLDER ENGAGEMENT

Municipal/Other Government

- Oro-Medonte Parks & Recreation
- Oro-Medonte Economic Development
- Oro-Medonte Planning
- City of Orillia Tourism
- City of Barrie
- Orillia Community Development Corp.

Tourism Organizations

- Ministry of Tourism
- Regional Tourism Organization 7
- Lake Country
- Tourism Simcoe County
- Oro-Medonte Chamber of Commerce & Tourism
- Tourism Barrie

Tourism Businesses

- Accommodation (5)
- Winery, Cidery, Breweries, Agri-Tourism (6)
- Event Venues (3)
- Ski Hills/Snowshoeing/Cross-country Skiing (3)
- Outdoor Recreation (6)
- Arts & Culture (2)

36 Stakeholders in Total



TOURISM MARKET OVERVIEW

Line 9 S.

ORO-MEDONTE'S TOURISM MARKET

1-Hour Population Market: 580,000

- Projected to grow 7.9% by 2026
- Median age 42

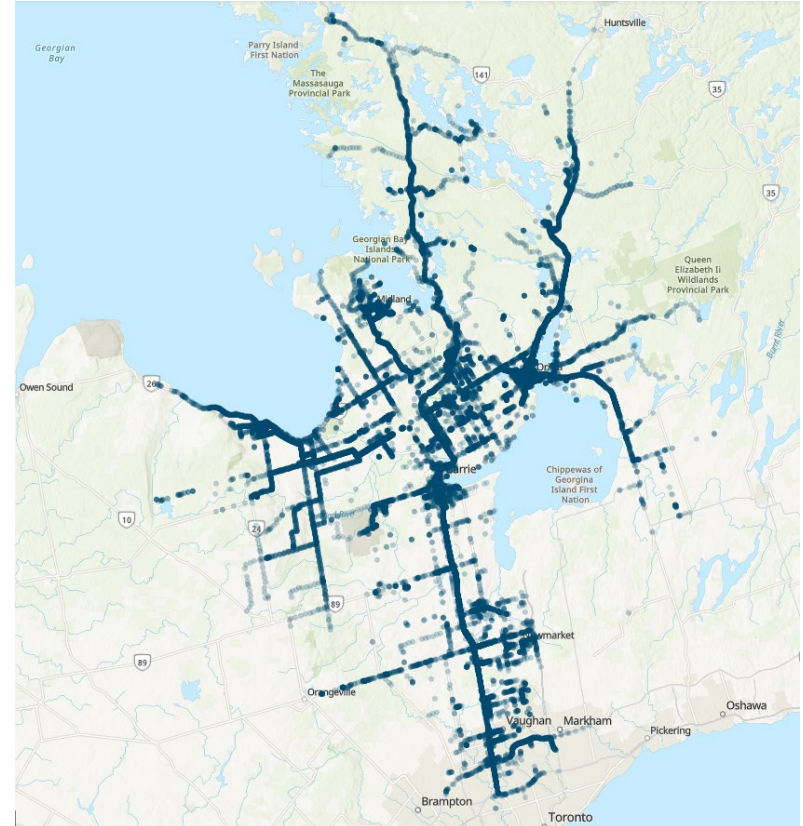
2-Hour Population Market: 8.3 Million

- Projected to grow 6.5% by 2026
- Median age 40

Key Tourism Markets

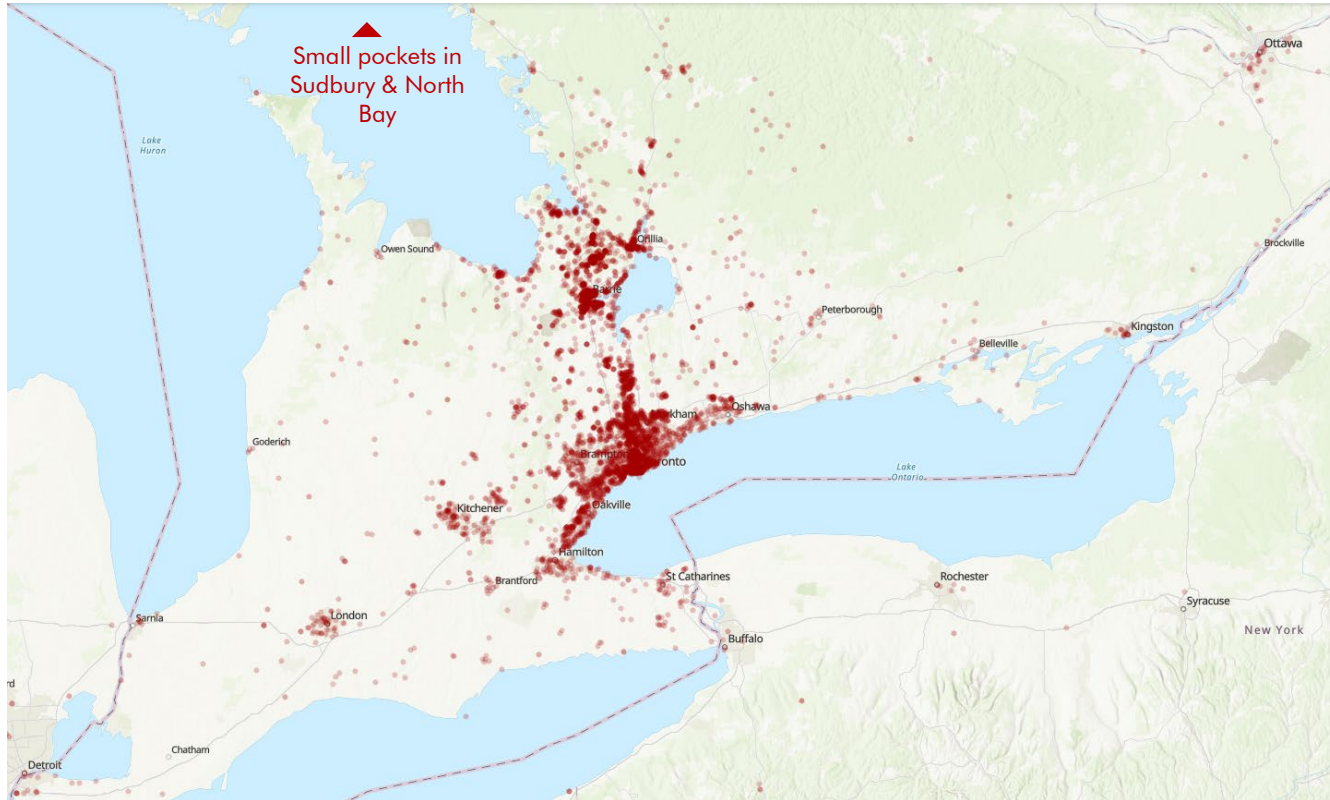
- Families, nuclear & multi-generational
- Couples
- Single travelers
- New Canadians

1-Hr Path to Purchase



Sources: Esri, Airbus DS, USGS, NGA, NASA, CGIAR, N Robinson, NCEAS, NLS, OS, NMA, Geodastystyrelsen, Rijkswaterstaat, GSA, Geoland, FEMA, Intermap and the GIS user community,
Sources: Esri, HERE, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community

ORO-MEDONTE VISITOR ORIGIN

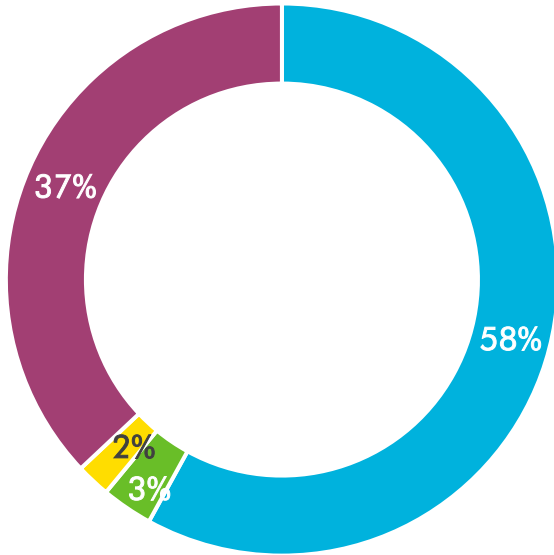


Visitor Origin	
Ontario	93%
Southern Ontario	90%
Other Provinces	2%
USA	4%
International	1%

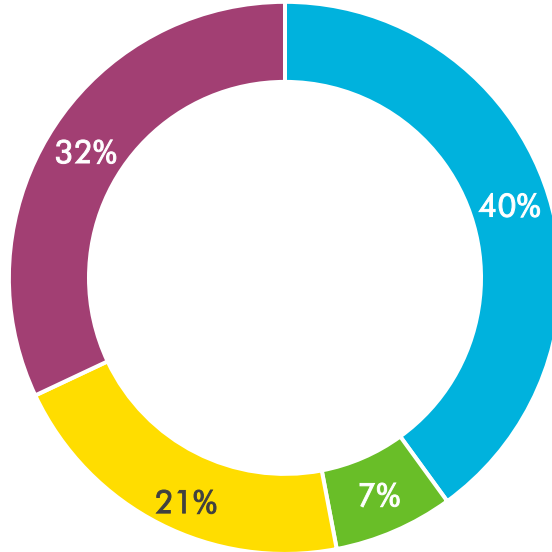
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VISITATION SEASONALITY

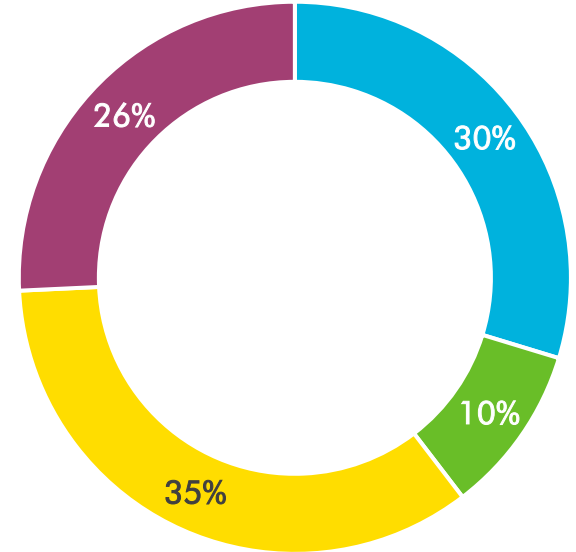
Mount St. Louis Moonstone



Horseshoe Resort



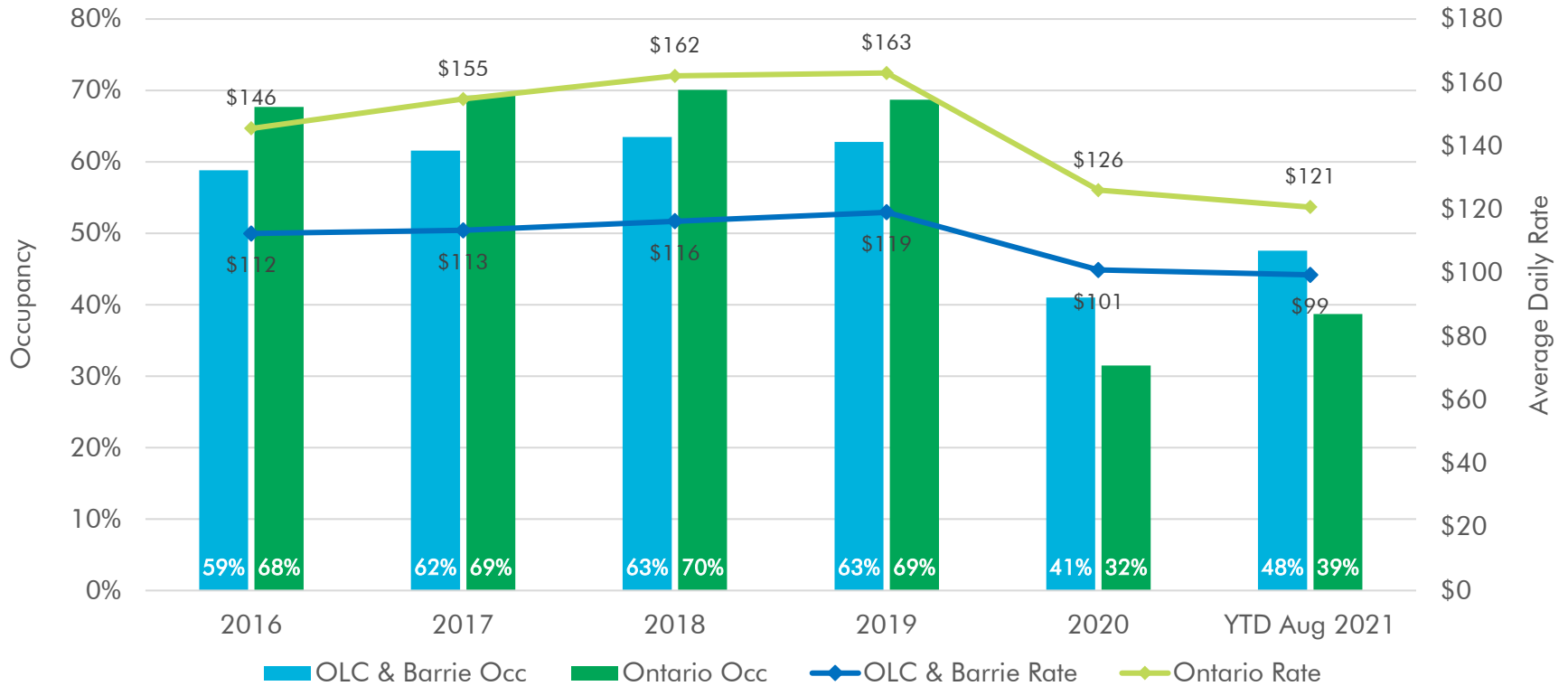
Hardwood Ski & Bike



■ Winter ■ Spring ■ Summer ■ Fall

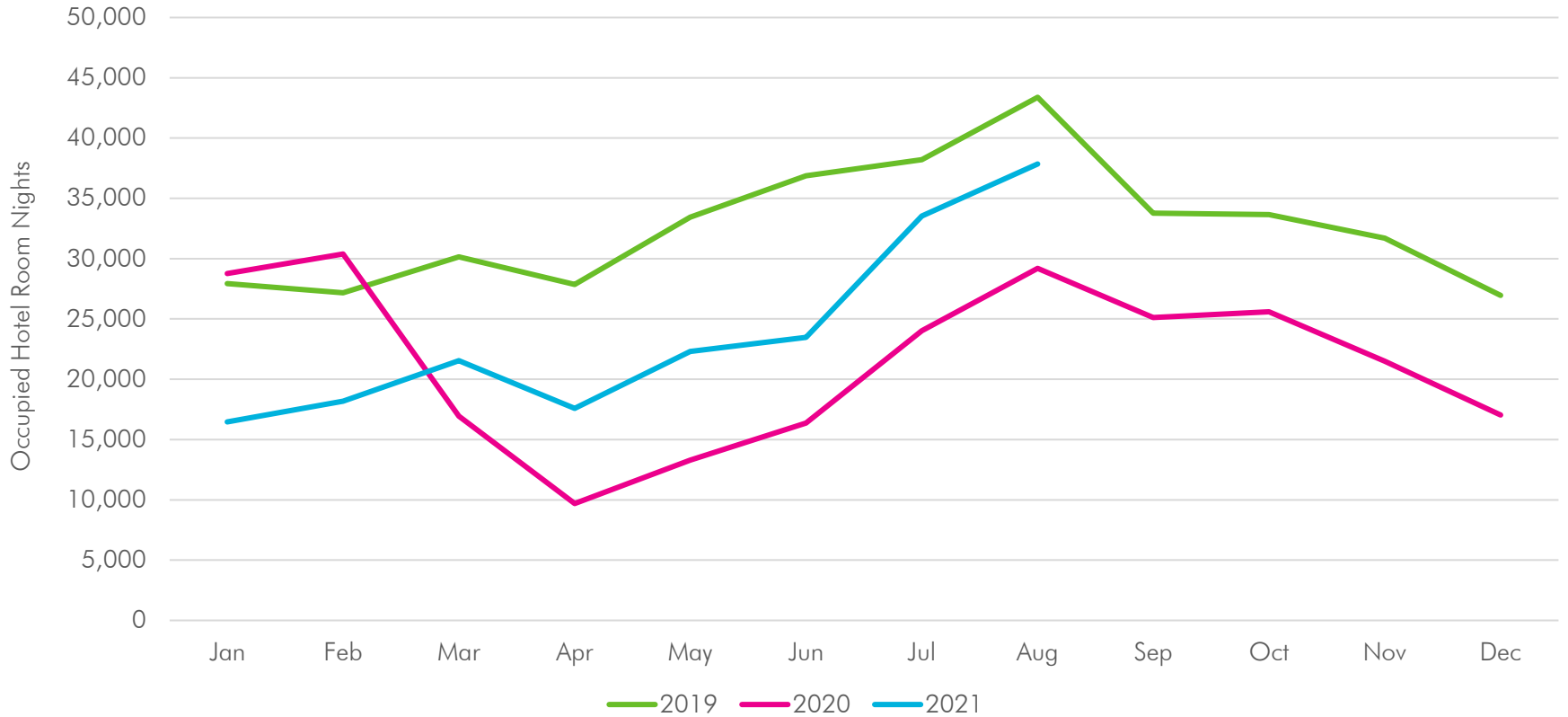
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ORILLIA & LAKE COUNTRY* + BARRIE VS. ONTARIO HOTEL MARKET



*Orillia & Lake Country includes participating hotels in Orillia, Oro-Medonte, Severn, Ramara
 Source: CBRE Hotels – Trends in the Hotel Industry

ORILLIA & LAKE COUNTRY* + BARRIE OVERNIGHT ACCOMMODATION DEMAND



*Orillia & Lake Country includes participating hotels in Orillia, Oro-Medonte, Severn, Ramara

Source: CBRE Hotels – Trends in the Hotel Industry



DESTINATION SENTIMENT

STRENGTHS OF DOING BUSINESS IN ORO-MEDONTE

Four Season Outdoor Adventure Playground

- Ideal location between Barrie & Orillia, location close to GTA and on the way to cottage country (Muskoka, Georgian Bay islands)
- Outdoor adventure –skiing, biking, paddling & more
- Significant natural assets – forests, trails, lakes & rivers
- Agriculture & agri-tourism
- Events – weddings, outdoor, music
- Unique tourism experience assets



CHALLENGES OF DOING BUSINESS IN ORO-MEDONTE

Business In General

- Access to capital & debt relief
- Cost of land extremely high
- Access to labour
- Lack of adequate public transportation

Regulatory Agencies Interactions

- Limited by policies & legislation
- Obtaining permits (building, special events)
- Taxes, development charges, and additional charges on new businesses & developments



CHALLENGES OF DOING BUSINESS IN ORO-MEDONTE

Township Interactions

- Affordable design/planning approval process
- Too many points of contact, operators/investors unsure of which department/organization to connect with
- Lack of education on municipal supports available
- Large & small businesses not treated equally
- NIMBY-ism
- Zoning bylaw amendment process
- Taxes, development charges, and additional charges on new businesses
- New developers need to “pave the way” with OM Township, more challenging compared to other municipalities
- Outside of Economic Development, overall sentiment that Township is not supportive of tourism in Oro-Medonte

EXISTING PLANS FOR EXPANDING/NEW TOURISM IN ORO-MEDONTE

- Vetta Spa opening
- Glen Oro Eco Retreat expansion
- Oro Station Automotive Innovation Park
- New ownership at Carriage Ridge & Carriage Hills
- New ownership at Horseshoe Resort
- Winery & Cidery businesses
- Farm-fresh culinary school and catering concept
- Destination Spa
- Lake Simcoe Regional Airport expansion



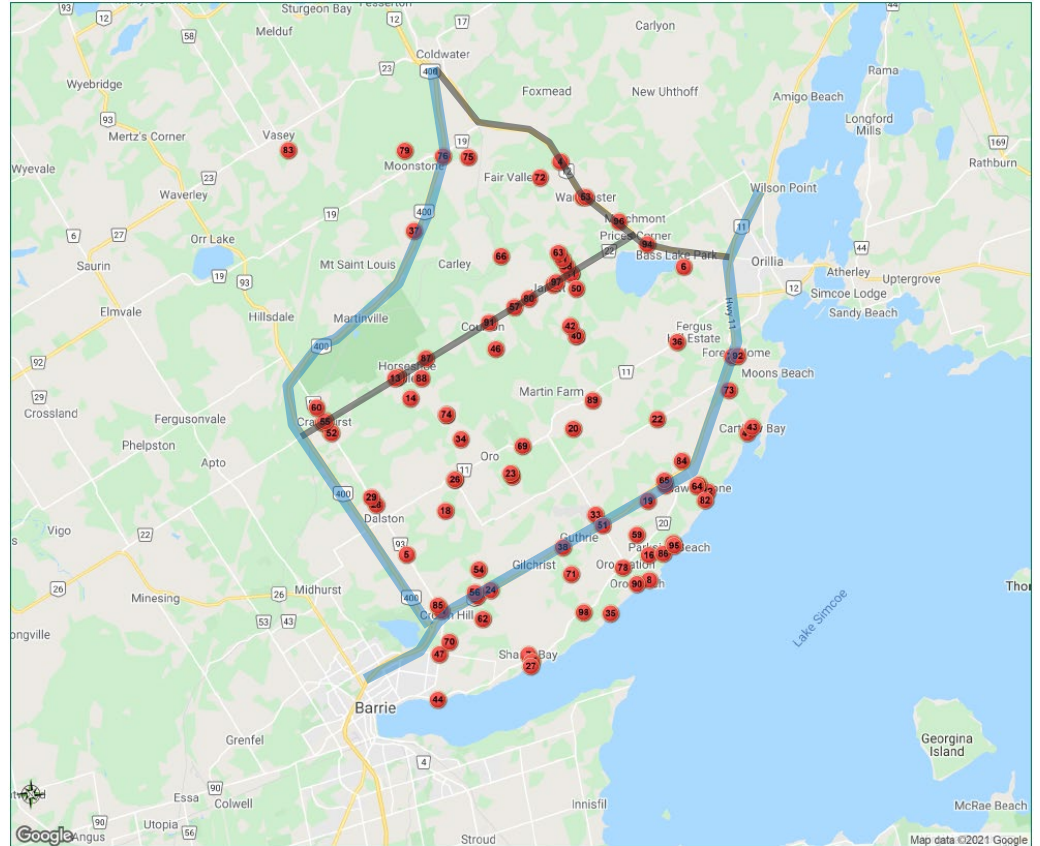


Chappell
Farms

TOURISM GAP ANALYSIS & OPPORTUNITIES

CURRENT TOURISM ASSETS

Asset Type	% by # of Assets
Agri Eco Tourism	23%
Nature	19%
Retail	11%
Adventure & Outdoor Activities	11%
Accommodations	10%
Restaurants & Bars	8%
Arts & Culture	8%
Water	5%
Event Facility	3%
Organized Programming	2%
Spa Wellness	1%



TOURISM GAP ANALYSIS



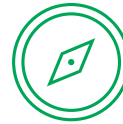
Strengths

- Outdoor recreation
- Agriculture
- Very unique assets
- Natural landscape
- Ideal location



Gaps

- Restaurants
- Range of accommodation
- Large Indoor Event Venue
- Ancillary businesses
- Public waterfront access
- Support Infrastructure (parking, washrooms)
- Unifying Strategy (wayfinding, signage, marketing)



Market-Match

- Affluent suburban & urban couples
- Young & multi-generational families
- Outdoor recreational market
- Extreme sports market
- Event attendees
- Visiting Friends & Relatives
- Future residents

WE WANT TO HEAR FROM YOU

What do you think is the #1 investment opportunity for tourism in Oro-Medonte?

Mentimeter



LONG LIST OF PRIVATE SECTOR TOURISM OPPORTUNITIES

- Hotel/Inn
- Restaurant
- Boat/kayak/SUP rentals
- Marina
- Shuttles/taxi service
- Glamping
- Short-Term Accommodations
- Tour company & guide service – cycling, fishing, guided walking
- Commercial hub assets
- Art Gallery/Studio
- Destination Spa
- On-trail services (F&B, washrooms, repair station)
- Pop-up food & beverage operator/food-truck
- Indoor event space (incl. business, group, social/banquet space, etc.)
- Agri-tourism (on-farm diversified use)



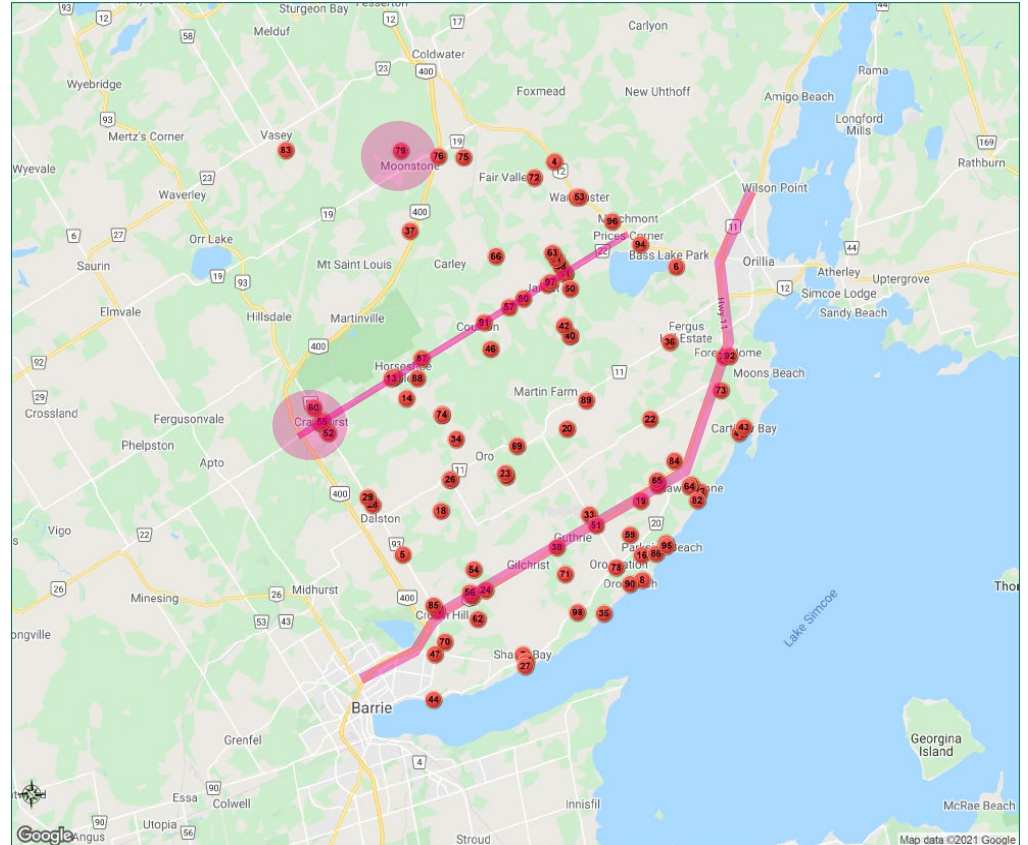
LIST OF PUBLIC SECTOR TOURISM OPPORTUNITIES

- Support infrastructure (parking, washrooms, bike lanes, forest maintenance) to enjoy natural assets
- Water access infrastructure (beach, boat launch)
- Transportation
- Economic development in small villages (commercial hub support)
- Unifying tourism identity & marketing
 - Wayfinding & signage (both roads & trails)
 - First impression of OM (“Gasoline alley” or a tree-corridor)
- Improved internet connectivity
- Promote OM as a place to live, work, play



FUTURE TOURISM OPPORTUNITY LOCATION CONSIDERATIONS

- Activate Highway 11
- On Horseshoe Valley Road
- Craighurst Development
- Surrounding Mount St. Louis Moonstone
- Waterfront development
 - Lake Simcoe...



A photograph of two cyclists riding through a dense forest. The cyclist on the left is wearing a light blue jacket and a white helmet. The cyclist on the right is wearing a red jacket and a white helmet. They are both wearing sunglasses and riding on a paved path. The background is filled with tall, thin trees and lush green foliage.

MUNICIPAL SUPPORT, CHALLENGES & POLICY REVIEW



2018-2022 ECONOMIC DEVELOPMENT STRATEGY

Strategic Priorities

1. Champion improved access to key infrastructure such as **internet and natural gas**
2. Address **existing barriers** to residential, commercial, and industrial development
3. Develop and promote Oro-Medonte as a premier **four-season tourism destination**
4. Provide a **supportive environment for entrepreneurs** to start, maintain and grow a business



OVERVIEW OF CURRENT PLANNING & POLICY FRAMEWORK

Township of Oro-Medonte Official Plan (2020 Consolidation)

Opportunities

- Diversification of the tourism industry and existing recreational uses are identified as strategic objectives in the OP
- Several land use designations/policy areas encourage development related to recreational/tourism uses (e.g., *Mount St. Louis/Moonstone*)
- Objectives and policies for lands designated *Agricultural* and *Rural* generally support expansion of tourism opportunities and associated activities
- Option to adopt policy to designate a Community Improvement Project Area (CIP)

Challenges

- New tourist commercial and recreational uses in the *Agricultural* designation is not contemplated
- Specific policies not currently provided for some opportunities (e.g., 'on-farm diversified uses')

OVERVIEW OF CURRENT PLANNING & POLICY FRAMEWORK

Township of Oro-Medonte Zoning By-law (2021 Consolidation)

Opportunities

- 'Agri-tourism Uses' and 'On-farm Diversified Uses' defined in the Zoning By-law based on exceptions established by Glen Oro Farm

Challenges

- Areas that permit accessory outdoor display and sales of materials may be limiting
- Lack of clear permissions and standards for location of certain uses and opportunities

BEST PRACTICE CATEGORIES

Exploring best practices based on feedback from the Township

Three broad categories capture best practice research:

1. On-Farm Diversified Uses
2. Pop-Ups/Temporary Uses
3. Recreational, Temporary and Seasonal Accommodations



BEST PRACTICE EXAMPLES

On-Farm Diversified Uses – Policy Supporting Implementation Example: The Brighthouse Farm, Prince Edward County

Description

- Landowners are currently seeking approval to develop on-farm diversified uses to complement existing farming and accommodations
- Additional uses proposed include pick-your-own bouquets, gardening workshops, farm-to-table baskets, expanded venue and accommodation spaces, etc.

Planning/Policy Context

- Lands designated 'Rural' in the Prince Edward County Official Plan and are zoned the Rural 3 (RU3) Zone and Environmental Protection - Provincially Significant Wetlands (EP-W) Zone
- Through the approval of an OPA, the proposed development will redesignate and rezone the site to permit on-farm diversified uses



BEST PRACTICE EXAMPLES

Pop-Ups– Policy supporting implementation

Example: Pop-Ups on the Bay, City of Belleville

Description

- Temporary pop-up initiative by the City to enhance recreational and economic activity on the waterfront
- 13 vendors providing activities, food, and goods in West Zwick Park on select dates from June – September .

Planning/Policy Context

- Alignment with Strategic Plan supported project initiation and success
- Specific By-law approved to authorize the Waterfront Pop-up agreement
- Analysis after three (3) years of operation suggest that a development plan focused on parking, signage, traffic flow and landscaping will support future development



BEST PRACTICE EXAMPLES

Recreational, Seasonal, and Temporary Accommodations—
Policy supporting implementation

Example: Glen Oro Farm, Township of Oro-Medonte

Description

- Equestrian training facility that has expanded uses to include weddings, glamping farm-stays and trail rides

Planning/Policy Context

- Zoning By-law amendment completed in April 2021 to increase size of glamping platforms
- Exception in the Zoning By-law to permit on-farm diversified uses and agri-tourism uses in addition to Agricultural/Rural Zone and Mineral Aggregate Resource Zones permitted uses





NEXT STEPS

NEXT STEPS

Phase 2: Opportunity Evaluation & Policy Recommendations

1. Evaluation of Tourism Investment Opportunities
 - Market Factors
 - Location Factors
 - Investment Factors
 - Planning & Policy Implications
2. Tourism Investment Opportunity Assessment Review
3. Identification of Top 4 Tourism Investment Opportunities
4. Tourism Policy Review, Best Practices and Recommendations
5. Draft Final Report and Steering Committee Meeting
6. Final Report & Council Presentation

PROJECT SCHEDULE

Timeline

Start Up Meeting	August 30
Phase 1 Presentation	October 14
Tourism Investment Opportunity Assessment Review	November 3
Draft Final Report	Mid-November
Final Report	End of November
Anticipated Completion/Council Meeting	December 8



Questions?