
Rondeau Provincial Park Area Visitor Centre Feasibility Study

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1 INTRODUCTION

1.1 Background

The existing Rondeau Provincial Park Visitor Centre is an educational facility portraying the natural history of Rondeau Provincial Park. There are displays of park features, wildlife and human history, live animals during the summer and a birding garden window where visitors can sit inside and watch a variety of species feed at the feeders. The Friends of Rondeau Bookstore is also located in the Visitor Centre and offers numerous nature publications, gifts and equipment. The existing Visitor Centre is open year-round (with limited fall and winter hours).

The Rondeau Provincial Park Management Plan states, in part, “Major improvements will be made to [the Visitor centre] to encourage public use and maximize exposure to interpretive programs. Improvements will include new exhibits, universal accessibility, washroom upgrading, a new theatre and internal renovations.” In recent years, many of these renovations have been done. However, the existing facility is not designed efficiently nor located centrally to optimize its use. It was not originally designed and constructed to be opened during the winter. Although the facility has been retrofitted to be more energy efficient, it still is a relatively expensive facility to heat and cool.

According to Statistics Canada, tourism to rural destinations accounted for almost half of all tourism in Canada in 2002. In 2003, visitors to Chatham-Kent spent \$58,328,689.

1.2 Study’s Goals and Objectives

The objectives of the study were to:

- Articulate a vision/mission for a new facility

- Develop a operating relationship between the new facility and other facilities in the region such that new facilities operate optimally within the context of the various other facilities and tourism resources throughout the region
- Estimate capital costs of the facility
- Examine operating costs (including staff requirements)
- Assess operating revenues (based upon attendance projections, as well as other sources of revenues such as rentals, etc.)
- Develop a financial model, examining both operating costs and revenues
- Develop a business case to make the case that these facilities have a payback to park, municipality and other partners/ stakeholders

1.3 Report Outline

This report contains the following chapters:

- The *Situation Analysis* chapter examines the key aspects of the tourism sector in Chatham-Kent, specifically, tourism statistics, forecast of tourism and other relevant trends.
- The *Rondeau Provincial Park Profile* chapter provides an visitation and programming statistics and a profile of park market segments.
- The *Rationale for a new Visitor Centre* chapter summaries the strategic and tactical arguments why a new visitor centre should be built.
- The *Estimate of Future Attendance Estimates* chapter provides an estimate of the incremental attendance to the park resulting from development of the visitor centre.
- The *Location and Site Issues* chapter discusses to location of Chatham-Kent's Tourist Information Centres and the location of the Visitor Centre within Rondeau Provincial Park.
- The *Visitor Centre Thematic Program* chapter discusses the thematic options for interpretation at the facility.
- The *Visitor Centre Development Program* chapter indoor and outdoor elements of the facility, the spatial requirements and the estimated capital costs of the facility.
- The *Financial Analysis* chapter estimates revenues and expenses an presents a five-year operational pre forma budget..
- The *Economic Impact* chapter estimates the economic impact attributable to both capital construction and incremental operations.
- The *Implementation Plan* chapter outlines the actions to be taken to proceed with the project toward development and operation.
- *Appendix* includes a profile of other proposed and operating Visitor Centre facilities.

1.4 Note to Final Report

Ontario Parks was happy to contribute to the funding of this Feasibility Study and to participate on the Steering Committee during the preparation stage.

It should be noted that the completion of a this study will be helpful during completion of a Management Plan review and the associated decision making process about the possible relocation of the Visitor Centre to a new site in Rondeau Provincial Park.

Like all major capital projects, a proposed Visitor Centre would be evaluated against other capital projects in the provincial park system and assigned an appropriate priority ranking. This is a separate and distinct process from the completion of a Feasibility Study or the completion of a Management Plan review. It is a process which occurs annually whereby projects are evaluated against available funding to Ontario Parks, revenue generation potential, facility and infrastructure renewal, etc.

2 SITUATION ANALYSIS

This chapter of the report presents: an overview of tourism in Chatham-Kent, a forecast for tourism in Ontario and a listing of other pertinent trends in tourism, germane to the Rondeau Visitor Centre.

2.1 Tourism in Chatham-Kent

In this section, we document key statistics regarding tourism in Chatham-Kent.

The statistics and commentary are derived from the Ontario Ministry of Tourism and Recreation's Regional Tourism Profiles and the 2003 Canadian Travel and International Travel Surveys. In the following sections, data tables follow the charts.

2.1.1 Visitation

2.1.1.1 *Total Person Visits*

Between 1998 and 2003, person visits to Chatham-Kent declined by 34%, from 1,442,528 to 949,723. This decline in tourism to the region parallels the decline in attendance at Rondeau Provincial Park (attendance statistics shown in Chapter 3).

In 2003, of these visitors 356,138 or 37% stayed in the area for one plus nights and the balance, 593,585 or 63 %, made a same-day visit to Chatham-Kent. The overnight pleasure visit market (of which Rondeau would primarily attract) has been erratic over that period, typical of weather dependency.

Figure 1, Total Person Visits to Chatham-Kent by Length of Stay and Main Purpose, 1998 to 2003

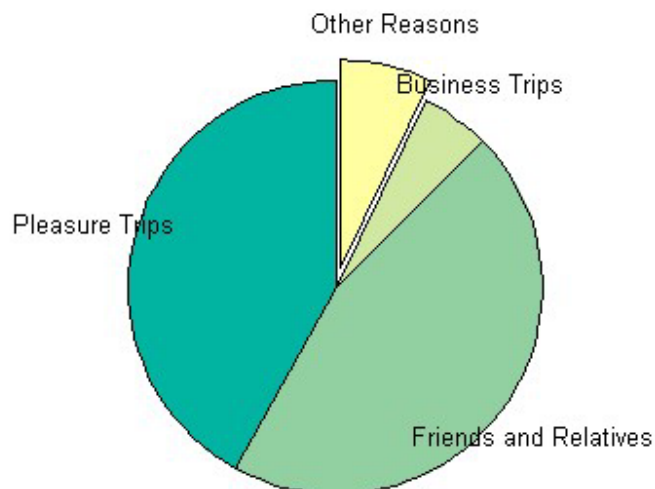
| Title/Year | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 |
|----------------------------------|-----------|-----------|-----------|---------|-----------|---------|
| Total Visits | 1,442,528 | 1,197,819 | 1,093,235 | 908,498 | 1,296,756 | 949,722 |
| Same Day Visits | 972,377 | 837,921 | 717,966 | 635,232 | 877,757 | 593,585 |
| Overnight Visits | 470,150 | 359,898 | 375,269 | 273,265 | 418,999 | 356,137 |
| Overnight Pleasure Visits | 185,526 | 106,773 | 145,575 | 144,884 | 176,987 | 159,102 |
| Overnight VFR Visits | 242,818 | 211,725 | 173,914 | 96,768 | 177,394 | 153,252 |
| Overnight Business Visits | 19,277 | 20,169 | 25,725 | 14,327 | 17,666 | 24,257 |
| Other Overnight Visits | 22,527 | 21,230 | 30,054 | 17,285 | 46,950 | 19,525 |

Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.1.2 Purpose of Trip

In 2003, of the 356,138 overnight visitors to Chatham-Kent, 159,102 (45%) were on pleasure trips, 153,253 (43%) were traveling to visit friends and relatives, 24,258 (6.8%) were on a business trip and 19,525 (5.5%) were traveling for other reasons.

Figure 2, Main Purpose of Overnight Trips to Chatham-Kent, 2003

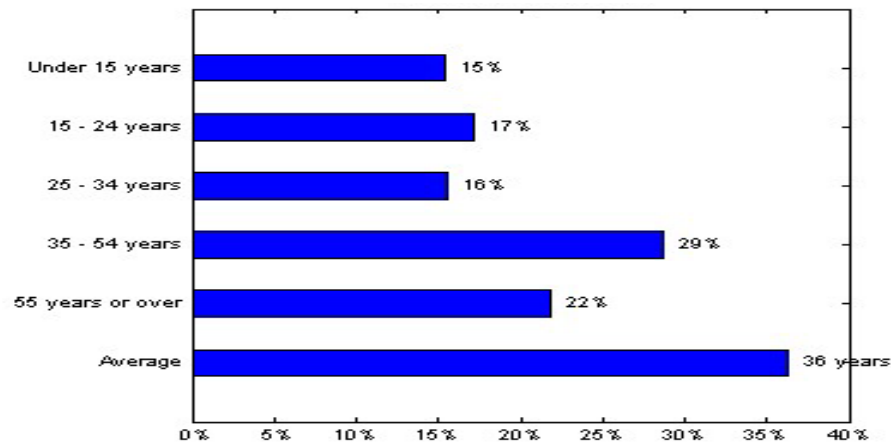


Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.1.3 Age

In 2003, the average age of overnight visitors to Chatham-Kent is approximately 36 years.

Figure 3, Age of Overnight Visitors to Chatham-Kent, 2003



Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.1.4 Tourist Origin

2.1.4.1 Person Visits by Residents of Other Countries

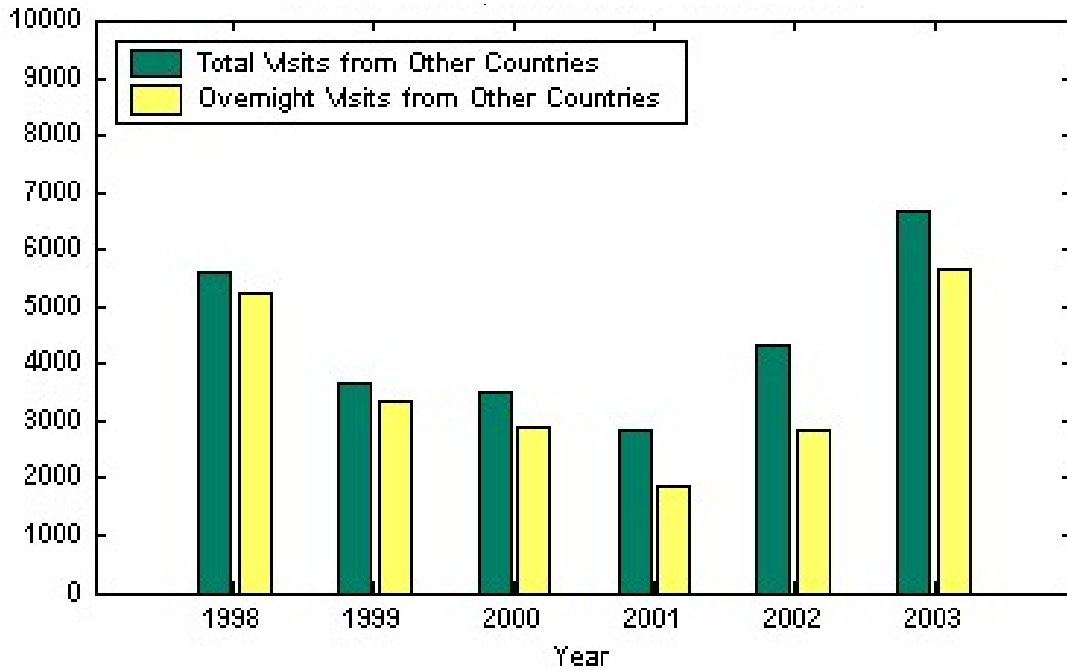
Person visits by residents of other countries to Chatham-Kent grew by 20%, between 1998 and 2003; from 5,586 to 6,691.

Figure 4, Person Visits by Residents of Other Countries, 1998 to 2003

| Title/Year | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 |
|--|-------|-------|-------|-------|-------|-------|
| Total Visits from Other Countries | 5,585 | 3,677 | 3,518 | 2,863 | 4,339 | 6,690 |
| Overnight Visits from Other Countries | 5,259 | 3,360 | 2,891 | 1,855 | 2,841 | 5,655 |

Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

Figure 5, Person Visits by Residents of Other Countries, 1998 to 2003

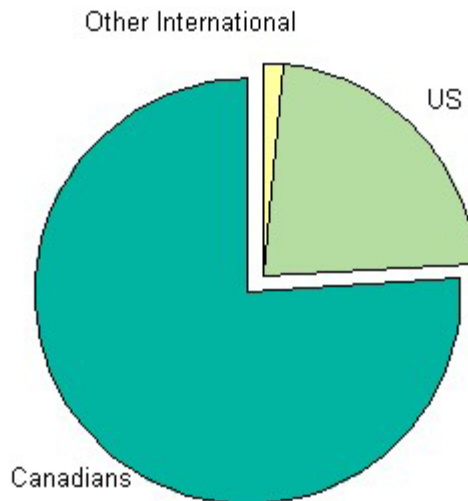


Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.1.4.2 *Overnight Visitors by Origin*

In 2003, of all overnight visitors to Chatham-Kent, 270,501 (76%) were Canadians, and 85,637 (24%) were international visitors, including 79,981 (22%) from USA and 5,656 (2%) from other countries.

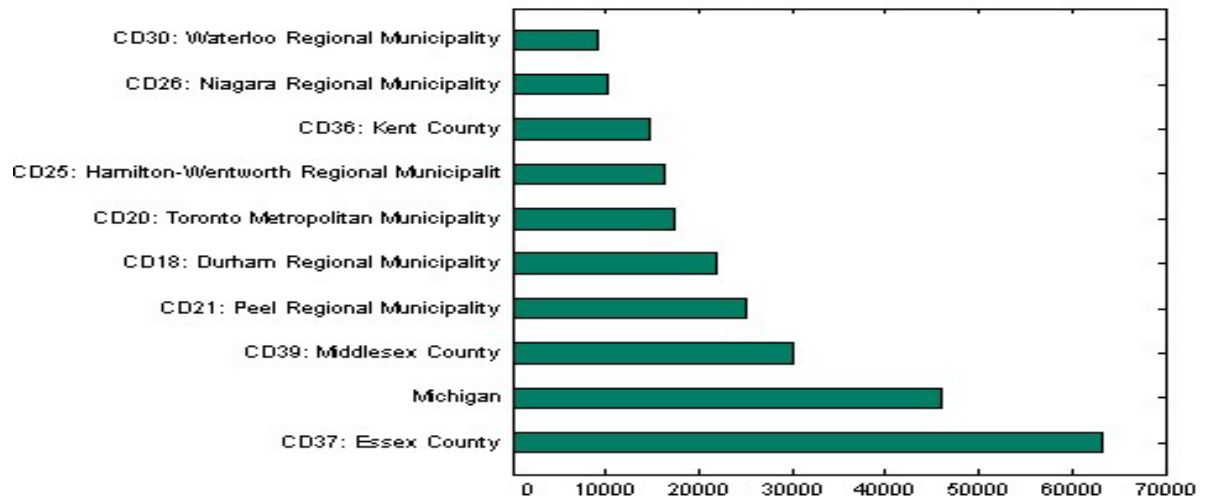
Figure 6, Overnight Visitors to Chatham-Kent by Origin, 2003



Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

In 2003, the top 10 markets of overnight visitors for Chatham-Kent are shown in the chart below. For example, 18% of all overnight visitors to Chatham-Kent came from CD37: Essex County.

Figure 7, Overnight Visitation to Chatham-Kent by Origin, 2003



Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.1.5 Party Size

In 2003, 81% of the overnight visitors to Chatham-Kent were traveling in adult-only parties and the remaining 18% were traveling with at least one individual fifteen years of age or younger. The average party size for overnight visitors was 2 (including children). Rondeau's average party size is 4.3 persons.

2.1.5.1 Person Visits by Americans

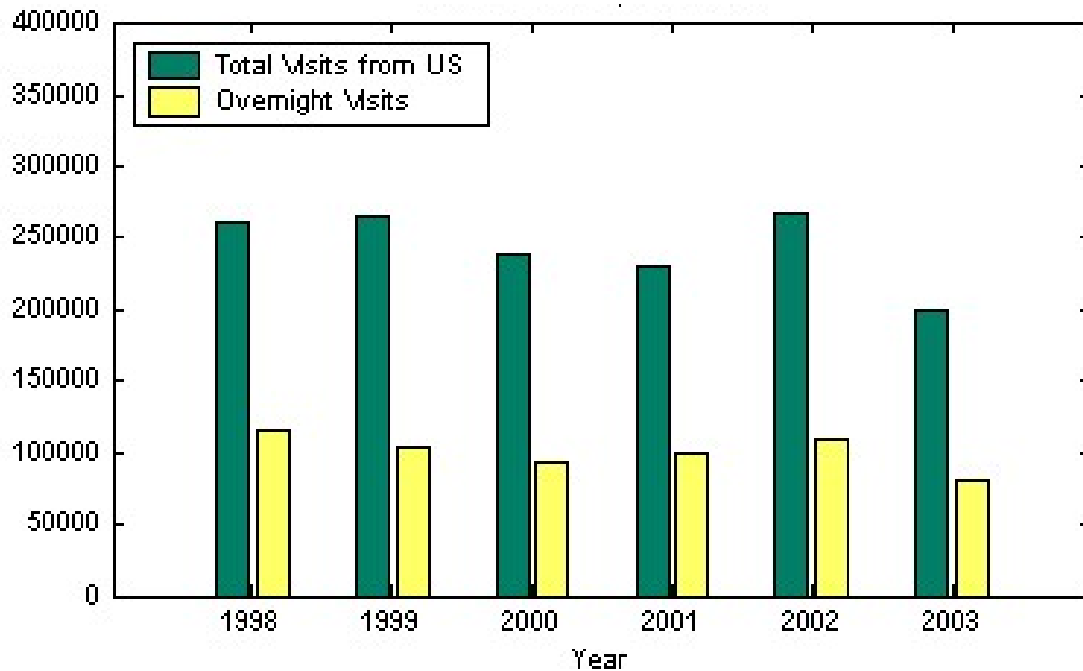
Between 1998 and 2003 person visits by US residents to Chatham-Kent declined by 24%, from 261,404 to 198,626. Proximity to the American border make the U.S. market an important market for both Rondeau and tourism in Chatham-Kent.

Figure 8, Person Visits by Americans to Chatham-Kent, 1998 - 2003

| Title/Year | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 |
|-----------------------------|---------|---------|---------|---------|---------|---------|
| Total Visits from US | 261,404 | 265,134 | 238,238 | 231,072 | 267,470 | 198,626 |
| Overnight Visits | 116,464 | 102,907 | 93,260 | 99,478 | 109,460 | 79,981 |

Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

Figure 9, Person Visits by Americans to Chatham-Kent, 1998 - 2003

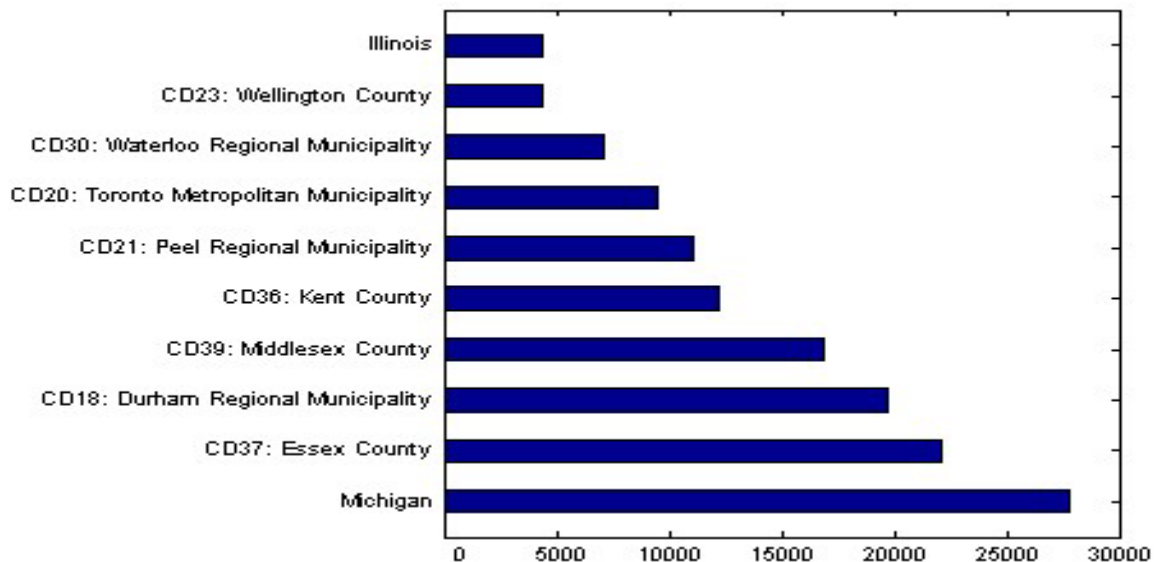


Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.1.5.2 Origin of Overnight Pleasure Trips

In 2003, visitors on overnight pleasure trips to Chatham-Kent came from various Ontario cities, other parts of Canada, USA states and other countries. The chart below shows the top 10 places of residence.

Figure 10, Origin of Overnight Trips to Chatham-Kent, 2003



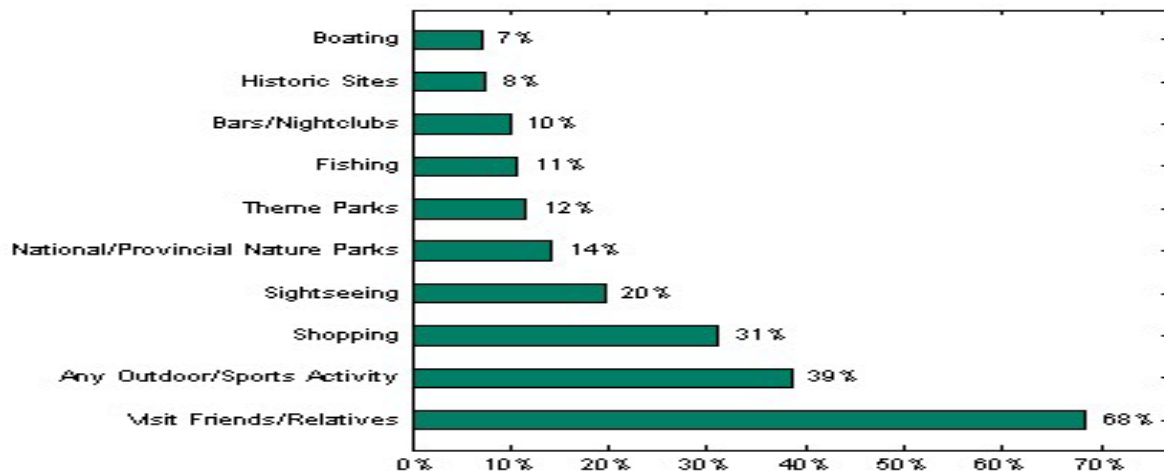
Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.1.6 Activities

2.1.6.1 Activities on Trip among Overnight Visitors

In 2003, the top 10 trip-activities engaged in by overnight visitors to Chatham-Kent are displayed in the following chart. “Visiting Friends/Relatives” was an activity that 68% of all overnight visitors to Chatham-Kent participated in while on their trip. Fourteen percent indicated that they visited a national or provincial park.

Figure 11, Activities Engaged In by Overnight Visitors to Chatham-Kent, 2003



Source: Statistics Canada, 2003 Canadian Travel Survey/ International Travel Survey

2.2 Ontario Tourism Market Forecasts

2.2.1 Intra-Provincial Travel in Ontario

Intra-provincial travel in Ontario jumped by 5.2 percent in 2004 following a sharp contraction in the previous year, a significantly stronger increase than was anticipated by the Ontario Ministry of Tourism. Over the years to 2009, intra-provincial travel in Ontario is expected to grow at an average annual compound rate of 3.9 percent.

The number of same day visits represents about 64 percent of total intra-provincial travel however it's expected to be considerably slower growing than overnight visitors. The number of overnight visitors is expected to average 4.8 percent on a compounded annual basis between 2005 and 2009 while same day visits will average only 2.9 percent.¹

¹ Global Insight, The Ontario Tourism Outlook, 2005-2009, p 5.

2.2.2 Inter-Provincial Travel

It is expected that the number of visitors to Ontario from other provinces will grow slowly over the next five years, averaging a 0.7 percent compounded annual rate. Part of this sluggish growth relates to the stronger Canadian dollar against the U.S. currency, which will favour Canadian travel to the U.S. and reduce the growth of travel within Canada.

- The number of same day visitors was estimated to be 1.4 million in 2004 and is expected to edge somewhat lower by 2009 – mainly due to non-business travel. While the number of overnight visitors are expected to reach 4.18 million by 2009, a compounded growth rate of 1 percent annually.
- The number of non-business travelers is expected to fall this year and edge lower over the forecast horizon.²

2.2.3 U.S. Inbound to Ontario

The number of U.S. visitors is expected to increase by a compounded annual rate of 3.2 percent over the five years ending in 2009.

The number of overnight stays is expected to expand by 5.5 percent over the five-year period ending in 2009. Same day visits from the U.S. to Ontario are expected to expand by 1.8 percent over the five years ending in 2009. The number of non-business visitors is expected to expand steadily by 5.3 percent.³

2.2.4 Overseas Travel to Ontario⁴

Over the five-year period ending in 2009, the compounded average annual growth rate in the number of visitors from overseas is expected to be:

- 10 percent from Germany, reaching 222,000 visitors in 2009.
- 10.9 percent from France, reaching 238,000 visitors in 2009.
- 9.2 percent from Great Britain, reaching 672,000 visitors in 2009.
- 9 percent from Japan, reaching 384,000 visitors in 2009.
- 9.1 percent from other overseas countries, reaching 1.82 million visitors in 2009.

² Global Insight, *The Ontario Tourism Outlook, 2005-2009*, p 8.

³ Global Insight, *The Ontario Tourism Outlook, 2005-2009*, p 10.

⁴ Global Insight, *The Ontario Tourism Outlook, 2005-2009*, p 13.

2.3 Other Relevant Trends

There are a variety of other local, provincial and international trends to be considered in the feasibility assessment, conceptualization, and planning of the Rondeau Park Visitor Centre. They are:

- Canada faces increased competition in international markets and is having difficulty in maintaining its competitive position. In 2003, a combination of the Iraq war, SARS, and mad cow disease significantly damaged Canada's market image as a safe and healthy international travel destination.
- Delays at Ontario's border crossings are of major concern. With pending threats of terrorism, there has been increased security at the U.S.-Canadian border and hence delays in border crossings. According to the Borders and Trade Development Committee of the Ontario Chamber of Commerce, the recent decline in U.S. travelers to Ontario has cost the province over \$200 million in annual potential tourism revenue. The increasing policies of the US to tighten boarder crossing will likely have a detrimental effect upon visitation to the Chatham-Kent region from the US. Conversely, preliminary anecdotal evidence suggests that the boarder restrictions are, and will continue to lead to Canadians travelling less to the US. This will partially offset declining U.S. visitation and gives rationale for targeting Canadian residents in Chatham-Kent's promotional efforts. Recent negotiations between Canadian and American officials have had the objective of minimizing the adverse effects (e.g. a "Passport Lite" for U.S. residents returning home).
- The rate of appreciation of the Canadian dollar has diminished Canadian tourist destinations' price competitiveness. As an export, tourism to Canada declines with the improving strength of the Canadian dollar. Compounding the situation is that Canadians can afford cheaper overseas holidays due to improved buying power.
- With oil prices reaching all time highs, a slowdown in the world economy is threatened. The potential impact could also have serious implications for both travel within and to Canada.
- According to the World Tourism Organization, Canada was still considered among the top tourism destinations in the world in 2003. However, it has moved to tenth place from seventh place in ranking by international tourist arrivals, as a result of a 13 percent decrease suffered in 2003. Moreover, Canada is no longer considered among the top ten tourism earners in the world – slipping to twelfth place earning US\$9.3 billion in receipts.
- The median age in Canada is now 37.6 years, up from 35.3 in 1996. This change is the largest census-to-census increase in a century. Canada's age distribution is also changing: 10.2% of all Canadians are 65 and over. Between 1991 and 2001, there was a 41% increase in those over 80 and a 12% increase in those over 65 while the 45-64 year age range rose 36%, reflecting the entry of "baby boomers" to this age group⁵.

⁵ Statistics Canada, 2003. Population Projections for Canada, Provinces and Territories 2000-2026.

- By 2015, most baby boomers will be retired and have increased leisure time. This will also result in greater demands on provincial parks as this mobile generation already has a strong interest in nature-based activities and travel, representing a large potential market for the learning and leisure experiences.
- The fastest growth over the next decade will be among seniors. After age 45, this market begins to enter the empty nester lifestyle, with high disposable income and more free time. After age 60, organization, comfort and safety become important elements in trip decision-making. Bus tours and organized packages become an important part of this group's travel behaviour.⁶ The Visitor Centre is conceived precisely as the type of facility to appeal to this demographic group.
- "Birding" as a leisure activity continues to grow in popularity, perennially ranking as a top leisure activity amongst adults.
- Visitation to Rondeau Prov Park by school groups is reported to be declining. This was reported by Park staff to be attributed, in part, to school board insurance policies that no longer utilize private vehicles for transportation. As a result of the cost to rent buses, trips to Rondeau have been fewer.
- The increased popularity of the Internet has had a major impact on the travel industry. In 2003, 22% of households that made online purchases reported making travel arrangements over the Internet, up from 18% the year before. Studies suggest that the greater prevalence of Internet reservations dampened room prices and operating profits for traveller accommodations providers, particularly non-affiliated ones.⁷
- There is generally more interest in educational components of travel, authenticity, cultural experiences and soft adventure.
- Levels of education amongst tourists are climbing along with increased knowledge of available leisure opportunities and the amenities associated with each.
- Increasing interest and use of RV rentals combined in fly-drive packages, more desire for educational, recreational and entertainment activities.
- Camper clubs and organizations will continue to thrive. Currently 12 percent of Canadian campers belonged to camping club/organization.
- Internet access is growing markedly for both on-line information collection and travel booking. In 2003, 35 million Americans made an on-line travel purchase, an estimated five million more than in 2002.

⁶ PriceWaterhouseCoopers, Chatham-Kent Economic Opportunity Study: Phase One Report, 2001, p 59.

⁷ Statistics Canada, How technology and global conditions affect the Canadian travel industry, 2005.

3 RONDEAU PROVINCIAL PARK PROFILE

3.1.1 Visitation Statistics

Visitation to Rondeau has been on a decline since 1999. This decline was experienced both in day users and in the occupancy rate of the campground. Winter visitation has experienced a more significant decline, approximately a 70% decline since 1999. Rondeau Park officials suggest the decline can be attributed to:

- Lack of new attractions/facilities/exhibits at Rondeau
- Overall decline in tourism
- Weather variations
- Poor quality of existing campsites (deteriorating, in need of levelling)
- Washrooms and showers in need of rehabilitation and improved maintenance)

Park users include: day-users, campers, cottagers, water fowlers, and churchgoers.

The following tables provide a statistical profile of visitation to Rondeau Provincial Park.

Figure 12, Rondeau Provincial Park Statistics, 1998 to 2004

| | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-----------------------------------|---------|---------|---------|---------|---------|---------|---------|
| General Visitor Statistics | | | | | | | |
| Visitors | 176,791 | 179,906 | 159,453 | 169,944 | 162,688 | 163,362 | 153,685 |
| Day-Use Visitors | 111,517 | 112,114 | 95,583 | 104,999 | 102,122 | 94,078 | 85,216 |
| Daily Vehicle | 16,645 | 16,570 | 12,902 | 13,507 | 12,862 | 11,159 | 9,817 |
| Seasonal Vehicle Permits | 1,892 | 1,926 | 1,725 | 1,820 | 1,692 | 1,634 | 1,489 |
| Bus Permits¹ | 44 | 56 | 31 | 34 | 21 | 22 | 12 |
| Campers | 18,650 | 19,369 | 18,249 | 25,978 | 16,369 | 18,725 | 18,505 |
| Camper Nights | 65,274 | 67,792 | 63,870 | 64,945 | 60,566 | 69,284 | 68,469 |
| Developed Campsites | 258 | 258 | 258 | 262 | 262 | 264 | 264 |
| Campsites | 16,819 | 17,287 | 16,347 | 16,706 | 15,370 | 15,658 | 15,770 |
| Average Length of Stay | 3.5 | 3.5 | 3.5 | 2.5 | 3.7 | 3.7 | 3.7 |
| Average Party Size | 4.3 | 4.3 | 4.3 | 3.8 | 4.3 | 4.3 | 4.3 |
| July-August % Occupancy | 70% | 70% | 66% | 69% | 68% | 67% | 63% |
| Winter Visitation | | | | | | | |
| Visitors | 24,078 | 26,293 | 18,594 | 13,571 | 8,018 | 8,847 | 7,992 |
| Day-Use Visitors | 24,078 | 26,293 | 18,594 | 13,548 | 8,018 | 8,847 | 7,992 |
| Daily Vehicle Permits | 2,503 | 1,496 | 1,338 | 1,059 | 906 | 618 | 442 |
| Seasonal Vehicle Permits | 530 | 719 | 456 | 296 | 121 | 201 | 192 |
| Bus Permits | 1 | 0 | 0 | 6 | 0 | 0 | 1 |
| Camper Nights | - | - | - | 23 | 0 | 0 | 0 |

¹ Bus Permit counts include School Buses
Source: Ontario Parks, Annual Statistical Profiles

3.1.2 Programming Statistics

Paralleling the decline in attendance, with few exceptions, participation in programming has generally been declining as well since 1999. Park staff cite the relationship between staffing and programs for the decline (i.e. there have been less staff each year).

The following table provides a statistical profile of Natural History Educational programming at Rondeau.

Figure 13, Rondeau Provincial Park Natural Heritage Education Attendance Statistics, 1998 to 2004

| | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|------------------------------------|-------|-------|-------|-------|-------|-------|-------|
| <i>Out-of-Park Programs</i> | | | | | | | |
| Extension | 51 | 35 | 66 | 1,136 | 192 | 3,152 | 1,888 |
| <i>Programs/Groups</i> | | | | | | | |
| School Groups | 1,550 | 2,002 | 1,166 | 865 | 778 | 928 | 546 |
| Other Groups | 210 | 82 | 67 | 547 | 532 | 270 | 101 |
| <i>Programs for Public</i> | | | | | | | |
| Guided Walks/Tours | 719 | 1,141 | 806 | 1,924 | 988 | 1,455 | 2,002 |
| Evening Programs | 475 | 1,303 | 827 | 940 | 1,490 | 2,398 | 1,158 |
| Film Nights | - | - | - | - | - | 0 | 32 |
| Campfires | 575 | 406 | 429 | 449 | - | 221 | 273 |
| Outdoor Recreation Skills | 70 | 258 | 83 | 161 | 100 | 99 | 42 |
| Children's Programs | 1,500 | 1,162 | 1,172 | 1,023 | 1,526 | 1,506 | 917 |
| Special Events | 6,689 | 9,851 | 1,865 | 2,874 | 3,040 | 2,161 | 1,000 |
| Interpretive Roving | - | - | 500 | 2,205 | 2,265 | 1,288 | 2,567 |
| Other Groups | 1,447 | 987 | 45 | - | - | 0 | - |
| Campsite Visitation | 1,130 | 1,072 | 950 | 3,059 | 3,974 | 9,279 | 5,489 |

Source: Ontario Parks, Annual Statistical Profiles

3.2 Profile Rondeau Park Users

Rondeau Provincial Park provides a unique destination for a unique component of the tourism market. This section of the report profiles the characteristics of two prime segments that

comprise the Rondeau Park market. The information has a diverse range of uses from an understanding the interests and users of the Visitor Centre to insight into how best to promote to the market and what types of packaging opportunities would be complementary to their interests.

In 1999/2000 two large scale surveys were conducted to assess the travel activities and motivators of pleasure travel among Canadians and Americans. This survey, known as the Travel Activities and Motivation Survey (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario. Analysis of TAMS resulted in the segmentation of the outdoor tourist market.

Large and organized group travel has been declining for the past several years⁸. The resulting smaller groups and fully independent travellers represent markets that are much more difficult to identify and to develop products for that are responsive to their needs. They are also harder to market to and communicate with, increasing the necessity to better understand their needs, requirements and expectations for travel. Additionally, there is an increase in specialized or niche markets that want specific products and experiences.

This section of the report describes the characteristics of the two predominant segments that comprise Rondeau Provincial Park's visitors, "Naturalists" and "Campers".⁹

3.2.1 "Naturalists" Segment

The following description to the "Naturalists" segment is drawn from an analysis of the TAMS survey¹⁰.

"Naturalists represent 8.1 % of Canadian travelers and 7.8 % of American travelers. They are the oldest outdoor segment (averaging 51.7 years of age). Their levels of annual household income and education are close to the overall average.

Naturalists were overrepresented among the more mature segments of the market including the Affluent Mature Singles, the Mainstream Mature Couples, the Mainstream Senior Couples, the Affluent Mature and Senior Couples and the Senior Singles.

The travel patterns of Naturalists over the past two years by destination and season were comparable to those of the average traveler. Both Canadian and American Naturalists also reported typical expectations for undertaking vacation travel in Canada in the next two years.

Naturalists were much more likely than other travelers to have sought out exploratory vacation experiences (e.g., seeing natural wonders, visiting museums and art galleries, seeing historical sites). On the other hand, they were less likely to have sought out

⁸ Canadian Tourism Commission, 2002. Canada's Heritage Tourism Enthusiasts - A Special Analysis of the Travel Activities and Motivation Survey - Executive Summary.

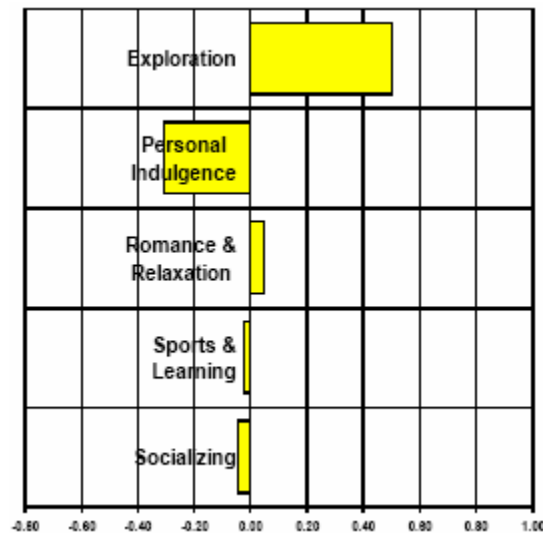
⁹ Lang Research, Travel Activities and Motivation Survey: Outdoor Segmentation Report, Ontario Ministry of Tourism, Culture and Recreation, November 2001.

¹⁰ Lang Research, Travel Activities and Motivation Survey: Outdoor Segmentation Report, Ontario Ministry of Tourism, Culture and Recreation, November 2001.

opportunities for personal indulgence (e.g., fine dining, night life). In terms of outdoor activities, Naturalists were much more likely than others to include natural sightseeing (e.g., bird watching, viewing wildflowers and flora) in their travel itineraries. They also reported above-average participation rates for culture and entertainment activities with a nature theme (visiting gardens and natural attractions, visiting agricultural and local fairs). They were also more likely to visit museums, art exhibits and historical sites than the average traveler. Naturalists appear to prefer relatively economical vacations. They were more likely than others to have taken touring trips by personal vehicle in the past two years. They also were more likely than others to have stayed at a motel or at a cottage (either rented or owned) when vacationing. Relative to other travelers, Naturalists were more likely to have planned their brief trips (1 to 3 days duration) by consulting printed material from travel information offices, travel guides or travel information received in the mail. They tended to use the same resources when planning their longer vacations, while supplementing these resources to a greater extent than others with information from newspaper or magazine ads, airline reservation systems, automotive clubs, and television programs.”

The following chart illustrates the relative importance of various travel experiences for the “Naturalists” segment.

Figure 14, Relative Importance of Travel Experiences for “Naturalists” Market Segment



Source: Lang Research, Travel Activities and Motivation Survey: Outdoor Segmentation Report.

3.2.2 “Campers” Segment

The following description to the “Naturalists” segment is drawn from an analysis of the TAMS survey¹¹.

¹¹ Lang Research, Travel Activities and Motivation Survey: Outdoor Segmentation Report, Ontario Ministry of Tourism, Culture and Recreation, November 2001.

“Campers represent 14.2 % of Canadian travellers and 9.2 % of American travelers. They are one of the younger outdoor segments with an average age of 41.3 years. They tend to have below average household incomes and less education than the average traveller. Campers were over-represented among the mainstream segments and especially the Mainstream Mature Families, the Mainstream Young Families, the Mainstream Mature Couples and the Mainstream Youth Market.

Campers represent an important short-haul domestic market for Canada. They are the largest active outdoor segment in the Canadian domestic market. Over the past two years, they were more likely than others to have taken a trip in their home state or province (66 % versus 59 %). Correspondingly, Campers were less likely than others to have travelled to Mexico, the Caribbean or overseas. Canadian Campers were also more likely than others to expect to take a trip in Canada over the next two years (78 % versus 68 %). On the other hand, American Campers were slightly less likely to have taken a trip to Canada during the past two years and slightly less likely to expect to visit to Canada within the next two years.

Campers were more likely than others to have sought opportunities to participate in a specific sport or have a hands-on learning experience. They were also more likely to have taken vacations which provide opportunities for relaxation, quality time with their families and romance. They were less likely to have sought out personal indulgence experiences (e.g., fine dining, nightlife) as these are generally more expensive, urban vacation experiences.

Not unlike the more affluent Resort Lovers and the young Outdoor Activists, the Campers exhibit above average participation rates in a variety of outdoor activities including fishing, natural sightseeing, canoeing or kayaking, hiking, skiing, swimming and sunbathing.

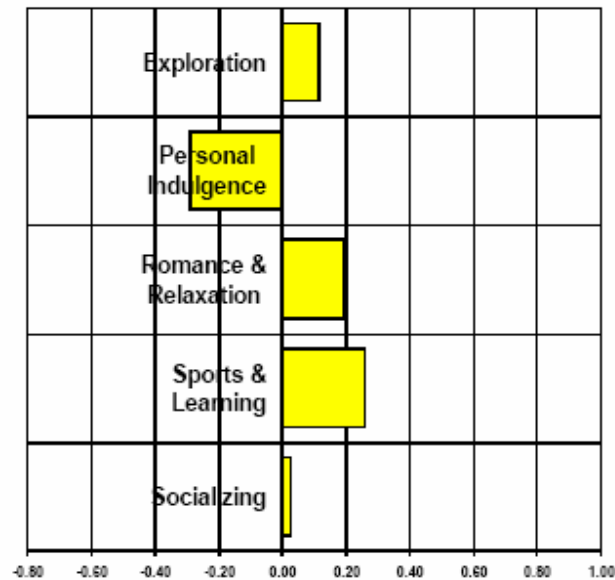
Cultural and entertainment activities do not appear to play a major role in travel activities of Campers. However, Campers were more likely than the average traveler to have gone to rodeos and auto racing or attended agricultural and local fairs.

Touring activities and accommodations both centered on travel using recreational vehicles such as tent trailers, truck campers or vans, travel trailers or motor-homes.

Campers tend to consult fewer sources of information when planning their vacations than the average traveler. This may suggest that this segment will be difficult to reach through most conventional media channels.”

The following chart illustrates the relative importance of various travel experiences for the “Campers” segment.

Figure 15, Relative Importance of Travel Experiences for “Campers” Market Segment



Source: Lang Research, Travel Activities and Motivation Survey: Outdoor Segmentation Report.

3.2.3 Summary Profile of Naturalists and Campers Markets

The following table highlights the characteristics of these two prime market segments for Rondeau.

Figure 16, Profile of Rondeau Provincial Park Market Segments

| Characteristic | Naturalists Segment | Campers Segment |
|----------------------------|---|---|
| Percent of Population | ▪ 7.1 % of Canadians (1,399,600 Canadians) | ▪ 12.5 % of Canadians (2,455,800 Canadians) |
| | ▪ 6.9 % of Americans (11,794,800 Americans) | ▪ 8.1 % of Americans (13,955,400 Americans) |
| Percent of Travellers | ▪ 8.1 % of Canadians | ▪ 14.2 % of Canadians |
| | ▪ 7.8 % of Americans | ▪ 9.2 % of Americans |
| Average Age | ▪ 51.7 years old | ▪ 41.3 years old |
| Dominant Age Group | ▪ 64.3 % of 46 plus age group | ▪ 71.0 % of 26 to 55 age group |
| Dominant Life Cycle Stages | ▪ Senior Singles (10.0 %) | ▪ Mature Families (8.8 %) |
| | ▪ Mature Couples (32.2 %) | ▪ Young Couples (9.2 %) |
| | ▪ Senior Couples (9.4 %) | ▪ Young Families (30.6 %) |
| | ▪ Mature Singles (17.2 %) | ▪ Mature Couples (20.3 %) |
| Household Income | ▪ \$54,500 | ▪ \$49,500 |

| Characteristic | Naturalists Segment | Campers Segment |
|--|---|--|
| Education | <ul style="list-style-type: none"> ▪ 20.5 % with household income of \$80K or more ▪ 65.8 % University/College ▪ 13.6 % Advanced Degrees | <ul style="list-style-type: none"> ▪ 12.9 % with household income of \$80K or more ▪ 53.1 % University/College ▪ 7.3 % Advanced Degrees |
| Employment Status | <ul style="list-style-type: none"> ▪ 48.1 % Employed ▪ 25.4 % Retired | <ul style="list-style-type: none"> ▪ 67.5 % Employed ▪ 14.7 % Retired |
| Top <i>Outdoor</i> Activities Sought during pleasure travel (rank order) | <ul style="list-style-type: none"> ▪ Natural Sightseeing (only activity with above average participation rates) | <ul style="list-style-type: none"> ▪ Fishing ▪ Natural Sightseeing ▪ Canoeing, Kayaking, Hiking ▪ Swimming and Sunbathing ▪ Motorcycling ▪ Skiing |
| Top <i>Culture and Entertainment</i> Activities Sought during pleasure travel (rank order) | <ul style="list-style-type: none"> ▪ Gardens and Natural Attractions ▪ Agricultural and Local fairs ▪ Museums, Art, Historic Sites ▪ Shopping and Dining ▪ High Arts | <ul style="list-style-type: none"> ▪ Rodeos and auto racing ▪ Agricultural and Local fairs ▪ Concerts, carnivals and festivals ▪ Museums, Art, Historic Sites ▪ Gardens and Natural Attractions |
| Top information Used to Plan Trips (rank order) | <ul style="list-style-type: none"> ▪ Advertising in newspapers/ magazines ▪ Travel information received in the mail ▪ Travel Guides such as Fodor's or Michelin | <ul style="list-style-type: none"> ▪ Advertising in newspapers/ magazines ▪ Past experience/ been there before ▪ Visits to trade/ travel/ sportman's shows ▪ Travel Guides such as Fodor's or Michelin |

Source: Lang Research, Travel Activities and Motivation Survey: Outdoor Segmentation Report, Ontario Ministry of Tourism, Culture and Recreation, November 2001.

4 RATIONALE FOR A NEW VISITOR CENTRE

This section of the report summarizes the rationale in support of a new Visitor Centre at Rondeau Provincial Park.

From a strategic standpoint, one of the most important and significant rationales for a new Visitor Centre is that it supports Ontario's Tourism Strategies in a strategic, near-border location. Product enhancement, new development, and the subsequent promotion and marketing efforts to packaging opportunities related to the Rondeau Visitor Centre is consistent with, and supports, Ontario's tourism market strategy. Some of the strategic priorities that the development of a new Visitor Centre at Rondeau addresses are:

- "Destination Planning and Development
 - The Ontario Government will work with municipalities and First Nations to identify the tourism potential for economic diversification of their communities.
 - Ontario Government's attractions and agencies will be strong magnets attracting many visitors. They will be catalysts for the development of tourism champions in their communities.
 - The government's own attractions will model best practices as innovative organizations.

- Through long-term capital planning, provincially-funded attractions will be revitalized to be key assets in attracting tourists to their areas.”¹²

Furthermore, analysis of the Travel Activities and Motivation Survey (TAMS) provides additional support for the new facility [bold italics added], specifically:

- “For both the U.S. near-border and domestic markets, it has been identified that Ontario’s **general marketing strengths revolve around rest and relaxation, family travel and scenery/natural wonders**. This suggests that **Ontario should continue to play to its combined strengths in both markets as a relaxing and scenic place to take a break with the entire family**. Seventy-two percent of American travelers gave Ontario a rating of 7 or higher “as a destination for enjoying the nature and the outdoors”.
- In the near-border market, **Ontario is considered to have niche marketing strengths in the areas of adventure/excitement and unspoiled nature**. In the near-border market, proximity is a key driver of both past visitation and future interest, with Michigan and New York State emerging as the key markets for Ontario by virtue of easy access to key border crossings. Getting beyond the distance barrier, however, will be a key marketing challenge for Ontario in the future, and one that must be met to drive future revenue growth. – [Rondeau’s location supports visitation from those states].
- **Being active (e.g., pursuing sports and outdoors activities) is a major pull factor in the U.S.**, with camping/lodges/lakeside resorts, cycling, etc., being specific product drivers. On the other hand, domestic travel tends to be driven by shorter getaways that are oriented towards VFR and relaxation, as well as being active. Camping, sports and other active outdoors activities are some of the key product drivers for domestic trips.
- Relative to other attributes, Ontario tends not to be perceived as a romantic or trendy destination, nor as a place to experience the good life. **Travelers from both markets also view Ontario’s culture/history product as a marketing weakness**. In particular, it is seen as lacking a distinct cultural identity as well as important historical sites. Ontario will need to mitigate some of these weaknesses in order to grow its markets in the future.
- Regarding its competitive position vis-à-vis other destinations, **Ontario performs least well on the “exploration” dimension, which includes nature, culture and history experiences**. Enhancing Rondeau enhances Ontario’s capabilities in the exploration dimension.
- Niche marketing strengths appeal to a smaller group of travelers. For near-border travelers, these include adventure/excitement and unspoiled nature, which point to **niche markets for Ontario’s outdoors adventure and ecotourism products**. Ontario is also seen as a safe and familiar destination.”¹³

¹² Ontario Tourism Strategy, 2002, pg 11.

¹³ Lang Research, Travel Activities and Motivation Survey: Outdoor Segmentation Report, Ontario Ministry of Tourism, Culture and Recreation, November 2001.

Other benefits of a new visitor centre would be:

- Create incremental demand for Park Visitation – Statistics indicate that less than 40% of Park visitors visit the Visitor Centre. A properly designed and programmed Visitor Centre can be a draw in itself. Much like a stand alone natural history museum, if it provides experiences and education that are unique in the area, it will likely stimulate visitation to the park. A new facility could create more of a destination attraction at Rondeau, leading to new and increased return visitation.
- Perception of Value – According to Park staff, there is a perception of a lack of value by visitors that pay Ontario Parks’ premium park rate (i.e. same admission price as Algonquin Park) but without similar amenities as the premium parks. Development of a new facility will enhance the visitors’ sense of value.
- Improved Location - The location of the existing Visitor Centre lacks profile in the park. Relocating the facility to the proposed location will take advantage of the natural transportation focus and community gathering area that has evolved at the Rondeau Park Road at Rondeau Avenue location. This, in turn, should lead to higher visitation and revenues.
- Improved Education Program – The existing facility is severely limited in its ability to produce educational and interpretive programming. Nonetheless, all reports indicate that the programming is good and well received. However, a lack of space severely limits indoor programming and inclement weather usually results in cancellations of programs rather than the ability to move it indoors.
- Improved technology – Supporting the educational and interpretive activities of the park, a new Visitor Centre would not only have sufficient space to accommodate the programming needs but it will be equipped with up-to-date A-V equipment, facilitating educational programming.
- Improved Interpretation – With the facility located at the water’s edge at Rondeau Park Road at Rondeau Avenue, it is envisaged that it will not only be designed to take full advantage of the vista over Rondeau Bay, but it will foster more direct education and interpretation of the Bay’s history and role in the Rondeau Park’s land, flora and fauna.
- Economies of Operation – A new facility will enable park personnel and services to be aggregated in the facility. On-site staff presence will improve both customer service and monitoring/security.
- Enable Proper Care of Important Artifacts – In the 112 year history of Rondeau Provincial Park, numerous significant and valuable natural history artifacts have been collected and donated to the Park for a public benefit. However, spatial limitations have precluded public exhibition of those artifacts. Furthermore, there is not proper space and equipment to store the artifacts. As a consequence, items such as eggs of now extinct birds are kept in unsecured filing cabinets. This lack of care and security could result in loss treasures to the park and the public.
- Energy Efficiency – The existing facility was never designed to be open during winter months; as a consequence, it is energy inefficient. Although the facility has been

retrofitted to be more energy efficient, it still is a relatively expensive facility to heat and cool. The new facility will be designed and constructed to be open year round.

- Improved Tourism Promotion to Chatham-Kent – The inclusion of a Tourist Information Centre within the facility will give better profile to Chatham-Kent’s tourism infrastructure of accommodation, restaurants and attractions. The six Tourist Information Centres located throughout the municipality attract a total of 3,094 visitors in 2005. Assuming 174,000 visits to the park and visitor centre, the potential tourists that can be reached to promote Chatham-Kent’s tourism could instantly increase by more than 5,000% compared to that currently achieved with the six tourist information centres.
- Financial Savings to Chatham-Kent – Furthermore, the inclusion of the Tourist Information Centre within the facility will enable staffing between the Park and the Municipality to be optimized. During periods of high visitation, municipal staff will be on-site to answer the many questions that are now addressed to Park staff regarding such things as: where to stay or eat and what other complementary attractions can they visit. This will save park staff time to focus more on interpretation and other aspects of their jobs. Similarly, during periods of low visitation, park staff can direct tourists to the information contained within the Tourist Information Centre, eliminating the need for year round municipal staffing.

5 ESTIMATION OF FUTURE ATTENDANCE

This section of the report provides an estimation of attendance that might be expected at Rondeau if a new Visitor Centre was built. Three variables were considered to estimate attendance:

- Historic visitation to Rondeau Provincial Park
- Forecasted tourism to Chatham-Kent
- Assessment of incremental demand created by the enhanced facilities

Each of these variables is discussed in the following sections.

5.1 Rondeau Park Visitation

The prime factor in estimating attendance to a new visitor centre will be the historic levels of attendance and the trends in that attendance.

As shown in the previous chapter, Rondeau has experienced generally declining attendance since 1999. Attendance at Rondeau has declined from 179,906 in 1999 to 153,685 in 2004, for an average decline of 2.3% annually. The average attendance over the seven year period was 166,547.

There are caveats to the visitation statistics provided by the park. For example, estimates for attendance by season vehicle permits are based on a calculation that is used for every park in the province regardless of its location. Specifically, it is assumed that every permit is used 10 times per year. Although no statistics are available, Rondeau officials think this underestimates season pass holders attendance at Rondeau. Furthermore, there is no charge (nor counting) of visitors walking into the park. This is increasingly popular since no fees are charged for walk-ins.

To put Rondeau Park's decline in attendance into perspective, the following table presents a comparison of Rondeau's attendance to that of Wheatley Provincial Park and Point Pelee National Park (both located approximately 60 km to the west of Rondeau). Wheatley has experienced an average increase from 2001 to 2004 of over 5% annually. Over the same period, Rondeau declined by 2.4% and Point Pelee declined by 2.9%. Several factors affect this comparison (e.g. proximity to US, weather, on-site amenities, etc), however, it serves to illustrate that the tourist market for Rondeau has the potential to grow as Wheatley has grown.

Figure 17, Park Attendance, Selected Parks, 2001 to 2004

| | 2001 | 2002 | 2003 | 2004 | Average Annual Change |
|-----------------------------------|---------|----------|---------|---------|-----------------------|
| Rondeau Provincial Park | 169,944 | 162,688 | 163,362 | 153,685 | -2.4% |
| Wheatley Provincial Park | 75,419 | 73,187 | 90,569 | 91,815 | +5.4 |
| Point Pelee National Park* | 323,349 | 331,193, | 306,477 | 295,562 | -2.9% |

* Note Point Pelee National Park does not have regular camping within the park (only group camping).
Source: Ontario Parks, Annual Statistical Profiles

5.1.1 Periods of Peak Demand

In planning for a facility with such high seasonality, it is important to identify the peak demand period for purposes of building capacities and spatial needs, transportation, parking, etc. As shown on the following tables, monthly attendance at the existing Rondeau Visitor Centre is predominantly during the summer (with March to June being somewhat higher than the average park due to the birding influence).

Figure 18, Rondeau Provincial Park Attendance by Month, 2003

| | Jan | Feb | March | April | May | June | July | Aug | Sept | Oct | Nov | Dec | Total |
|--------------------|------|------|-------|--------|--------|--------|--------|--------|-------|-------|------|------|----------------|
| Visitors | 717 | 504 | 5,232 | 14,172 | 26,864 | 21,972 | 33,021 | 33,978 | 6,479 | 4,983 | 348 | 282 | 148,552 |
| | 0.5% | 0.3% | 3.5% | 9.5% | 18.1% | 14.8% | 22.2% | 22.9% | 4.4% | 3.4% | 0.2% | 0.2% | 100.0% |
| Bus Permits | 0 | 0 | 0 | 1 | 9 | 7 | 0 | 3 | 1 | 1 | 0 | 0 | 22 |

Source: Rondeau Park Statistics

Figure 19, Rondeau Visitor Centre Attendance by Month, 2001 to 2005

| | Jan | Feb | March | April | May | June | July | Aug | Sept | Oct | Nov | Dec | Total |
|----------------|--------------|--------------|--------------|--------------|---------------|--------------|---------------|---------------|---------------|--------------|--------------|--------------|---------------|
| 2001 | 426 | 376 | 2,917 | 2,506 | 9,204 | 5,134 | 12,337 | 12,399 | 6,799 | 2,997 | 687 | 591 | 56,373 |
| | 0.76% | 0.67% | 5.17% | 4.45% | 16.33% | 9.11% | 21.88% | 21.99% | 12.06% | 5.32% | 1.22% | 1.05% | 100.00% |
| 2002 | 689 | 506 | 1,075 | 0 | 7,014 | 4,433 | 9,370 | 13,839 | 4,010 | 1,343 | 767 | 385 | 43,431 |
| | 1.59% | 1.17% | 2.48% | 0.00% | 16.15% | 10.21% | 21.57% | 31.86% | 9.23% | 3.09% | 1.77% | 0.89% | 100.00% |
| 2003 | 256 | 198 | 2,540 | 1,091 | 13,376 | 5,675 | 11,963 | 11,285 | 5,869 | 1,258 | 1,486 | 901 | 55,898 |
| | 0.46% | 0.35% | 4.54% | 1.95% | 23.93% | 10.15% | 21.40% | 20.19% | 10.50% | 2.25% | 2.66% | 1.61% | 100.00% |
| 2004 | 116 | 120 | 1,386 | 1,409 | 10,432 | 5,471 | 10,812 | 9,821 | 6,174 | 3,091 | 638 | 310 | 49,780 |
| | 0.23% | 0.24% | 2.78% | 2.83% | 20.96% | 10.99% | 21.72% | 19.73% | 12.40% | 6.21% | 1.28% | 0.62% | 100.00% |
| 2005 | 201 | 383 | 1,474 | 1,421 | 9,926 | 2,248 | 5,927 | 7,533 | 3,278 | 2,034 | not open | 292 | 34,717 |
| | 0.58% | 1.10% | 4.25% | 4.09% | 28.59% | 6.48% | 17.07% | 21.70% | 9.44% | 5.86% | 0.00% | 0.84% | 100.00% |
| Average | 338 | 317 | 1,878 | 1,285 | 9,990 | 4,592 | 10,082 | 10,975 | 5,226 | 2,145 | 716 | 496 | 48,040 |
| | 0.70% | 0.66% | 3.91% | 2.68% | 20.80% | 9.56% | 20.99% | 22.85% | 10.88% | 4.46% | 1.49% | 1.03% | |

*Note Attendance affected by labour strike at Rondeau Provincial Park. Source: Ontario Parks, Annual Statistical Profiles

When compared to Algonquin Park Visitor Centre, the peak periods of attendance shows typical patterns of seasonality common to most provincial parks (with the exception of the minor peak during the spring birding season).

Figure 20, Algonquin Visitor Centre Attendance by Month, 2001 to 2005

| | Jan | Feb | March | April | May | June | July | Aug | Sept | Oct | Nov | Dec | Total |
|----------------|---------------------------|---------------------------|-----------------------------|-----------------------------|------------------------------|------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-----------------------------|---------------------------|---------------------------------|
| 2001 | 640 0.3% | 995 0.5% | 2,213 1.1% | 3,502 1.8% | 12,035 6.2% | 16,025 8.3% | 46,293 23.9% | 50,656 26.1% | 32,013 16.5% | 26,837 13.8% | 1,511 0.8% | 1,064 0.5% | 193,784 100.0% |
| 2002 | 696 0.4% | 895 0.5% | 491 0.3% | 675 0.4% | 10,619 5.7% | 15,684 8.4% | 43,629 23.3% | 50,108 26.8% | 26,995 14.4% | 34,997 18.7% | 1,406 0.8% | 864 0.5% | 187,059 100.0% |
| 2003 | 631 0.3% | 910 0.5% | 1,942 1.1% | 2,687 1.5% | 9,988 5.5% | 12,886 7.1% | 40,154 22.2% | 49,251 27.2% | 25,984 14.4% | 34,821 19.2% | 1,090 0.6% | 711 0.4% | 181,055 100.0% |
| 2004 | 775 0.4% | 1,059 0.5% | 2,344 1.2% | 2,989 1.5% | 11,251 5.6% | 14,799 7.4% | 55,013 27.4% | 48,372 24.1% | 28,824 14.3% | 34,229 17.0% | 794 0.4% | 562 0.3% | 201,011 100.0% |
| 2005 | 747 0.5% | 1,069 0.8% | 2,312 1.6% | 1,691 1.2% | 10,302 7.3% | 12,695 8.9% | 37,165 26.2% | 47,886 33.7% | 28,078 19.8% | | | | 141,945 100.0% |
| Average | 698 0.4% | 986 0.5% | 1,860 1.0% | 2,309 1.3% | 10,839 6.0% | 14,418 8.0% | 44,451 24.6% | 49,255 27.2% | 28,379 15.7% | 32,721 18.1% | 1,200 0.7% | 800 0.4% | 180,971 |

Source: Ontario Parks, Annual Statistical Profiles

5.2 Forecasted Tourism to the Chatham-Kent area

As discussed in Section 2.3, growth is expected in tourism to Ontario. Although no forecasts are available specific to the Chatham-Kent region, tourism to Ontario is forecast as shown in the following table.

Figure 21, Tourism Forecasts in Ontario

| | Forecasted Growth (Decline) to 2009 (Annualized) |
|------------------------------------|---|
| Intra-Provincial Travel in Ontario | 3.9% |
| Inter-Provincial Travel to Ontario | 1.0% |
| U.S. Inbound to Ontario | 3.2% |
| Overseas Travel to Ontario | 9% |

Source: Global Insight, The Ontario Tourism Outlook, 2005-2009, April 2005.

Given the preceding information, for purposes of this study, it is assumed that tourism to Chatham-Kent will grow modestly at a blended rate of 2% annually.

5.3 Assessment of Incremental Demand Created by the Enhanced Visitor Facilities

From interviews with other parks in which Visitor Centres were established, it was unanimously felt that enhanced visitor facilities at Rondeau Provincial Park would increase overall attendance.

For example, Algonquin Park officials reported that the opening of their Visitor Centre had a significant impact upon attendance. Although statistics were not available to illustrate the increased attendance, Park officials reported that prior to the Algonquin Visitor Centre's opening; Algonquin received approximately 30 motor coaches per year. After opening the Visitor Centre, they hosted approximately 700 per year. At an average of 40 people per coach, this segment of the market increased from 1,200 to 28,000. The increase visitation was explained to be as the result of the Visitor Centre's amenities satisfying the needs of motor coach operators and passengers. With the availability of washrooms, food services, gift stores, interpretive services, etc., tourist operators made Algonquin's Visitor Centre a stop on the circle tour of Southern Ontario.

Rondeau Provincial Park has a similar potential to experience growth in attendance as a result of a new Visitor Centre since it currently lacks the amenities desired by motor coach tours.

5.4 Estimated Incremental Attendance

The following are the key assumptions regarding factors that will affect park attendance:

- **Initial Attendance Level** – A new, significant facility such as the Visitor Centre will have a positive effect upon attendance. It is assumed that the opening of a new Visitor Centre will lead to an initial leap in attendance, from both local residents that have not recently visited the park and from tourists currently visiting Wheatley and Point Pelee. It is assumed that in the first year of operation, park attendance will increase by approximately 20,000 visitors. The assumed base level of attendance for the first year of operation of the new facility is 174,000. This assumption conservatively implies park attendance would still be below the Park's 1999 attendance. The new visitor centre can be looked upon not only as an enhancement to the Provincial Park but also as something of a natural history museum in its own right. Using this perspective, the assumed incremental attendance is commensurate with attendance to community museums. This increased attendance is also consistent with the experience of other parks after a new visitor Centre or interpretive pavilion has been opened.
- **Attendance Trend Reversal** – It is assumed that the trend of declining attendance since 1999 would be halted through the opening of the new facility as well as more favourable tourism conditions (e.g. increased U.S. near border visitation to the area, higher campground occupancy¹⁴, etc.). Furthermore, it is assumed that evolving demographic-based leisure and tourism trends will create new interest and provide a critical mass for partnerships, packaging, and overall growth in Rondeau's customer base.
- **Growth in Tourism to Chatham-Kent** – A growth rate in the number of visitors of 2% is assumed. This is commensurate with the provincial forecast for tourism growth.

This increased attendance is contingent upon achievement of the assumptions, good management practices as well as favourable exogenous variables (e.g. weather, international, national and provincial travel patterns, etc.).

¹⁴ Rondeau has experienced a decline in attendance since 1999, July/Aug Occupancy is now 63%, was 70%.

6 LOCATION AND SITE ISSUES

6.1 Location of Chatham-Kent Visitor Information Centre

A fundamental element of the facility is the incorporation of the Municipality of Chatham-Kent's Visitor Information Centre (VIC).

Chatham-Kent currently operates six Visitor Information Centres, operating seasonally during July and August. The six Visitor Information Centres are located in:

- Blenheim
- Bloomfield (Chatham)
- Ridgetown
- R&M Classic Car Exhibit (401)
- Wallaceburg
- Wheatley

The closest VIC to Rondeau is located in Ridgetown.

The following table provides an indication of the level of service at each of the six Visitor Information Centres. The statistics show that the extent of use at any of the Visitor Information

Centres is relatively low. The VIC with the highest attendance is the one that is incorporated into a popular local attraction (R&M Classic Car Exhibit at the 401).

Figure 22, Seasonal Tourist Kiosk Attendance in Chatham-Kent Visitor Information Centres Attendance, 2004 to 2005

| | 2004 | | | 2005 | | | % Change 2004-2005 |
|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------------|
| | July | August | Total | July | August | Total | |
| Blenheim | 82 | 61 | 143 | 270 | 127 | 397 | 177.6% |
| Bloomfield | 817 | 506 | 1,323 | 266 | 292 | 558 | -57.8% |
| Ridgetown | 320 | 253 | 573 | 232 | 235 | 467 | -18.5% |
| R&M Classic Car Exhibit | 405 | 405 | 810 | 550 | 467 | 1,017 | 25.6% |
| Wallaceburg | 151 | 227 | 378 | 170 | 160 | 330 | -12.7% |
| Wheatley | 267 | 132 | 399 | 208 | 117 | 325 | -18.5% |
| Total | 2,042 | 1,584 | 3,626 | 1,696 | 1,398 | 3,094 | -14.7% |

Source: Chatham-Kent Economic Development Department, 2005.

Chatham-Kent staff has indicated a specific role and goal for the Visitor Information Centre at Rondeau as being to “extend the length of stay within Chatham-Kent. Rondeau visitors have demonstrated interest in local attractions by attending Rondeau and the provision of information regarding other complementary attractions in the area would serve to either increase the length of stay for the current trip or provide the basis for a longer stay in future trips. As such, the location within the Rondeau Park serves the goal very well. Locating the VIC in Rondeau will allow for interaction with Rondeau’s 150,000 annual visitors in a comfortable, convenient location for them.

There are pros and cons to locating a VIC within Rondeau and they are listed in the following table.

Figure 23, Pros and Cons of a Visitor Information Centre within Rondeau Park

| Pros | Cons |
|---|---|
| <ul style="list-style-type: none"> • With year round operation of Rondeau Park Visitor Centre, Park staff can fulfill the information needs of tourists at times when municipal staff is not present. • Exposure to the target markets is optimized | <ul style="list-style-type: none"> • Since the Visitor Centre will likely be within the Rondeau Park Gates, Park admission would be required to visit the Chatham-Kent Visitor Information Centre. |

| Pros | Cons |
|--|--|
| <p>by providing the information to them in a convenient location</p> <ul style="list-style-type: none">• The relaxed ambiance of a Visitor Centre will be more conducive to ‘selling’ the benefits of a longer stay in Chatham-Kent.• A VIC within Rondeau would be complementary to other locations within Chatham-Kent.• Land is owned and available and has all necessary services available at the site. | <p>However, with other VICs available, there are alternative VIC locations for the public to collect information. An operational agreement between the Park and the municipality might be negotiated to allow free public access to the VIC.</p> <ul style="list-style-type: none">• |

Given the preponderance of positive factors to locating the VIC within Rondeau Provincial Park, it is recommended that Chatham-Kent work with Park officials to include the VIC within the Visitor Centre.

6.2 Siting of Visitor Centre within Rondeau Provincial Park

The location of the existing Visitor Centre is thought by Park staff and others to be sub-optimal for the following reasons:

- motor coaches cannot access it easily
- not easily accessible for campground
- it is isolated from other park services (e.g. park administration offices, food services, etc)
- it duplicates spaces required for ancillary services such as parking

Other sites were identified, both within and outside of the park, however, the preferred location for the facility by Rondeau Park staff is on Rondeau Park Road at Rondeau Avenue, adjacent to the existing food services facility and the Yacht Club. The site is of sufficient size to accommodate a large visitor centre and ancillary amenities and is 0.6 km inside the gates, adjacent to the existing store.

The site has no significant site constraints and has the following attributes:

- All utility services are available at the site (municipal water service (6” line) available at the site)
- Agglomerating the Visitor Centre with other park services (e.g. Yacht Club, etc.) creates economies of scale for site servicing, traffic, visibility, etc.

7 VISITOR CENTRE THEMATIC PROGRAM

Exhibits and the interpretive programs are the *raison d'être* for the facility. In this section, we discuss some of the potential themes to be interpreted at the facility.

It is important that the design of the building follow and support the thematic choices that are made so that the stories define the building, not vice versa. For that reason, it is recommended that significant thought be put into full development of the concepts and exhibits prior to engagement of an architect to design the building. Furthermore, it is important that Rondeau differentiate itself from the interpretation available at the competing parks of Wheatley and, especially, Point Pelee National Park (the latter having an advantage of greater awareness amongst the common market segments).

Rondeau is rich in interpretive options for the Visitor Centre. The Park Management Plan identifies the following broad themes to be emphasized¹⁵:

- Biological: the southern hardwood or Carolinian forest, the forest/deer relationship, marsh, beach dunes and associated significant flora and fauna;

¹⁵ Rondeau Provincial Park Management Plan, 1991, p 14.

- Physiological: the shoreline process of erosion and deposition which are presently occurring along the lake Erie shoreline;
- Cultural: the role of Rondeau in the fisheries of the Great Lakes and the importance of the area as a recreational resort.

Building on these guidelines, six potential thematic areas were identified. They are:

- Flora and Fauna of Rondeau
- Geomorphology of Rondeau
- Effect of Man's Interaction with the Natural Processes on Rondeau
- Local History of Rondeau

The following sections elaborate upon some of these the interpretive options for the Visitor Centre.

7.1.1 The Flora and Fauna of Rondeau

7.1.1.1 *Carolinian Forest*

Due to its temperate weather and protected environment, the Park is a prime example of a Carolinian hardwood forest of species normally found farther south.

7.1.1.2 *Significant Species and Species at Risk*

The Park contains many unique species of trees including the Tulip Tree, Sassafras and several trees for which only a few are known to exist. There are several species of both flora and fauna that are either deemed significant and/or are endangered.

7.1.1.3 *Birding*

Rondeau has been designated as an "Important Bird Area" by Bird Studies Canada. Interpretive birding storylines include:

- Species at risk and Rondeau's role in protecting them. For example, the Prothonotary Warbler is one of Canada's rarest birds. The Canadian population recently consisted of only 4-13 pairs. Since 1999 the species and its habitat have been formally afforded protection under Ontario's Endangered Species Act and Rondeau is one of the protected breeding areas.
- Bird Migration – Rondeau is located in prime migratory flyways and is renowned for its variety of bird species. Many of its visitors come during the prime spring and fall birding seasons, beginning with Tundra Swans in March and continuing through May with waves of Warblers.

7.1.1.4 *Butterfly Migration*

In early fall, Monarch butterflies from all over Ontario begin their migration south to Mexico. Rondeau Park is a major stopover site for the Monarchs, and many thousands may be seen on a sunny late summer afternoon. For the past five years the Monarch Butterfly Migration Festival has been hosted at Rondeau.

7.1.1.5 Invasive Alien Species

As with the local flora, the local fauna are being challenged in their native habitat by alien species that have been introduced from outside of the region.

7.1.2 Geomorphology of Rondeau

Formed by the erosion and deposition of sand and gravel, the Rondeau peninsula constitutes one of North America's best examples of a Cuspate Sandspit. The Park was formed by water currents depositing sand over several thousand years. The name Rondeau comes from the French, *ronde eau*, meaning "round water." The park is aptly named—the long peninsula of park land is divided by only a narrow channel from a second peninsula to form a snug harbour of round water.

7.1.2.1 Cross-Section of Rondeau Peninsula

A transect drawn through the park from west to east (the narrow part of the park) could be interpreted. The line would cross the peninsula. Starting at Rondeau Bay on the west side of the Park, the transect would cross microcosms of:

- Class One wetland in Rondeau Bay
- Maple/Beech forest (a true Carolinian forest with Tulip Tree, Sassafras, Spice Bush, etc.)
- Red Cedar/Oak Savannah
- Tall Grass Prairie
- Costal Zone (at beach on east side of park)

7.1.3 The Effect of Man's Interaction with the Natural Processes on Rondeau

7.1.3.1 Use of Fertilizers and Herbicides

The weeds within the Bay and the area farmers' steps to eradicate them have created problems in Rondeau Bay. The nutrient rich fertilizers encourage plant growth that creates the vegetation that boaters and water-skiers in the Bay do not want. The balance between interests and actions provides interpretive opportunities.

7.1.3.2 Deer Herd Reduction and Prescribed Burn

Although controversial, the annual herd reduction and prescribed burning takes place to protect, restore and perpetuate the biodiversity of the Rondeau's Carolinian ecosystems.

In the almost complete absence of predators some species can undergo explosive population growth when they are free from hunting. In Rondeau, deer populations have reached such high densities as to transform heavily forested habitat into a semblance of open grassland or savannah similar in appearance to over grazed cow pastures. The negative consequences are elimination of

required habitat for many rare native plant species and the elimination of forest-requiring habitat for several dozen bird species, particularly neo-tropical songbirds which are in serious decline.

7.1.3.3 *Rondeau's Role in Scientific Research*

Over the years, many people have been drawn to Rondeau for its potential in research due to its unique habitats, rare flora and fauna and its constant challenges to remain a healthy ecosystem. There has been ground breaking research done in many aspects, the most noteworthy being the extensive work done in the relationship between deer and forest vegetation. This work has led to Rondeau being able to implement new strategies to aid in the recovery of their forest health. From this several other protected places throughout Canada has adopted their methods and have also reached much success in sustaining the integrity of their threatened ecosystems.

Rondeau and its staff have supported and participated in many research projects to examine the natural wonders of the park. This interpretive theme could allow for current research to be highlighted and promoted as well as recruit visitors to participate during their stay (enhancing Park loyalty, thus encouraging repeat visitation to the park and region).

7.1.4 Local History of Rondeau Area

It is important for a local attraction such as this to interpret local history and events. This ensures relevance of the attraction to area residents, thus providing a reason for them to revisit the Park and Visitor Centre.

Rondeau was established in 1894 and is the second oldest park in Ontario. Rondeau has a colourful history; the land was first set aside by the British government as Ordinance Land by Lord Simcoe in 1795 and was used as a naval repair station during the War of 1812. The first Music Pavilion was built in 1896 and from that point Rondeau became renowned for the entertainment and the entertainers that it attracted.

Rondeau area played a significant role in the region's Black history, First Nations, and the War of 1812. Not only does this provide interpretive opportunities but also provides opportunities to create and promote packaged tourist opportunities with other attractions that appeal to the tourist interested in Black history.

Fisheries have played an important role in the history of Rondeau and can be chronicled and interpreted. Furthermore, the legacy of the cottagers within Rondeau can be the basis for an exhibit and would provide an opportunity to connect the cottage owners and their association to the Park and the Friends of Rondeau.

7.1.5 Marketing Opportunities Related to Rondeau Provincial Park

The association of the municipality's Tourist Information Centre with Rondeau Provincial Park can also support and facilitate the development of packaged and themed opportunities for travellers to Rondeau.

Results of the 2005 Rondeau Birders Survey conducted by the Municipality of Chatham-Kent indicated that some of the activities that birders *currently* combine with their birding trips include (in order of preference, highest to lowest):

- guided nature walks
- hiking
- interpretive centre activities
- cycling
- museums/ cultural sites
- antiques

The same survey also showed that the activities that birders *would like to* combine with their birding trips include (in order of preference, highest to lowest):

- Birding workshops
- guided nature walks
- fine dining
- evening slide programs

Section 3.2, The Profile of Rondeau Users, provides insight into the market and users of Rondeau and some of their key characteristics. That information can be used to create matches between tourist service providers and to foster packaging opportunities. A sample of the types of packaging opportunities that could be created are:

- Accommodation packages with the Wheels and other accommodation establishments. Perhaps including fine dining and presentations with a birding theme.
- Packages with the Black history theme, providing cross-promotion opportunities with Uncle Tom's Cabin and related attractions.
- Joint programming with Wheatley or Point Pelee to expose Rondeau to the larger group of users that visit those parks by virtue to their proximity to the boarder (e.g. Cycling trips between Rondeau and Wheatley and/or Point Pelee National Park).

8 VISITOR CENTRE DEVELOPMENT PROGRAM

This section describes the spatial aspects of the facility, including the necessary facility components, their preliminary size and comments describing notable aspects of the space. The development program assumes a building that is designed and constructed with sensitivity to the environment in which it is to be constructed.

8.1 Building Elements

8.1.1 General

The building should be:

- Designed to be complementary to the surrounding landscape (i.e. low rise, neutral colours, landscaping reflecting the Park's Carolinian forest, etc)
- Building and outdoor elements should be accessible and barrier-free
- Building should be designed for year round use and energy efficiency, considering the use of solar, thermal and other alternative energy sources that are not in conflict with the nature and philosophy of the Park

- Service areas should be adequately screened so not visible to the public
- Future expansion of the facility should be considered to allow for either expansion out or up if circumstances require it.

8.1.2 Main Entrance and Lobby

The main entrance should be distinctive, identifiable and inviting to the public. The outdoor area should provide sufficient space to allow groups to gather and organize before entering the building. The indoor area should also provide a similar space to gather and organize during inclement weather.

During winter months, coats will have to be accommodated and it is assumed that a coat rack will be installed in the lobby as opposed to a separate coat room.

Allowance has been made for 750 ft² for this space.

8.1.3 Reception and Tourist Information Centre

Connected to the Main Entrance and Lobby will be a Reception counter. The configuration of this space could take several forms, but Park and Municipal staff expressed a desire for a shared counter with self-serve racks surrounding the space.

During high tourist periods, municipal staff could be on-site to facilitate tourists to extend their stay in the Chatham-Kent area through counselling as to the tourist attractions and amenities that are available to match their interests. During low periods, this function could be performed (as it is now) by Park staff. Self-serve racks would allow visitors to browse the brochures and maps of the area at their leisure.

Allowance has been made for 120 ft² for the reception desk and 150 ft² for the Tourist Information Service Area. An additional 60 ft² has been allocated for coat storage.

8.1.4 Exhibits and Exhibit Area

Exhibits should be interactive, and change periodically to remain fresh and to encourage repeat visitation.

Consideration should be given to designing this space to a Class 'A' Art Gallery standard. This would not only provide the best environment for the Park's collection and exhibits, but it would also enable the park to exhibit touring and borrowed exhibits and art work.

Allowance has been made for 2,700 ft² for this space. The budget for exhibits is assumed to be \$150 per ft². This should allow for interactive components and the use of technology throughout.

8.1.5 Theatre/ Performance Area

A theatre/ performance area should be developed to accommodate the natural heritage education programs as well as seminars, lectures, community use and perhaps an ongoing multi-media presentation as part of the facility's exhibits. This space should be located near the Main Entrance and Lobby so that and adjacent to the Exhibit Hall for ease of access and to enable the Exhibit space to accommodate overflow audiences from the performance area.

Although preference had been expressed for a fixed seating, sloped floor theatre, a dedicated theatre would consume a significant amount of space and is costly. A multi-use space that can be expanded or contracted as programming needs and to ease future alterations to the facility if evolving demand dictates the need would satisfy the programming needs. The budget is based on a theatre/ performance space that has flexible seating. This should be confirmed prior to commencing the design phase.

The space should include: flexible lighting systems, audio-visual equipment, etc. Some seating could be fixed. The walls of the space could be adjustable, enabling the adjacent Exhibit Area to be included in the space when required.

Allowance has been made of 900 ft² for this space. This will accommodate up to 80 seats plus stage, backstage, storage and circulation space. (Algonquin theatre accommodates 125-130 people but actual use is reported by Park staff to be “never more than 50-70 users and usually 30-40”).

8.1.6 Group Activity Room

To support the Natural Heritage Education Program of the Park, a classroom-type space is recommended. As with the wall between the Exhibit Hall and the Theatre/Performance area, a flexible wall system should be considered for this space. This will allow the facility to alter its spaces as demand changes throughout the day.

Allowance has been made for 800 ft² for this space.

8.1.7 Nature and Gift Shop

Like many Provincial Parks, the Friends of Rondeau play an important role at Rondeau. They currently operate the Gift Shop and plan to continue to do so. A Nature and Gift Shop, staffed by the “Friends”, should be developed close to the Main Entrance and Lobby so that visitors can browse the store before and after entering the building. Consideration should be given to integration of the Nature and Gift Shop and reception function to optimize human resources. By locating the Nature and Gift Shop at the entrance, its profile will be greatest and enable sales as visitors come and go. It is also anticipated that the Nature and Gift Shop will expand its offerings to equipment rentals (e.g. canoes, binoculars, etc.).

The Nature and Gift Shop should incorporate an office type area and secure storage area for stock and valuables. Representatives of the ‘Friends’ should be consulted during the planning and design phases for their requirements.

Allowance has been made for 600 ft² for the Nature and Gift Shop and 350 ft² for the Friends Office.

8.1.8 Food Services

With the Visitor Centre being located at the site of the existing food services, food services will need to be incorporated into the facility. Given the proximity to grocery stores just outside the park gates, the proposed food services should be limited to prepared foods, convenience items, and perhaps some souvenir items. Outdoor seating at the visitor centre will add to the appeal of purchasing food at the new facility.

Plans should include both indoor and outdoor seating. Indoor allowance has be set at 1,000 ft².

8.1.9 Washrooms

Men's and Women's Washrooms should be situated off the Main Entrance and Lobby. Washrooms should be wheelchair accessible.

To provide service equally to men and women, typically women's washrooms should provide twice the fixtures as provided in a men's washroom. Allowance has been made of 90 ft² for the men's washroom and 180 ft² for the woman's washroom.

8.1.10 Ancillary Spaces

In addition to the main spaces of the Visitor Centre, the following ancillary spaces will be required:

- General Utility Room to house the HVAC, electrical, telecommunications, etc.) (300 ft²)
- Storage and Janitorial Closet (with sink, etc.) (400 ft²)
- First Aid Room (150 ft²)
- Circulation (assumed to be 10%)

8.1.11 Staff Area/ Administration Office

It is contemplated that the Natural Heritage Education function of the park would be operated from this facility, therefore, a staff area is included. This will include: staff offices, staff lounge (with kitchen facilities) and men's and women's staff washrooms.

Allowance has been made for: 600 ft² for offices, for 200 ft² for staff lounge, and 200 ft² for staff washrooms.

8.1.12 Archives and Storage

The Park has a limited but valuable collection of artefacts. These artefacts are currently in storage at the existing Visitor Centre. Although it is contemplated by Park Staff that the existing Visitor Centre will be maintained as a research facility for the park, interpretive and educational artefacts will be housed at the new facility.

Allowance has been made for 200 ft² for this space.

8.2 Outdoor Elements

8.2.1 Parking

In keeping with the general theme of integration into the surrounding environment, the parking area should be well landscaped and visually broken up with planting elements. The existing Visitor Centre has approximately 40-50 parking spaces and 2 bus spaces. Staff has indicated that that is insufficient for current demand. Given the estimated attendance, it is recommended that the Visitor Centre have a minimum of 60 parking spaces plus a minimum of 10 pull through spaces (for buses or trailers).

Given the proposed location of the new Visitor Centre, other parking areas can be aggregated (e.g. Yacht Club) which could reduce the overall need for spaces. A parking study during the peak summer months should be conducted to confirm the existing demand for parking at the proposed site. If aggregation of lots is to occur, some of the parking lot can be developed as overflow, perhaps using ‘paving blocks’ (i.e. concrete blocks with gaps to allow grass to grow between them and give a ‘softer’ appearance to the parking area.

A drop off area and bus turnaround will also be an important aspect of the design of the parking area.

8.2.2 Exterior Viewing and Seating Areas

The location of the Visitor Centre enables a clear vista of Rondeau Bay to the west. An outdoor viewing a seating area would serve the needs of: natural history education, passive use by visitors as well as a seating area for the food services.

The outdoor area should support the interpretive function of the Centre with outdoor exhibits.

The existing Visitor Centre incorporates popular indoor and outdoor viewing areas for birds feeding at feeders. The new facility should incorporate a similar observation area.

8.2.3 Service Areas

Service areas should be accessed from separate entrances and driveways and be visually separated from the public. In addition, the garbage bins should be physically separated and contained to minimize odours during the summer.

8.3 Summary of Development Program

From consultation with local building officials and based on the current construction costs of residential and commercial building in Chatham-Kent, it is estimated that construction costs will be approximately \$90 to \$110 per square foot (based on a slab on grade construction and no unusual site conditions).¹⁶

Total capitalized costs for the project are estimated to be \$2,465,130. The following table summaries the development program, indicates the recommended size per space and provides an estimate of the capitalized costs.

The capital cost estimate is intended to provide an allocation of the various capitalized costs for the Visitor Centre. Actual costs will depend upon the final design, quality of materials and finish, and the prevailing construction market conditions at the time of tender. Also, regulatory approvals such as an Environmental Assessment are not included in the capitalized costs, but would likely be required under current Ontario Parks policies.

¹⁶ Subsequent to completion of the study, Ontario Parks provided costing for three recently completed Visitor Centres (Killbear, French River and Lake Superior Provincial Parks) that ranged from \$342 per square foot to \$481 per square foot.

Figure 24, Summary of Proposed Visitor Centre Development Program and Estimated Capitalized Costs

| Space/ Function | Net Area (sq. ft.) | Gross Area (sq. ft.) | Cost / ft ² | Cost |
|---|-----------------------|-------------------------|------------------------|--------------------|
| Building | | | | |
| Main Entrance and Lobby | 750 | 825 | \$110 | \$90,750 |
| Reception Desk | 120 | 132 | \$110 | \$14,520 |
| Tourist Information Service Area | 150 | 165 | \$110 | \$18,150 |
| Coat/ Lockers | 60 | 66 | \$110 | \$7,260 |
| Exhibits and Exhibit Area | 2,700 | 2,970 | \$110 | \$326,700 |
| Theatre/ Performance Area | 900 | 990 | \$110 | \$108,900 |
| | | | | |
| Group Activity Room | 800 | 880 | \$110 | \$96,800 |
| Gift Shop/ Book Store | 600 | 660 | \$110 | \$72,600 |
| Friends of Rondeau Office Space | 350 | 385 | \$110 | \$42,350 |
| Food Services Area | 1,000 | 1,100 | \$110 | \$121,000 |
| Washrooms – Male | 90 | 99 | \$110 | \$10,890 |
| Washrooms – Female | 180 | 198 | \$110 | \$21,780 |
| Offices | 600 | 660 | \$110 | \$72,600 |
| Staff Lounge, with Kitchenette | 200 | 220 | \$110 | \$24,200 |
| Staff Washrooms | 200 | 220 | \$110 | \$24,200 |
| Storage and Janitorial Closet | 400 | 440 | \$110 | \$48,400 |
| General Utility Rooms (HVAC, Ele | 300 | 330 | \$110 | \$36,300 |
| First Aid Room | 150 | 165 | \$110 | \$18,150 |
| Archival Space | 200 | 220 | \$110 | \$24,200 |
| SUBTOTAL | 9,750 | 10,725 | | \$1,179,750 |
| Site Development | | | | |
| Landscaping | | | | \$100,000 |
| Parking lot | | | | \$200,000 |
| SUBTOTAL | | | | \$300,000 |
| Site Services | | | | |
| Building Permit | | | | |
| Building Services Connections | | | | |
| Construction Testing & Inspections | | | | |
| Building Systems Commissioning | | | | |
| Water / air balancing | | | | |
| Hydro fees | | | | |
| Supply of Finish Hardware | | | | |
| Building Systems Commissioning | | | | |
| Signage (Interior & Exterior) | | | | |
| Administrative Costs (Printing, etc.) | | | | |
| Professional Fees and Disbursements | 8% of above | | | \$130,380 |
| Exhibits and Exhibit Design | 2,700 | | \$150 | \$405,000 |
| Furnishings and Equipment | | | | \$300,000 |
| Furniture/Equipment | | | | |
| Security System | | | | |
| Audio Visual Systems , data, voice & communications | | | | |
| Miscellaneous Accessories | | | | |
| TOTAL PROJECT COST | | | | \$2,465,130 |

9 FINANCIAL ANALYSIS

This chapter describes the revenues and expenses incurred by the facility and presents a five-year pro-forma financial statement. It outlines the operational assumptions, revenues and expenses including staffing needs.

9.1 Operational Assumptions

The operational plan is based on certain presumptions regarding how the facility will be managed and operated. These assumptions are:

- The Visitor Centre will not charge a separate admission fee.
- Opening of the new facility will stimulate attendance to the Park
- The facility will open year round
- A 2% rate of growth is assumed
- Capital financing is assumed to be from sources other than debt and no depreciation is assumed since capital costs are expensed in the year in which they are incurred.
- Expenses related to insurance, etc. are covered in the overall Park budget.
- Average revenue for Nature and Gift Shop sales will increase.

- The existing Visitor Centre will continue to be used for other parks purposes (e.g. research centre).

9.2 Revenues

The new facility will have several potential revenue streams, specifically:

- Food Services
- Nature and Gift Shop
- Park Admissions
- Camping Related Revenue
- Meeting Room rentals
- Day Camps

The following sections describe the revenue opportunities and the assumption made to estimate revenue from each of the opportunities.

9.2.1 Food Services

It is assumed that food services will be generally the same level of service as currently exists at the Park, i.e. take-out with nearby seating.

Gross revenue from food services was \$213,000 in 2004. With 153,685 park visitors reported in 2004, the average revenue per park visitor was \$1.39. With incremental attendance attributable to the new Visitor Centre assumed to be 20,000, gross food service revenue is estimate at \$27,719 in the first year of operation. Cost of sales is assumed to be 40%.

9.2.2 Nature and Gift Shop

It is anticipated that Nature and Gift Shops sales will increase slightly, commensurate with the increased attendance to the park.

Gross revenue from the Nature and Gift Shop was \$30,000 in 2004. With 153,685 park visitors reported in 2004, the average revenue per park visitor was \$0.20. (Algonquin Park reports that an average of \$3.00 is spent at the Nature and Gift Shop by each visitor to the Visitor Centre but not all park visitors visit the Visitor Centre). With a better products and a broadened product offering (e.g. canoe rental, etc.) we have assumed that Nature and Gift Shop revenue per capita visitor can increase to \$0.40 per visitor. Gross Nature and Gift Shop revenue from both new visitors and increased average revenue from existing visitation is estimated at \$39,474 in the first year of operation. Cost of sales is assumed to be 50%.

9.2.3 Park Admission Fees

It is assumed that the average admission fee paid per incremental visitor is \$3.16. This was derived by dividing the \$12 vehicle fee by the average party size of 3.8. With an incremental 20,000 visitors, it is assumed that additional revenue would be \$63,158.

9.2.4 Camping Related Revenues

In addition to the park admission fees, some of the incremental visitors will camp within the park, purchase firewood, etc. In 2004, July/August campground occupancy was 63%, the lowest recorded in the seven years of available data (highest being 70% in 1998 and 1999).

Conservatively assuming the occupancy rate stays the same as 2004, revenue per campsite being \$25 per night and 2,072 incremental campsite nights, revenue from the incremental campers would be \$51,804.

9.2.5 Meeting Room Rentals

It is assumed that the facility can be booked for private functions/meetings 12 times per year at a cost of \$75 per use for a total revenue of \$900.

9.2.6 Day Camps

The new facility will have the capacity to host specialized day camps. Operating Day camps for area children (or seniors) can have many benefits for both the participant and the Park. One model is that the camps could be operated by the Municipality as a Parks and Recreation Camp. Although there are various ways in which the business model can be approached, it is assumed that there could be 20 days of camps (single days or multi-day camps), .15 “campers” per session for a total of 300 “campers”, and \$25 net revenue per “camper” per day for a total of \$7,500 in revenue.

9.3 Operational Expenses

The expenses of the new facility will include:

- Incremental staffing
- Utilities
 - Heat and Hydro
 - Water
 - Telephone and telecommunications
- Office supplies and printing
- Building maintenance
- Exhibit maintenance and development
- Administration and General

Each is discussed in the following sections.

9.3.1 Staffing

The Park currently operates with four full-time staff and 63 part-time and seasonal staff. Although the Natural Heritage Education Program will operate out of the Visitor Centre, development of the new centre will only require minor changes to the Park's staffing.

It is proposed that the Park Store Manager position be changed from seasonal to year round (0.5 FTE, assuming \$41,120 annual salary), the Natural Heritage Education Leader position be changed from seasonal to year round (0.5 FTE, assuming \$45,032 annual salary), and a full-time Maintenance position be created (1.0 FTE, assuming \$40,000 annual salary). Wages and benefits related to these positions are estimated to be \$93,045 in the first year. No allowance has been made for additional students or interpretive staff.

Interpretation activities would continue to be supported by the Friends of Rondeau Provincial Park with volunteers.

9.3.2 Utilities

An allowance has been made to cover the cost of utilities to be incurred by the facility. Utility costs were calculated based on the building size. The building is assumed to have a gross area of 10,725 sq. ft.

It is important to note that utility costs have escalated dramatically in recent years. The projections may not reflect market rates at the time of operation.

9.3.2.1 Heat and Hydro

Heat and hydro costs are assumed to be \$3.00 per sq. ft., totalling \$32,175 in the first year.

9.3.2.2 Water

Water costs are assumed to be \$500 in the first year.

9.3.2.3 Telephone and Telecommunications

Costs are assumed to be \$750 in the first year.

9.3.3 Office Supplies and Printing

Office supplies and printing expenses are assumed at \$1,000 in the first year.

9.3.4 Building Maintenance

Building maintenance expenses are assumed \$10,000 in the first year. This includes both housekeeping supplies and non-capital building repairs.

9.3.5 Exhibit Maintenance and Development

Building maintenance expenses are assumed at \$10,000 in the first year.

9.3.6 Administration and General

An allowance of \$10,000 starting Year One has been made for administrative and general expenses. This will include marketing and other expenses.

9.4 Financial Pro Forma

The following tables consolidate the financials for the new facility. With the assumptions described previously, the pro forma budget shows the effect of a new facility to be approximately break even (net income of \$2,260 for operations).

Figure 25, Financial Pro Forma Budget

| REVENUE | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--|------------------|------------------|------------------|------------------|------------------|
| Food Services | \$27,719 | \$28,273 | \$28,839 | \$29,416 | \$30,004 |
| Gift Shop Sales | \$39,474 | \$40,263 | \$41,069 | \$41,890 | \$42,728 |
| Park Admission | \$63,158 | \$64,421 | \$65,709 | \$67,024 | \$68,364 |
| Camping Related Revenue | \$51,804 | \$52,840 | \$53,897 | \$54,975 | \$56,074 |
| Meeting Room Rental | \$900 | \$918 | \$936 | \$955 | \$974 |
| Day Camps | \$7,500 | \$7,650 | \$7,803 | \$7,959 | \$8,118 |
| Gross Revenue | \$190,555 | \$194,366 | \$198,253 | \$202,219 | \$206,263 |
| EXPENSES | | | | | |
| Direct Cost of Sales | | | | | |
| Food Services | \$11,088 | \$11,309 | \$11,536 | \$11,766 | \$12,002 |
| Gift Shop Sales | \$19,737 | \$20,132 | \$20,534 | \$20,945 | \$21,364 |
| Incremental Wages and Benefits | \$93,045 | \$94,906 | \$96,804 | \$98,740 | \$100,715 |
| Heat and Hydro | \$32,175 | \$32,819 | \$33,475 | \$34,144 | \$34,827 |
| Water | \$500 | \$510 | \$520 | \$531 | \$541 |
| Telephone/ Communications | \$750 | \$765 | \$780 | \$796 | \$812 |
| Office Supplies and Printing | \$1,000 | \$1,020 | \$1,040 | \$1,061 | \$1,082 |
| Building Maintenance | \$10,000 | \$10,200 | \$10,404 | \$10,612 | \$10,824 |
| Exhibit Maintenance and Development | \$10,000 | \$10,200 | \$10,404 | \$10,612 | \$10,824 |
| Administration and General | \$10,000 | \$10,200 | \$10,404 | \$10,612 | \$10,824 |
| Gross Expenses | \$188,295 | \$192,061 | \$195,902 | \$199,820 | \$203,816 |
| Income (Loss) before interest, depreciation and taxes | \$2,260 | \$2,305 | \$2,352 | \$2,399 | \$2,447 |

10 ECONOMIC IMPACT

As a component of the project, the economic impact of a new visitor centre was calculated.

10.1 Economic Impact Model

Economic impact occurs in three ways: direct impacts, indirect impacts and induced impacts. *Direct impacts* are created through the direct purchase of goods or services, either for construction of the facility or expenditures for its operations. The subsequent re-spending of direct impacts (also known as “first round of expenditures”) create subsequent or “*secondary impacts*”. There are two types of secondary impacts: *indirect impacts* and *induced impacts*. The consumption of outputs from other businesses in the area creates production, hence business income, employment and personal income. *Indirect impacts* refer to the incremental income or employment created from supplying goods or services to the facility or events at the facility. The continued re-spending of direct and indirect impacts within the region creates *induced impacts*. This is a repetitive cycle with decreasing effect as a result of “leakage” outside of the region and other losses from the economy.

The Ontario government’s Tourism and Regional Economic Impact Model (TREIM) econometric model was used to estimate the economic impact of the project. This is an Input/Output based model that calculates the economic impact attributable to specific regions within the province and/or the whole province. The model provides an estimate of the economic impact that expenditures are expected to have on the regional and provincial economy, in terms of Gross Domestic Product, employment and taxes generated.

Three economic impact calculations were made for three types of expenditure “shocks” specifically:

- Capital Construction expenditures
- Visitors’ expenditures

➤ Operational expenditures

Capital construction impacts are one-time impacts, and the visitor spending and operational spending are annual impacts. All amounts are in 2006 dollars.

10.2 Economic Impact of the Visitor Centre

10.2.1 Economic Impact of Capital Construction

10.2.1.1 Capital Expenditure Assumptions

The capital expenditures by type are shown in the following table.

Figure 26, Capital Expenditure Inputs

| Type of Expenditure | Expenditure |
|---------------------------|--------------------|
| Buildings and Renovations | \$1,629,750 |
| Machinery and Equipment | \$405,000 |
| Furniture and Fixtures | \$300,000 |
| Transportation Equipment | \$0 |
| Other Supplies | \$0 |
| Other Services | \$130,380 |
| Total | \$2,465,130 |

10.2.1.2 Capital Expenditure Impacts

The capital expenditures to construct the new Visitor Centre is expected to increase GDP within Kent County by \$1,514,273, and another \$407,807 in the rest of Ontario. This increase will theoretically create 17 local jobs and another 5 elsewhere in the province, resulting in an incremental labour income of \$995,317 locally and \$249,212 elsewhere in the province.

The following table provides the details.

Figure 27, Economic Impact of Capital Expenditures

| | Kent County | Rest of Ontario | Total to Ontario |
|-------------------------------|--------------|-----------------|------------------|
| Total Investment | \$ 2,465,130 | | \$ 2,465,130 |
| Gross Domestic Product | | | |

| | Kent County | Rest of Ontario | Total to Ontario |
|--------------------------|---------------------|-------------------|--------------------|
| (GDP) | | | |
| Direct | \$ 979,492 | \$ 27,971 | \$1,007,463 |
| Indirect | \$ 147,828 | \$ 154,561 | \$302,389 |
| Induced | \$ 386,953 | \$ 225,276 | \$612,229 |
| Total | \$ 1,514,273 | \$ 407,807 | \$1,922,080 |
| Labour Income | | | |
| Direct | \$ 696,212 | \$ 16,122 | \$712,334 |
| Indirect | \$ 94,389 | \$ 98,855 | \$193,244 |
| Induced | \$ 204,716 | \$ 134,235 | \$338,951 |
| Total | \$ 995,317 | \$ 249,212 | \$1,244,529 |
| Employment (Jobs) | | | |
| Direct | 11 | 0 | 11 |
| Indirect | 2 | 2 | 4 |
| Induced | 4 | 3 | 7 |
| Total | 17 | 5 | 22 |
| Direct Taxes | | | |
| Federal | \$ 254,970 | \$ 5,602 | \$260,572 |
| Provincial | \$ 162,298 | \$ 2,550 | \$164,848 |
| Municipal | \$ 30,992 | \$ 1,070 | \$32,062 |
| Total | \$ 448,261 | \$ 9,222 | \$457,483 |
| Total Taxes | | | |
| Federal | \$ 373,031 | \$ 84,658 | \$457,689 |
| Provincial | \$ 242,499 | \$ 41,087 | \$283,586 |
| Municipal | \$ 71,095 | \$ 15,546 | \$86,641 |
| Total | \$ 686,625 | \$ 141,291 | \$827,916 |

Source: Ontario Ministry of Tourism's Ontario Tourism Regional Economic Impact Model.

The following table breaks down the impact of the expenditure on Kent County and the Rest of Ontario by type of industry.

Figure 28, Economic Impact of Capital Expenditures on GDP by Industry

| Industry | Impact on Kent County | | Impact on Rest of Ontario | |
|---|-----------------------|------------|---------------------------|------------|
| | Direct GDP | Total GDP | Direct GDP | Total GDP |
| Crop and Animal Production | \$ 0 | \$ 2,397 | \$ 0 | \$ 4,549 |
| Forestry and Logging | \$ 0 | \$ 560 | \$ 0 | \$ 886 |
| Fishing, Hunting and Trapping | \$ 0 | \$ 18 | \$ 0 | \$ 13 |
| Support Activities for Agriculture and forestry | \$ 0 | \$ 148 | \$ 0 | \$ 279 |
| Mining and Oil and Gas Extraction | \$ 0 | \$ 2,553 | \$ 0 | \$ 2,670 |
| Utilities | \$ 0 | \$ 16,692 | \$ 0 | \$ 7,426 |
| Construction | \$ 834,190 | \$ 879,501 | \$ 0 | \$ 9,754 |
| Manufacturing | \$ 6,363 | \$ 54,084 | \$ 5,432 | \$ 59,052 |
| Wholesale Trade | \$ 51 | \$ 30,072 | \$ 44 | \$ 41,553 |
| Retail Trade | \$ 0 | \$ 49,650 | \$ 0 | \$ 24,250 |
| Transportation and Warehousing | \$ 0 | \$ 10,509 | \$ 0 | \$ 21,358 |
| Information and Cultural Industries | \$ 1,102 | \$ 14,799 | \$ 1,059 | \$ 24,675 |
| Finance, Insurance, Real Estate and Renting and Leasing | \$ 24,775 | \$ 175,351 | \$ 12,971 | \$ 104,673 |
| Professional, Scientific and Technical Services | \$ 6,177 | \$ 28,985 | \$ 5,939 | \$ 40,116 |
| Administrative and Other Support Services | \$ 2,627 | \$ 14,536 | \$ 2,526 | \$ 17,232 |
| Education Services | \$ 0 | \$ 1,357 | \$ 0 | \$ 869 |
| Health Care and Social Assistance | \$ 0 | \$ 14,980 | \$ 0 | \$ 3,902 |
| Arts, Entertainment and Recreation | \$ 0 | \$ 5,066 | \$ 0 | \$ 3,825 |
| Accommodation and Food Services | \$ 0 | \$ 11,596 | \$ 0 | \$ 11,702 |
| Other Services (Except Public Administration) | \$ 0 | \$ 11,340 | \$ 0 | \$ 7,986 |
| Operating, Office, Cafeteria, and Laboratory Supplies | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Travel & Entertainment, Advertising & Promotion | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Transportation Margins | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Non-Profit Institutions Serving Households | \$ 0 | \$ 11,321 | \$ 0 | \$ 2,895 |

| Industry | Impact on Kent County | | Impact on Rest of Ontario | |
|-------------------|-----------------------|---------------------|---------------------------|-------------------|
| | Direct GDP | Total GDP | Direct GDP | Total GDP |
| Government Sector | \$ 0 | \$ 15,369 | \$ 0 | \$ 9,163 |
| Indirect Taxes | \$ 104,208 | \$ 163,390 | \$ 0 | \$ 8,978 |
| Total | \$ 979,492 | \$ 1,514,273 | \$ 27,971 | \$ 407,807 |

Source: Ontario Ministry of Tourism's Ontario Tourism Regional Economic Impact Model.

10.2.2 Economic Impact of Incremental Operations

In this section, we present the estimated economic impacts resulting from: 1) incremental visitor spending and 2) operational spending attributable to the new Visitor Centre.

10.2.2.1 Incremental Tourist Expenditure Assumptions

It is assumed that the new Visitor Centre will attract an incremental visitation of 20,000. The distribution of the incremental visitation by origin and length of stay is shown on the following table.

Figure 29, Assumed Incremental Visitors by Origin and Length of Stay

| Origin | Same Day | | Overnight | |
|----------------|--------------------------|-----------------------------|-----------------------------|---------------------------------|
| | Total Number of Visitors | Percent of Visitors' Origin | Percent of Visitors' Origin | Average Length of Stay (nights) |
| Ontario | 17,000 | 88% | 12% | 4 |
| Rest of Canada | 2,000 | 80% | 20% | 4 |
| USA | 1,000 | 50% | 50% | 4 |
| Overseas | 0 | 0% | 0% | 0 |
| Total | 20,000 | | | |

Although the breakdown of visitor expenditures is not known, we are able to calculate a typical breakdown based on Statistics Canada's 2002 Canadian Travel Survey and the International Travel Survey. The following table shows the assumed breakdown of visitors' expenditures.

Figure 30, Assumed Distribution of Tourist Expenditures

| Expenditure Type | Estimated Expenditure |
|---------------------------------------|-----------------------|
| Travel Services | \$0 |
| Public Transportation | \$155,562 |
| Private Transportation - Rental | \$15,306 |
| Private Transportation - Operation | \$340,975 |
| Local Transportation | \$5,120 |
| Accommodation | \$191,786 |
| Food & Beverage - At Stores | \$148,396 |
| Food & Beverage - At Restaurants/Bars | \$285,462 |
| Recreation & Entertainment | \$176,350 |
| Retail - Clothing | \$105,464 |
| Retail - Other | \$66,362 |
| Total | \$1,490,783 |

Source: TREIM calculation based on Statistics Canada's 2002 Canadian Travel Survey and the International Travel Survey.

10.2.2.2 Incremental Operational Expenditure Assumptions

The Visitor Centre's operational expenditures are shown in the following table.

Figure 31, Visitor Centre's Operational Expenditure Inputs

| Facility (operation) type | Recreation & Entertainment |
|--|----------------------------|
| Number of Jobs | 2 |
| Cost of goods sold | |
| Food products | \$11,088 |
| Alcoholic beverages | \$0 |
| All other merchandise | \$19,737 |
| Other operating expenses | |
| Office and all other supplies | \$0 |
| Salaries, wages | \$93,045 |
| Commission paid | \$0 |
| Employee benefits | \$0 |
| Sub-contract laundry, cleaning and maintenance | \$0 |
| Legal, accounting and other professional fees | \$0 |
| Marketing, advertising and promotion | \$1,000 |

| Facility (operation) type | Recreation & Entertainment |
|---|----------------------------|
| Travel (transportation, accommodation, food, entertainment) | \$0 |
| Rent or lease | \$0 |
| Repair and maintenance | \$20,000 |
| Insurance | \$0 |
| Heat, light, power and water | \$32,675 |
| Telephone, fax and internet fees | \$750 |
| Depreciation | \$0 |
| Royalties and franchise fees | \$0 |
| Property tax and business tax, licenses and permits | \$0 |
| All other operating expenses | \$10,000 |
| <i>Non operating expenses</i> | |
| Interest expenses | \$0 |
| Sales Taxes | \$0 |
| Total operating expenses | \$188,295 |

Source: Milestone Strategy calculations.

10.2.2.3 Incremental Tourist and Operational Expenditure Impacts

The incremental operational expenditures and incremental tourists' expenditures will increase GDP within Kent County by \$1,178,852, and another \$425,623 in the rest of Ontario. This increase will theoretically create 18 local jobs and another 5 elsewhere in the province, resulting in an incremental labour income of \$639,630 locally and \$259,971 elsewhere in the province.

The following table provides the details.

Figure 32, Economic Impact of Incremental Tourist and Operational Expenditures

| | Kent County | | | Rest of Ontario | | | Total to Ontario | | |
|--------------------------|-------------------------------|---------------------------------|--------------|-------------------------------|---------------------------------|--------------|-------------------------------|---------------------------------|--------------|
| | Visitors' Expenditures | Operational Expenditures | Total | Visitors' Expenditures | Operational Expenditures | Total | Visitors' Expenditures | Operational Expenditures | Total |
| Total Investment | \$ 1,490,783 | \$ 188,295 | \$1,679,078 | | | | \$1,490,783 | \$188,295 | \$1,679,078 |
| GDP | | | | | | | | | |
| Direct | \$ 715,095 | \$ 96,274 | \$811,369 | \$ 91,781 | \$ 3,610 | \$95,391 | \$806,876 | \$99,884 | \$906,760 |
| Indirect | \$ 110,824 | \$ 10,566 | \$121,390 | \$ 132,871 | \$ 4,575 | \$137,446 | \$243,695 | \$15,141 | \$258,836 |
| Induced | \$ 195,713 | \$ 50,380 | \$246,093 | \$ 170,028 | \$ 22,758 | \$192,786 | \$365,741 | \$73,138 | \$438,879 |
| Total | \$ 1,021,633 | \$ 157,219 | \$1,178,852 | \$ 394,680 | \$ 30,943 | \$425,623 | \$1,416,313 | \$188,162 | \$1,604,475 |
| Labour Income | | | | | | | | | |
| Direct | \$ 341,207 | \$ 94,943 | \$436,150 | \$ 60,390 | \$ 2,268 | \$62,658 | \$401,597 | \$97,211 | \$498,808 |
| Indirect | \$ 66,478 | \$ 6,842 | \$73,320 | \$ 81,850 | \$ 2,874 | \$84,724 | \$148,328 | \$9,716 | \$158,044 |
| Induced | \$ 103,324 | \$ 26,836 | \$130,160 | \$ 98,727 | \$ 13,861 | \$112,588 | \$202,051 | \$40,697 | \$242,748 |
| Total | \$ 511,010 | \$ 128,620 | \$639,630 | \$ 240,968 | \$ 19,003 | \$259,971 | \$751,978 | \$147,623 | \$899,601 |
| Employment (Jobs) | | | | | | | | | |
| Direct | 12 | 2 | 14 | 1 | 0 | 1 | 13 | 2 | 15 |
| Indirect | 1 | 0 | 1 | 2 | 0 | 2 | 3 | 0 | 3 |
| Induced | 2 | 1 | 3 | 2 | 0 | 2 | 4 | 1 | 5 |
| Total | 15 | 3 | 18 | 5 | 0 | 5 | 20 | 3 | 23 |

| | Kent County | | | Rest of Ontario | | | Total to Ontario | | |
|---------------------|------------------------|--------------------------|-----------|------------------------|--------------------------|-----------|------------------------|--------------------------|-----------|
| | Visitors' Expenditures | Operational Expenditures | Total | Visitors' Expenditures | Operational Expenditures | Total | Visitors' Expenditures | Operational Expenditures | Total |
| Direct Taxes | | | | | | | | | |
| Federal | \$ 214,366 | \$ 23,053 | \$237,419 | \$ 19,113 | \$ 723 | \$19,836 | \$233,479 | \$23,776 | \$257,255 |
| Provincial | \$ 183,022 | \$ 6,549 | \$189,571 | \$ 8,141 | \$ 286 | \$8,427 | \$191,163 | \$6,835 | \$197,998 |
| Municipal | \$ 10,030 | \$ 94 | \$10,124 | \$ 1,864 | \$ 57 | \$1,921 | \$11,894 | \$151 | \$12,045 |
| Total | \$ 407,418 | \$ 29,696 | \$437,114 | \$ 29,117 | \$ 1,067 | \$30,184 | \$436,535 | \$30,763 | \$467,298 |
| Total Taxes | | | | | | | | | |
| Federal | \$ 281,159 | \$ 36,811 | \$317,970 | \$ 82,551 | \$ 6,399 | \$88,950 | \$363,710 | \$43,210 | \$406,920 |
| Provincial | \$ 227,222 | \$ 16,434 | \$243,656 | \$ 41,344 | \$ 3,006 | \$44,350 | \$268,566 | \$19,440 | \$288,006 |
| Municipal | \$ 31,949 | \$ 5,215 | \$37,164 | \$ 15,437 | \$ 1,075 | \$16,512 | \$47,386 | \$6,290 | \$53,676 |
| Total | \$ 540,330 | \$ 58,459 | \$598,789 | \$ 139,332 | \$ 10,480 | \$149,812 | \$679,662 | \$68,939 | \$748,601 |

Source: Ontario Ministry of Tourism's Ontario Tourism Regional Economic Impact Model.

The following table breaks down the impact of the incremental visitor expenditures on Kent County and the Rest of Ontario by type of industry.

Figure 33, Economic Impact of Incremental Visitor Expenditures on GDP by Industry

| Industry | Impact on Kent County | | Impact on Rest of Ontario | |
|---|-----------------------|------------|---------------------------|-----------|
| | Direct GDP | Total GDP | Direct GDP | Total GDP |
| Crop and Animal Production | \$ 2,111 | \$ 3,698 | \$ 2,373 | \$ 6,227 |
| Forestry and Logging | \$ 0 | \$ 97 | \$ 0 | \$ 483 |
| Fishing, Hunting and Trapping | \$ 49 | \$ 71 | \$ 22 | \$ 39 |
| Support Activities for Agriculture and forestry | \$ 0 | \$ 99 | \$ 0 | \$ 238 |
| Mining and Oil and Gas Extraction | \$ 0 | \$ 407 | \$ 0 | \$ 913 |
| Utilities | \$ 0 | \$ 15,881 | \$ 0 | \$ 8,102 |
| Construction | \$ 0 | \$ 26,401 | \$ 0 | \$ 11,356 |
| Manufacturing | \$ 17,315 | \$ 36,768 | \$ 23,481 | \$ 59,309 |
| Wholesale Trade | \$ 13,926 | \$ 25,347 | \$ 15,966 | \$ 38,237 |
| Retail Trade | \$ 63,156 | \$ 90,588 | \$ 0 | \$ 19,179 |
| Transportation and Warehousing | \$ 73,816 | \$ 87,146 | \$ 41,314 | \$ 67,403 |
| Information and Cultural Industries | \$ 3,350 | \$ 12,265 | \$ 754 | \$ 19,637 |
| Finance, Insurance, Real Estate and Renting and Leasing | \$ 7,800 | \$ 100,777 | \$ 0 | \$ 80,121 |
| Professional, Scientific and Technical Services | \$ 0 | \$ 8,481 | \$ 0 | \$ 18,905 |
| Administrative and Other Support Services | \$ 0 | \$ 6,480 | \$ 0 | \$ 9,796 |
| Education Services | \$ 0 | \$ 769 | \$ 0 | \$ 659 |
| Health Care and Social Assistance | \$ 0 | \$ 8,447 | \$ 0 | \$ 3,875 |
| Arts, Entertainment and Recreation | \$ 70,276 | \$ 73,601 | \$ 179 | \$ 3,537 |
| Accommodation and Food Services | \$ 201,667 | \$ 210,595 | \$ 7,692 | \$ 18,267 |
| Other Services (Except Public Administration) | \$ 874 | \$ 8,170 | \$ 0 | \$ 7,102 |
| Operating, Office, Cafeteria, and Laboratory Supplies | \$ 0 | \$ 0 | \$ 0 | \$ 0 |

| Industry | Impact on Kent County | | Impact on Rest of Ontario | |
|---|-----------------------|---------------------|---------------------------|-------------------|
| | Direct GDP | Total GDP | Direct GDP | Total GDP |
| Travel & Entertainment, Advertising & Promotion | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Transportation Margins | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Non-Profit Institutions Serving Households | \$ 419 | \$ 6,409 | \$ 0 | \$ 2,931 |
| Government Sector | \$ 8,118 | \$ 16,365 | \$ 0 | \$ 7,291 |
| Indirect Taxes | \$ 252,218 | \$ 282,771 | \$ 0 | \$ 11,074 |
| Total | \$ 715,095 | \$ 1,021,633 | \$ 91,781 | \$ 394,680 |

Source: Ontario Ministry of Tourism's Ontario Tourism Regional Economic Impact Model.

The following table breaks down the impact of incremental operational expenditures on Kent County and the Rest of Ontario by type of industry.

Figure 34, Economic Impact of Incremental Operational Expenditures on GDP by Industry

| Industry | Impact on Kent County | | Impact on Rest of Ontario | |
|---|-----------------------|-----------|---------------------------|-----------|
| | Direct GDP | Total GDP | Direct GDP | Total GDP |
| Crop and Animal Production | \$ 323 | \$ 495 | \$ 381 | \$ 719 |
| Forestry and Logging | \$ 0 | \$ 15 | \$ 0 | \$ 45 |
| Fishing, Hunting and Trapping | \$ 1 | \$ 3 | \$ 0 | \$ 2 |
| Support Activities for Agriculture and forestry | \$ 0 | \$ 11 | \$ 0 | \$ 20 |
| Mining and Oil and Gas Extraction | \$ 0 | \$ 54 | \$ 0 | \$ 74 |
| Utilities | \$ 0 | \$ 2,532 | \$ 0 | \$ 585 |
| Construction | \$ 0 | \$ 5,830 | \$ 0 | \$ 571 |
| Manufacturing | \$ 1,721 | \$ 3,920 | \$ 1,212 | \$ 4,169 |
| Wholesale Trade | \$ 1,065 | \$ 2,915 | \$ 1,210 | \$ 3,543 |
| Retail Trade | \$ 0 | \$ 7,347 | \$ 0 | \$ 2,206 |
| Transportation and Warehousing | \$ 0 | \$ 1,435 | \$ 0 | \$ 2,021 |
| Information and Cultural Industries | \$ 117 | \$ 1,807 | \$ 128 | \$ 2,230 |

| Industry | Impact on Kent County | | Impact on Rest of Ontario | |
|---|-----------------------|-------------------|---------------------------|------------------|
| | Direct GDP | Total GDP | Direct GDP | Total GDP |
| Finance, Insurance, Real Estate and Renting and Leasing | \$ 0 | \$ 18,920 | \$ 0 | \$ 7,406 |
| Professional, Scientific and Technical Services | \$ 0 | \$ 1,445 | \$ 0 | \$ 1,851 |
| Administrative and Other Support Services | \$ 0 | \$ 1,089 | \$ 0 | \$ 890 |
| Education Services | \$ 0 | \$ 168 | \$ 0 | \$ 81 |
| Health Care and Social Assistance | \$ 0 | \$ 1,942 | \$ 0 | \$ 285 |
| Arts, Entertainment and Recreation | \$ 93,045 | \$ 93,740 | \$ 676 | \$ 996 |
| Accommodation and Food Services | \$ 0 | \$ 1,740 | \$ 0 | \$ 1,310 |
| Other Services (Except Public Administration) | \$ 0 | \$ 1,573 | \$ 0 | \$ 654 |
| Operating, Office, Cafeteria, and Laboratory Supplies | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Travel & Entertainment, Advertising & Promotion | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Transportation Margins | \$ 0 | \$ 0 | \$ 0 | \$ 0 |
| Non-Profit Institutions Serving Households | \$ 0 | \$ 1,508 | \$ 0 | \$ 200 |
| Government Sector | \$ 2 | \$ 1,463 | \$ 2 | \$ 684 |
| Indirect Taxes | \$ 0 | \$ 7,268 | \$ 0 | \$ 400 |
| Total | \$ 96,274 | \$ 157,219 | \$ 3,610 | \$ 30,943 |

Source: Ontario Ministry of Tourism's Ontario Tourism Regional Economic Impact Model.

11 IMPLEMENTATION PLAN

The chart on the following page indicates the steps for implementation of the project. Due to the uncertain timing, regulatory approvals such as an Environmental Assessment are not shown in the table. It is assumed that an Environmental Assessment will be undertaken before the Implementation Plan begins.

Figure 35, Implementation Plan

| | Phase One –Planning | Phase Two – Design | Phase Three – Construction | Phase Four – Operations |
|---------------------------------------|---|--|---|--|
| Timing | 0-6 Months | 6-12 months | 12-24 months | 2 years and beyond |
| General | <ul style="list-style-type: none"> • Assign Project Manager | • | • | • |
| Finance | <ul style="list-style-type: none"> • Identify financing and other partnerships • Secure commitment from all funders and partners • Define project budget | • | <ul style="list-style-type: none"> • Program payments • Prepare operational budget | • |
| Site Selection and Development | <ul style="list-style-type: none"> • Confirm site servicing | <ul style="list-style-type: none"> • Servicing plan | <ul style="list-style-type: none"> • Building servicing • Site landscaping after building | • |
| Facility Concept and Design | <ul style="list-style-type: none"> • Confirm spatial requirements and development program • Prepare architect RFP • Hire architect | <ul style="list-style-type: none"> • Identify and evaluate building design options • Building design • Prepare working drawings/ tender package • Tender and award building contract | <ul style="list-style-type: none"> • Hire general contractor • Construction • Ongoing site inspections and meetings • Project acceptance subject to deficiency list • Deficiency reporting and rectification | <ul style="list-style-type: none"> • Occupancy • Install additional furnishing and equipment • As built drawings completed and filed • Warranty checks • Ongoing operation and maintenance • Completion report |

| | Phase One –Planning | Phase Two – Design | Phase Three – Construction | Phase Four – Operations |
|-----------------------|---|--|---|---|
| Timing | 0-6 Months | 6-12 months | 12-24 months | 2 years and beyond |
| Exhibit Design | <ul style="list-style-type: none"> • Finalize exhibit themes • Design exhibits to enable calculation of building requirements | <ul style="list-style-type: none"> • Commission exhibit design and construction | <ul style="list-style-type: none"> • Installation of exhibits | <ul style="list-style-type: none"> • Monitor use and success |
| Programming | <ul style="list-style-type: none"> • Conceptualize programming from the facility (e.g. Day camps?) | <ul style="list-style-type: none"> • Prepare programming plan • Confirm staffing needs | <ul style="list-style-type: none"> • Marketing and promotion • Staff hiring | <ul style="list-style-type: none"> • Detailed program planning • Program delivery |

APPENDICES

APPENDIX A

PROFILE OF OTHER

VISITOR CENTRES

Figure 36, Profile of Other Visitor Centres

| | Facility Description and Web Site | Facility Size | Operating Details and Programming | Attendance and Market Profile |
|---|--|---|---|--|
| Existing Rondeau Park Visitor Centre | <ul style="list-style-type: none"> • Stand alone facility, centrally located in Park • opened in 1963 • Not originally designed for year round use, subsequently refurbished but not energy efficient • Isolated from other park amenities | <ul style="list-style-type: none"> • 5,000 ft² • Performance area seats approximately 30-40 | <ul style="list-style-type: none"> • Open year round with reduced hours (generally just weekends) from Labour Day to March 31. • Admission - Free with Park Pass • | |
| Algonquin Park Visitor Centre | <ul style="list-style-type: none"> • Stand alone facility within west park gates, not physically related to any other park amenity or attraction. • Located centrally in park • Opened in 1993 | <ul style="list-style-type: none"> • 28-30,000 ft² • Capital replacement cost - \$15,000,000 • Theatre seats 125-130; never more than 50-70 used, usually 30-40. • Exhibits are 90% static | <ul style="list-style-type: none"> • Open year round • Admission - Free with Park Pass • Generally static programming (e.g. exhibits, art gallery, etc.) | <ul style="list-style-type: none"> • 220,000 to 225,000 average annual attendance • 29% are Algonquin Park day users • 23% originate from GTA, 40% from elsewhere in Ontario • More than 300 motor coach tours annually (100 of which are during the Fall) |
| Point Pelee Visitor Centre | <ul style="list-style-type: none"> • Stand alone facility within west park gates, not physically related to any other park amenity or attraction. • Opened in 1968, recently renovated | <ul style="list-style-type: none"> • 8,100 ft² • Theatre | <ul style="list-style-type: none"> • Visitor Centre free with Park admission • Park Admission – Adults-\$6 Students/Youth-\$3 Children under 5- free • No single camping available | <ul style="list-style-type: none"> • approximately 200,000 average attendance to Visitor Centre • approximately 270,000 annual attendance to Park • 69% from Ontario • 27% US |

| | Facility Description and Web Site | Facility Size | Operating Details and Programming | Attendance and Market Profile |
|--|--|---|--|--|
| Killbear Provincial Park Visitor Centre | <ul style="list-style-type: none"> • http://www.parkscanada.pch.gc.ca/pn-np/on/pelee/index_e.asp • Recently completed • Will open to public in 2006 | <ul style="list-style-type: none"> • 9,300 ft² | <ul style="list-style-type: none"> • on-site (only group camping by reservation) • Most interpretive Programs have specific fees • Will be open seasonally • Admission - Free with Park Pass | <ul style="list-style-type: none"> • 4% other |
| French River/ Canadian Heritage River Landmark Centre | <ul style="list-style-type: none"> • Proposed, unbuilt | <ul style="list-style-type: none"> • 12,500 ft² • Exhibit Hall (4,500 ft²) • Restaurant (4,500 ft²) • Nature and Gift Shop (4,500 ft²) • Gallery (4,500 ft²) • Common Area/ Other (4,500 ft²) • Theatre 50-75 capacity | <ul style="list-style-type: none"> • | <ul style="list-style-type: none"> • |
| Presquille Provincial Park Lighthouse Interpretive Centre | <ul style="list-style-type: none"> • Lighthouse Interpretive Centre constructed in 1996 | <ul style="list-style-type: none"> • approximately 3,500 ft² • Capital cost - \$350,000 (construction) \$300,000 (exhibits) • 60% of space is interpretive (Gallery, audio-visual display, theatre (35-40 capacity)) | <ul style="list-style-type: none"> • Open July & Aug – 7 days/wk Shoulder season – weather permitting Winter – rarely (weather dependent) • Admission - Free with Park Pass | <ul style="list-style-type: none"> • approximately 35,000 average attendance to Visitor Centre (200,000 to park) |
| Sainte-Marie Among the Hurons, | <ul style="list-style-type: none"> • Central interpretive facility within recreation of 17th century French Jesuit | <ul style="list-style-type: none"> • 10,000 ft² • Capital cost - \$10,000,000 | <ul style="list-style-type: none"> • Seasonal operation from May to October • Admission – | <ul style="list-style-type: none"> • 175 to 200,000 average annual attendance • approx 100,000 via motor |

| | Facility Description and Web Site | Facility Size | Operating Details and Programming | Attendance and Market Profile |
|--|--|---|---|---|
| Midland | <p>mission headquarters and interaction of the French and native Wendat Huron nation.</p> <ul style="list-style-type: none"> • 1 hectare site • Opened in 1970 • http://www.saintemarieamongthehurons.on.ca | <ul style="list-style-type: none"> • Restaurant and Nature and Gift Shop | <p>Adults-\$10-\$12 Students/Youth-\$9 Children under 5- free</p> <ul style="list-style-type: none"> • Generally static programming (e.g. exhibits, art gallery, etc.) • Extensive Educational and Interpretive Program | <p>coach and 50,000 to 6-,000 general public</p> |
| Wye Marsh Wildlife Centre | <ul style="list-style-type: none"> • Main facility within 150 acre marsh. • Built with same architectural plans as Point Pelee Visitor Centre • Opened in 1969 • Designated as an Important Bird Area • http://www.wyemarsh.com/ | <ul style="list-style-type: none"> • approximately 6,000 ft² | <ul style="list-style-type: none"> • Open year round • Admission - Adults-\$6.50 Students/Youth-\$5.50 Children under 3- free • Indoor exhibits support extensive outdoor trails and programming, floating boardwalk, observation tower • wildlife viewing, guided and self-guided walks on 8 km of trails • numerous festivals and events | <ul style="list-style-type: none"> • 35,000 average annual attendance • 43% educational/ school groups • 40% tourists • 17% events and programs • Primarily draw from Simcoe County and seasonal residents |
| Niagara Fall Butterfly Conservatory | <ul style="list-style-type: none"> • Niagara Parks Commission attraction located along Niagara River Parkway . • Opened in 1996 • http://www.niagaraparks.com/nature/butterfly.php | <ul style="list-style-type: none"> • 35,000 ft² • Conservatory-11,000 ft² • Exhibit Gallery and Storage-10,000 ft² • Capital cost - \$13,000,000 | <ul style="list-style-type: none"> • Open year round • Admission - Adults-\$11 Students/Youth-\$6.50 Children under 5- free | <ul style="list-style-type: none"> • 600,000 average annual attendance • 84% tourists • 11% school groups • 5% other |

