

Town of Innisfil Tourism Strategy

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Prepared by: KLB Consulting
Prepared for: Town of Innisfil



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Acknowledgements

The Town of Innisfil acknowledges that Innisfil is situated on Treaty land that is steeped in rich Indigenous history. The Town also acknowledges that this land is the Traditional Territories of the First Peoples of Turtle Island. It is shared between the Anishinaabe peoples of Beausoleil First Nation, Chippewas of Rama First Nation, and Chippewas of Georgina Island First Nation and we thank them for generations of stewardship.

This meeting place is still the home to many Indigenous people and (as settlers) we are grateful to have the opportunity to work on this land.

The Town acknowledges the forced sacrifices that are the foundation of Canadian society today. We are dedicated to honouring Indigenous history and culture and committed to moving forward in the spirit of reconciliation and respect with all First Nation, Métis, and Inuit.

This Tourism Strategy is the result of a collaborative, community-informed process that engaged residents, tourism operators, business owners, community organizations, regional partners, post-secondary institutions, and municipal staff. The Town of Innisfil sincerely thanks everyone who contributed their time, insights, and perspectives through surveys, interviews, and engagement sessions. The feedback shared throughout this process was essential in shaping a Strategy that reflects the community's local priorities, opportunities, and aspirations.

We would also like to thank the internal project steering committee including Bill Sullivan, former Chief Executive Officer, Regional Tourism Organization 7: BruceGreySimcoe, Kim Clarke, Interim Chief Executive Officer of Regional Tourism Organization 7: BruceGreySimcoe, Amber Elliot, Economic Development Champion, and Laura Thompson, Manager of Economic Development, Town of Innisfil, for providing leadership, guidance, and expertise throughout the development of this strategy. Their insights helped ensure the Strategy is grounded in both community values and capacity, while encouraging Regional collaboration.

The Town of Innisfil recognizes the importance of taking a more active and coordinated leadership role in tourism development. This strategy reflects a shift toward intentional planning, collaboration, and stewardship, positioning tourism as a tool to support local businesses, enhance community well-being, and contribute to long-term economic prosperity. The Town is committed to advancing this strategy over the next five years, recognizing that implementation will depend on continued investment in staff capacity and resources for tourism development.

The Town of Innisfil would like to thank the Province of Ontario and the Regional Tourism Organization 7: BruceGreySimcoe for their funding contributions to this project. The views, findings, and recommendations expressed in this document do not necessarily reflect the views of RTO7 or the Province of Ontario.

Disclaimer

KL Branding & Consulting Ltd. (KLB) has prepared this report in accordance with its engagement to develop a Tourism Strategy and Asset Map for the Town of Innisfil. This strategy has been informed by community engagement, industry consultations, municipal staff input, and relevant tourism data and research.

The recommendations presented in this report are intended to support thoughtful, achievable, and future-focused strategic directions that strengthen Innisfil's tourism economy, enhance visitor experiences, and align with the Town's broader economic and community development objectives.

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The analyses contained herein are provided as of February 2026. KLB disclaims any undertaking or obligation to advise any person of any change in facts, conditions, or circumstances that may arise after the date of this report. In the event of material changes affecting the assumptions or context of this analysis, KLB reserves the right to amend, modify, or withdraw its findings.

Observations and recommendations are based on economic, market, policy, and tourism industry conditions prevailing at the time of preparation. The analyses rely on assumptions regarding industry performance, visitor behaviour, economic trends, and regulatory environments, many of which are beyond KLB's control, including government policy and broader economic conditions.

No legal opinion or interpretation is provided within this report. It is assumed that appropriate legal, financial, or other professional advice has been or will be obtained where required. KLB assumes no responsibility for matters requiring such professional expertise.

This tourism strategy should be considered in its entirety. Selection or reliance upon isolated sections without consideration of the full context may result in a misleading interpretation of the findings and recommendations. Should any of the key assumptions or information provided to KLB prove inaccurate, the conclusions and strategic recommendations outlined herein may require revision.



Town of Innisfil Tourism Strategy at a Glance

PURPOSE

Provide clear direction for how the Town of Innisfil could proactively support, strengthen and steward the growth of the local tourism industry over the next five years.

VISION

Innisfil is recognized as a welcoming, four-season destination where visitors experience the Town's vast waterfront, unique small-town communities, and local culture in ways that support local businesses, respect residents, and contribute to long-term community economic prosperity.

GUIDING PRINCIPLES

Community First
Stewardship and Sustainability
Tourism as an Economic Driver
Ecosystem-Wide Collaboration
Authenticity
Inclusive Opportunity
Evidence-Informed Decision-Making

THE STRATEGIC FRAMEWORK

Tourism development in Innisfil over the next five years will be guided by three interconnected priorities:

- Capacity Building:** Strengthening leadership, coordination, workforce readiness, and data to support long-term tourism development.
- Development:** Enhancing and connecting visitor experiences to increase visitation, extend stays, and grow economic impact.
- Stewardship:** Ensuring tourism growth is balanced, sustainable, community-aligned, and integrated into municipal planning.



FOCUS, OUTCOMES & GOALS

CAPACITY BUILDING	DEVELOPMENT	STEWARDSHIP
<p>Focus: Internal leadership, workforce, data, business readiness</p> <p>Outcomes: Coordinated tourism system</p>	<p>Focus: Experience enhancement, collaboration, overnight accommodation growth</p> <p>Outcomes: Increased visitor impact</p>	<p>Focus: Planning integration, community alignment, sustainability</p> <p>Outcomes: Balanced long-term growth</p>



GOALS AT A GLANCE

CAPACITY BUILDING



Goal 1: Strengthen Municipal Tourism Leadership, Operational Governance, and Performance Management



Goal 2: Strengthen Tourism Workforce, Business Readiness, and Industry Collaboration

DEVELOPMENT



Goal 3: Build a Connected, Visitor-Ready Tourism Destination



Goal 4: Improve Conditions for Overnight Stays and Extended Visitation

STEWARDSHIP



Goal 5: Establish a Clear and Shared Tourism Identity and Direction



Goal 6: Enable Sustainable Tourism Growth that Benefits the Community

WHY THIS TOURISM STRATEGY MATTERS NOW

Tourism in Innisfil is already active and evolving. The Town benefits from significant visitor draw tied to Lake Simcoe, Friday Harbour, Gateway Casino, Tanger Outlets, sport facilities, and growing culinary and agritourism offerings. At the same time, visitation remains largely seasonal and day-trip focused, infrastructure gaps limit overnight stays, and tourism coordination is currently embedded within broader municipal functions. As Innisfil continues to grow, a more structured and intentional approach to tourism is required to ensure economic opportunity is realized while protecting community well-being and environmental assets.

WHAT THIS TOURISM STRATEGY PROPOSES

This Strategic Plan addresses the need for clearer direction, coordination, and long-term planning through the creation of a formalized and dedicated tourism portfolio. It moves beyond a primarily marketing-led approach toward a destination management framework that strengthens internal capacity, improves collaboration among operators and regional partners, and aligns tourism with municipal planning and infrastructure decisions. By identifying gaps in accommodation, mobility, workforce readiness, and visitor experience packaging, the strategy provides a realistic roadmap to strengthen Innisfil's tourism system rather than relying on ad hoc growth.



WHAT COULD CHANGE OVER THE NEXT FIVE YEARS

Over the next five years, Innisfil has the opportunity to transition their tourism industry from a collection of individual assets to a more coordinated and managed destination system. If provided with an increase in staff capacity, Innisfil's Economic Development department will be able to clarify tourism leadership, explore sustainable funding tools, support experience development and workforce pathways, and integrate tourism considerations more fully into planning and stewardship decisions. The result will be a more connected, four-season visitor economy that generates economic benefits while remaining balanced with resident priorities and long-term sustainability goals. Without the direct investment in staffing capacity, the Town of Innisfil runs the risk of leaving a substantial economic opportunity on the table.

Introduction

Located along the shores of Lake Simcoe and within an hour of the Greater Toronto Area along the Highway 400 corridor, the Town of Innisfil has experienced steady growth in tourism activity over the past decade. Recognizing this momentum, the Town's 2024–2026 Economic Development Strategic Plan identified tourism as a key economic pillar with significant opportunity for further development.

In recent years, the Town has strengthened its role in supporting tourism and cultural activity through enhanced marketing initiatives, improved data collection, and closer collaboration with county and regional partners. Programs such as Discover Lakeside Dining, the Cookstown Placemaking Event and the community engagement achieved through Innisfil's first Tourism Summit reflect a growing municipal role in shaping and supporting the visitor economy. As activity has increased, so too has the need for clearer direction, coordination, and long-term planning.

This tourism strategy responds to that need. It builds upon previous municipal planning, including the 2017 Tourism Destination Management Plan and the Economic Development Strategic Plan, and reflects current market conditions, community growth, and evolving visitor expectations. The Strategy sets direction for how tourism will be coordinated, supported, and managed in Innisfil, in alignment with broader municipal priorities.

Organized around three pillars, **Capacity Building, Development, and Stewardship**, the tourism strategy focuses on strengthening internal coordination, improving visitor experiences, and guiding tourism growth in a way that reflects community priorities and environmental responsibility. A detailed implementation plan provides a framework with practical actions, timelines, and measurable outcomes to guide the Town's work over the next five years.

Over the next five years, the tourism strategy proposes to:

- Clarify Innisfil's tourism identity and direction
- Strengthen collaboration among local operators and regional partners
- Support experience development and extended visitation
- Improve internal coordination and data-informed decision-making
- Align tourism considerations with municipal planning and infrastructure decisions

The Asset Mapping portion of this project provides a comprehensive inventory of Innisfil's tourism-related assets and sets the analytical framework for this Strategy. By establishing these baseline conditions, we were able to identify community strengths, recognize asset clusters, and pinpoint existing gaps, ensuring all recommendations are firmly grounded in the town's current resources. Assets reviewed include natural features, waterfront amenities, attractions, recreation infrastructure, agritourism operations, events, commercial areas, and supporting services.

**TOURIST ARE ALREADY
COMING TO INNISFIL:**

685,413

unique visitors across the
primary destination hubs.

14,030,414

total visits in 2024 across
the same hubs.

This inventory supports:

- A clear understanding of the current tourism landscape
- Identification of experience groupings and development opportunities
- Recognition of infrastructure and investment needs
- Evidence-informed planning and resource allocation
- Improved communication with tourism businesses and partners

Grounded in current conditions, the Tourism Asset Map ensures that strategic recommendations build on Innisfil's existing assets rather than relying on speculative development.

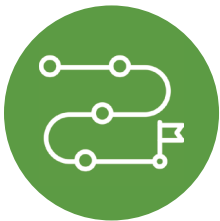
Approach & Methodology

This tourism strategy was developed using a structured, phased planning approach designed to ensure alignment with municipal priorities, reflect local conditions, and provide practical direction for implementation.

The methodology was grounded in four core principles:



Alignment with Municipal Direction: This strategy was developed to align with relevant municipal/regional plans and policy frameworks. This ensured that tourism recommendations reinforce broader infrastructure, sustainability, growth management, and economic development objectives rather than operating independently of them.



Asset-Based Planning: The approach began with identifying and documenting Innisfil's existing tourism assets through a comprehensive inventory and asset mapping exercise. This ensured the Strategy builds on current strengths and conditions, rather than focusing on aspirational development disconnected from the local context.



Evidence-Informed Analysis: The strategy integrates tourism data, market research, and comparative analysis to situate Innisfil within broader tourism trends and regional dynamics. This approach supports decision-making grounded in measurable conditions and market realities.



Integrated Engagement: Engagement was incorporated throughout the process to test assumptions, validate findings, and incorporate on-the-ground perspectives from operators, partners, and residents. Engagement informed not only the identification of opportunities and challenges, but also the prioritization of actions within the implementation framework.

The overall planning process was structured to move from foundational understanding to strategic direction:

1. Establish Context and Alignment
2. Inventory and Assess Assets
3. Analyze Trends and Market Position
4. Engage Industry and Community
5. Synthesize Findings into Strategic Priorities
6. Develop Goals, Objectives, and Implementation Actions

Research and engagement activities were conducted between September 2025 and February 2026. Findings from each phase informed the development of the SWOT analysis and the strategy pillars, goals, and recommended actions.

Alignment with Municipal & Regional Plans

From the outset of this strategy, it was important to root the recommendations and associated resources with initiatives already planned as a part of a larger Municipal strategy. This ensures integration across departments, avoids duplication of effort, and keeps community-level priorities connected to broader cross-Municipal planning.

The progression of tourism planning in Innisfil began with the 2017 Destination Stewardship Master Plan (DSMP) which defined a coordinated municipal approach to development and outlined concrete actions to advance the sector.

The DSMP established foundational priorities focused on sector organization and destination market readiness, including:

- Strengthening municipal leadership and formal industry coordination
- Aligning with regional tourism partners (RTO7 and Tourism Simcoe County)
- Improving operator readiness, including digital capacity
- Addressing accommodation gaps to support overnight visitation
- Enhancing awareness and visitor-facing information

While progress has been made in addressing several of these areas, a number of foundational priorities identified in 2017 continue to require focused attention and implementation due to constraints on staff capacity and resources.

The 2024 – 2026 Economic Development Strategic Plan advanced this direction by highlighting tourism as an important economic driver in Innisfil and recommending embedding tourism and culture within the Town's broader economic framework¹. Tourism was positioned not only as a visitor economy activity, but as a contributor to placemaking, local business vitality, and community identity.

The Economic Development Strategic Plan carried forward several core themes:

- Reaffirming the need to address accommodation gaps through a formal feasibility study
- Calling for tourism and culture branding guidelines and improved use of market data
- Recommending asset mapping of tourism, culture, heritage, and event assets
- Reinforcing alignment with regional tourism partners

¹Town of Innisfil, Economic Development Strategic Plan, 2024-2026 (2024), Strategic Goal #3, 16

It introduced a stronger institutional lens by emphasizing:

- Building internal municipal capacity for tourism and culture leadership
- Embedding economic development considerations into staff decision-making
- Integrating tourism more explicitly with cultural industries and creative entrepreneurs
- Supporting place-based improvements such as wayfinding and downtown revitalization through partnership programs

The 2017 Tourism Destination Management Plan and the 2024–2026 Economic Development Strategic Plan set the stage for the development of this tourism strategy, pointing to where Innisfil can build on its strengths, deepen alignment, and accelerate progress in the visitor economy over the next five years.

Tourism development intersects with multiple municipal departments and policy areas, including land use planning, infrastructure, transportation, parks and recreation, culture, economic development, environmental stewardship, and community services. Decisions made in these areas influence the visitor experience, just as tourism activity influences service levels, public spaces, housing, mobility, and environmental management.

The broader municipal and regional plans that inform this tourism strategy, and the ways in which tourism considerations both influence and are influenced by other policy directions across the organization, are outlined below.

**Innisfil Beach Park
Master Plan
2020**

- Strengthens waterfront as a primary visitor asset and year-round destination
- Supports event hosting, animation, and placemaking opportunities
- Enhances public realm, amenities, and infrastructure that improve visitor experience
- Reinforces environmental stewardship of Lake Simcoe
- Balances resident use with visitor activity in a high-demand tourism area

**Land and Lakes
Master Plan
2023**

- Guides sustainable use of waterfront, shoreline, and natural areas
- Supports water-based recreation and nature-based tourism experiences
- Establishes environmental protection parameters influencing tourism growth
- Identifies infrastructure and access improvements affecting visitor mobility
- Reinforces long-term stewardship of natural tourism assets

**Transportation
Master Plan
2023**

- Supports multimodal access to key destinations including Innisfil Beach Park and Friday Harbour
- Advances active transportation connections, including cycling, sidewalks, lake-adjacent trails, and Trans-Canada Trail linkages
- Reinforces Complete Streets principles to improve pedestrian and visitor mobility
- Identifies transit improvements, including on-demand and regional connections, that enhance access for visitors and workforce
- Addresses traffic management, safety, and regional connectivity that influence visitor flow and experience

**Town of Innisfil
Strategic Plan
2023**

- Identifies economic growth, community identity, and quality of place as priorities
- Supports tourism as a contributor to local business vitality and vibrancy
- Reinforces sustainability, community well-being, and inclusive growth principles
- Aligns tourism with broader objectives under Grow, Sustain, Connect, and Serve priorities

**Integrated
Sustainability
Master Plan
2024**

- Aligns tourism growth with environmental, social, and economic sustainability objectives
- Supports climate resilience and responsible resource management in tourism areas
- Influences infrastructure, mobility, and energy decisions affecting visitor-serving assets
- Reinforces sustainability expectations for tourism-related development

**Official Plan
(Draft)
In development:
Draft, December
2025)**

- Establishes land use policies affecting tourism-related development and mixed-use areas
- Guides accommodation, commercial, waterfront, and rural development opportunities
- Influences infrastructure planning and transportation connectivity impacting visitation
- Balances growth management with protection of cultural and natural assets

The initiatives and priorities outlined within each of these plans provide important context for implementation. For example, development of Innisfil Beach Park will directly influence land use, recreation, and retail decisions in a major identified asset in Innisfil. Similarly, the Transportation Master Plan implements connectivity and wayfinding priorities. By aligning with these efforts, it strengthens the feasibility of the recommendations of the tourism strategy and ensures that local actions are positioned within Innisfil's long-term strategic direction.

Demographics, Trends & Visitor Data

Demographics & Labour Market

Population trends and employment projections anticipate continued expansion in the coming years, reinforcing Innisfil's position as one of the faster-growing communities within Simcoe County. As of the 2021 Census, the Town of Innisfil had a population of 43,326 residents², including a labor force of 36,297³ and a steady labour market participation rate of seventy one percent.

Innisfil's demographics are characterized by a strong working-age population, increasing numbers of young families, and a gradually aging demographic profile. According to the 2021 Census, approximately thirty-nine percent of residents fall within the prime working-age cohort (25-54 years), a proportion comparable to Simcoe County and slightly below the provincial average. Residents aged 65 and over represent seventeen percent of the population, lower than both Simcoe County at twenty percent and Ontario at nineteen percent⁴.

Between 2016 and 2021, population growth was concentrated among children and early-to mid-career adults. The population aged 0-14 increased by nineteen percent to 1,220 residents (+19%), those aged 25-34 grew by 1,070 (+26%), and those aged 35-44 increased by 1,180 (+25%). At the same time, growth in late-career and senior cohorts was significant, with residents aged 55-64 increasing by 1,580 (+30%) and those aged 65-74 by 1,050 (+31%). While Innisfil remains younger overall than the County, the upward trend in older age groups signals future labour force replacement pressures as more residents approach retirement⁵.

Newcomers represented twenty percent of Innisfil's population in 2021, compared to sixteen percent in Simcoe County. However, recent immigration levels are modest. Approximately thirty-two percent of newcomers landed before 1980, and only fifteen percent arrived between 2011 and 2021. Limited recent immigration may constrain future labour supply growth, particularly in service-oriented occupations⁶.

From a tourism and hospitality perspective, Innisfil's demographic profile presents both opportunity and constraint. Growth among families and working-age households supports local demand for recreation, events, parks, and cultural amenities. At the same time, an aging population and limited recent immigration highlight the importance of workforce attraction, retention, and training to sustain visitor-serving sectors as overall growth continues.

²Statistics Canada, Census Profile, 2016 and 2021

³Labour Force represents the population over the age of 15. Data source: McSweeney & Associates from Manifold Data Mining Inc., SuperDemographics 2021 in the Town of Innisfil 2022 Community Profile

⁴Statistics Canada, Census Profile, 2021

⁵Statistics Canada, Census Profile, 2016 and 2021

⁶Statistics Canada, Census Profile 2021

Travel Data & Visitor Trends

Travel behaviour is continuing to shift toward shorter, more frequent trips that prioritize ease, flexibility, and a strong sense of place. Visitors are increasingly drawn to destinations that offer a mix of outdoor recreation, local food and culture, and welcoming public spaces, rather than single-purpose attractions. These patterns favour communities that are easy to reach and offer experiences that fit naturally into everyday travel decisions.

Innisfil's lakeside setting, proximity to the Greater Toronto Area and being along the route into cottage county, as well as the evolving mix of amenities in Town, align well with these preferences. At the same time, regional tourism priorities emphasize sustainability, community benefit, and experience quality over sheer volume⁷.

The following travel trends highlight the most relevant shifts influencing visitor decision-making that relate to Innisfil's tourism context and provide a practical lens for shaping tourism priorities.



Short-Trip and Day-Trip Travel Is the Norm within the Province: Within Ontario, the majority of travel is done by day-trippers and short-stay travellers within the Province⁸. Destinations that offer a clear reason to visit, easy navigation, provide the opportunity for being a regional hub, and offer flexible experiences are best positioned to capture this market.



Experiences Matter More Than Attractions Alone: Travellers are seeking experiences that combine activities, food, and atmosphere⁹. Places that encourage exploration, lingering, and discovery outperform single-purpose stops.



Nature and Community Are Core Motivators: Waterfronts, trails, rural landscapes, and welcoming public spaces are increasingly central to destination choice, especially when paired with local food, markets, and small events¹⁰.



Digital Visibility Is No Longer Optional: Trip planning now begins online, often through search, social media, and increasingly AI-assisted tools¹¹. Destinations and businesses must be easy to find, easy to understand, and visually compelling.



Sustainability and Fit with Community Values Matter: Visitors are more aware of their impact and more receptive to destinations that demonstrate care for their environment and residents. This is particularly true for higher-value and repeat visitors¹².

⁷RTO7, 2024. Five-year Destination Development Strategy (2024-2029)

⁸ Context Research Group, October 2025, Ontario Travel and Tourism Monthly (OTTM)

⁹ Context Research Group Inc. (2025). Ontario Consumer Study results.

¹⁰ Context Research Group, October 2025, Ontario Travel and Tourism Monthly (OTTM)

¹¹ Canadian Tourism Data Collective. (2025). Tourism outlook 2025–2030 dashboard.

¹² Context Research Group Inc. (2025). Ontario Consumer Study results.

The Economic Opportunity

Tourism is one of Canada's largest and fastest-growing economic sectors, and the conditions that drive that growth are working in Innisfil's favour. Appreciation for the scale of visitation numbers and tourism economic revenue being driven at the national, provincial, and regional levels is essential for understanding the need for investment in tourism management to provide sustainable development. Communities that are well-positioned but passively managed will see tourism happen around them and to them. Communities that act strategically are able to capture a share of the significant economic circulation already underway.

Canada's tourism sector contributed \$129.7 billion in total revenue in 2024, accounting for 1.8% of national GDP. This tourism revenue is forecasted to continue to steadily grow with estimates surpassing \$150 billion by 2030¹³.

Domestic travel has been the engine of this national travel growth, reaching an all-time high of 105.6 million trips in 2024 contributing \$98.6 billion in revenue to the GDP¹⁴. The single most important driver of that national growth is the type of trip Innisfil is best positioned to offer: close-to-home, experience-rich domestic travel. Canadian travellers are not primarily flying internationally anymore, they are driving to nearby destinations that offer nature, local food, community character, and easy planning.

At the provincial level, Ontario leads the nation in total visitation with domestic visitors making nearly 120 million visits to Ontario in 2024¹⁵. The intent to travel within Ontario remains high through 2026, as 79% of Ontario residents plan to travel within the province in the next 12 months according to polling in late 2025. With Ontario residents planning an average of 3.7 day trips and 1.8 overnight trips to intraprovincial destinations¹⁶. The Tourism Industry Association of Ontario projects in their Strategic playbook for Ontario's tourism industry, 2025–2030 that visitor spending would reach \$30.7 billion in 2025 and will potentially hit \$33.9 billion by 2030 under modest growth scenarios¹⁷.

2025
\$30.7B
Projected visitor spending in Ontario.

2030 Projection
\$33.9B
Projected visitor spending in Ontario under a 2% annual growth scenario.

¹³ Canadian Tourism Data Collective, Tourism Outlook 2025–2030 Dashboard

¹⁴ Destination Canada, Canadian Tourism Data Collective, & Statistics Canada. (2025). The contribution of tourism in 2024: Jobs and economic growth across Canada [PDF]. https://www.tourismdatacollective.ca/system/files/2025-07/The%20Contribution%20of%20Tourism%20in%202024_0.pdf

¹⁵ Statistics Canada. (2025, September 17). Canadians visiting Ontario: Shorter trips, but many of them. <https://www.statcan.gc.ca/o1/en/plus/8513-canadians-visiting-ontario-shorter-trips-many-them>

¹⁶ Context Research Group Inc. (2025, November). Destination Ontario Insights Portal: Ontario Travel & Tourism Monthly (OTTM), October 2025. Retrieved November 25, 2025), from <https://doinsights.crg.ca/en-ca/publications/ontario-travel-tourism-monthly-ottm-october-2025>

¹⁷ Tourism Industry Association of Ontario. (2025). A strategic playbook for Ontario's tourism industry, 2025–2030 [PDF]. <https://www.tiaontario.ca/cpages/tourismstrategy>

Critically, Ontario's tourism spending is also geographically dispersing, with 35% of total provincial tourism spending now occurring outside of traditional hotspots like Toronto, Niagara, and Muskoka¹⁸. This is a fundamental shift in where tourism dollars flow, and it reflects exactly the kind of redistribution that benefits communities like Innisfil that sit between major urban centres and established cottage and resort markets.

35%
of Ontario's total tourism spending now occurs outside of Toronto, Niagara, and Muskoka.

At the regional level, Simcoe County attracted 14.7 million visits in 2024¹⁹, generating over \$1 billion in revenue circulating within the County²⁰. That spending has translated into significant municipal revenue as well, with Municipal Accommodation Tax collections exceeding \$2 million across five municipalities in 2024²¹. While larger hubs such as Collingwood, Midland, and Wasaga Beach drive strong volumes, smaller rural and lakeside communities are increasingly sharing in this momentum. Innisfil sits within this regional ecosystem but does not yet fully participate in it. Capturing a larger share of this regional circulation requires strategic investment at the local level to make Innisfil more discoverable, more product-ready, and better connected to these regional systems.

2024	VISITATION IS DRIVING REAL ECONOMIC RETURNS IN SIMCOE COUNTY	14.7M Total Visits	\$1B+ Visitor Spending
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Municipal Accommodation Tax collections exceeded \$2 million across five municipalities within BruceGreySimcoe in 2024, confirming that visitor spending is translating directly into municipal revenue for communities across the region.

Innisfil is not starting from zero. The Town already benefits from significant visitation activity, and the regional data makes clear that there is a much larger economic opportunity within reach. The visitor data examined in the following section reveals the local scale of visitor activity and provides the foundation for priorities for the tourism strategy to capture more of it.

¹⁸ Destination Canada. (2025). Wealth & wellbeing index [PDF]. Canadian Tourism Data Collective. <https://www.tourismdatacollective.ca/system/files/2025-02/CTC-Wealth%20and%20Wellbeing%20Index-ENG-Feb7.pdf>
¹⁹ BP Insights. (2025, July 17). Town of Innisfil tourism Geofence Project: 2024 Visitor Numbers. Statistics produced by Environics Analytics.
²⁰ County of Simcoe Economic Development Office. (2023, January). 2022 Tourism Sector Profile [PDF]. <https://edo.simcoe.ca/wp-content/uploads/2023/01/2022-Tourism-Sector-Profile.pdf> Simcoe County EDO
²¹ RTO7. (2025, April). Building a sustainable future together: The RTO7 sustainability report (2024/2025) [PDF]. https://rto7.ca/getattachment/Public/RTO7-Connection/June-2025/Building-a-Sustainable-Future-Together-The-RTO7-20/Final-Sustainability-Report-04_25.pdf.aspx

Innisfil's Visitor Landscape

In 2024, Innisfil recorded an estimated 685,413 unique visitors²², increasing from 662,694 unique visitors in 2023, reflecting modest year-over-year growth in the number of individual visitors²³. Over the same period, the total number of visits declined slightly overall, indicating a small reduction in repeat trip frequency even as the number of unique visitors increased.

Visitor reach and travel distance

Innisfil's visitor economy is primarily regional, with repeat visitation strongly influenced by proximity. Approximately 73% of all visits originate within 40 kilometres of Innisfil, confirming that the destination draws a significant share of its activity from nearby communities. However, when assessed by unique visitors rather than repeat trips, the visitor catchment broadens. In 2024, approximately 47% of unique visitors travelled from within forty kilometres, while approximately forty-one percent travelled from 41 to 80 kilometres, demonstrating that Innisfil attracts a substantial share of visitors from wider regional markets in addition to high-frequency local visitation.

INNISFIL VISITOR PROFILE

Local Market (0-40km)

- 44.6% of unique visitors
- 73.0% of total visits

Primary driver of frequent, high-volume traffic

41–80 km Radius

- 40.9% of unique visitors

Represents a significant regional audience

What This Means

Innisfil benefits from a balanced visitor mix

- Strong local engagement
- Consistent regional draw
- Ideal for day trip experiences

YEAR-OVER-YEAR UNIQUE VISITOR COUNTS²⁴



Unique Visitor increase of 3%.

VISITOR CATCHMENT DISTRIBUTION (2024)²⁵

Distance Radius	Share of Unique Visitors	Share of Visits
0-40km	44.6%	73.0%
41-80km ²⁶	40.9%	20.1%
81-110km	4.9%	2.2%
111-160km	4.5%	2.2%
161km+	5.1%	2.5%

²² Unique Visitors counts each individual once within a geofence, whereas visits will count the frequency.

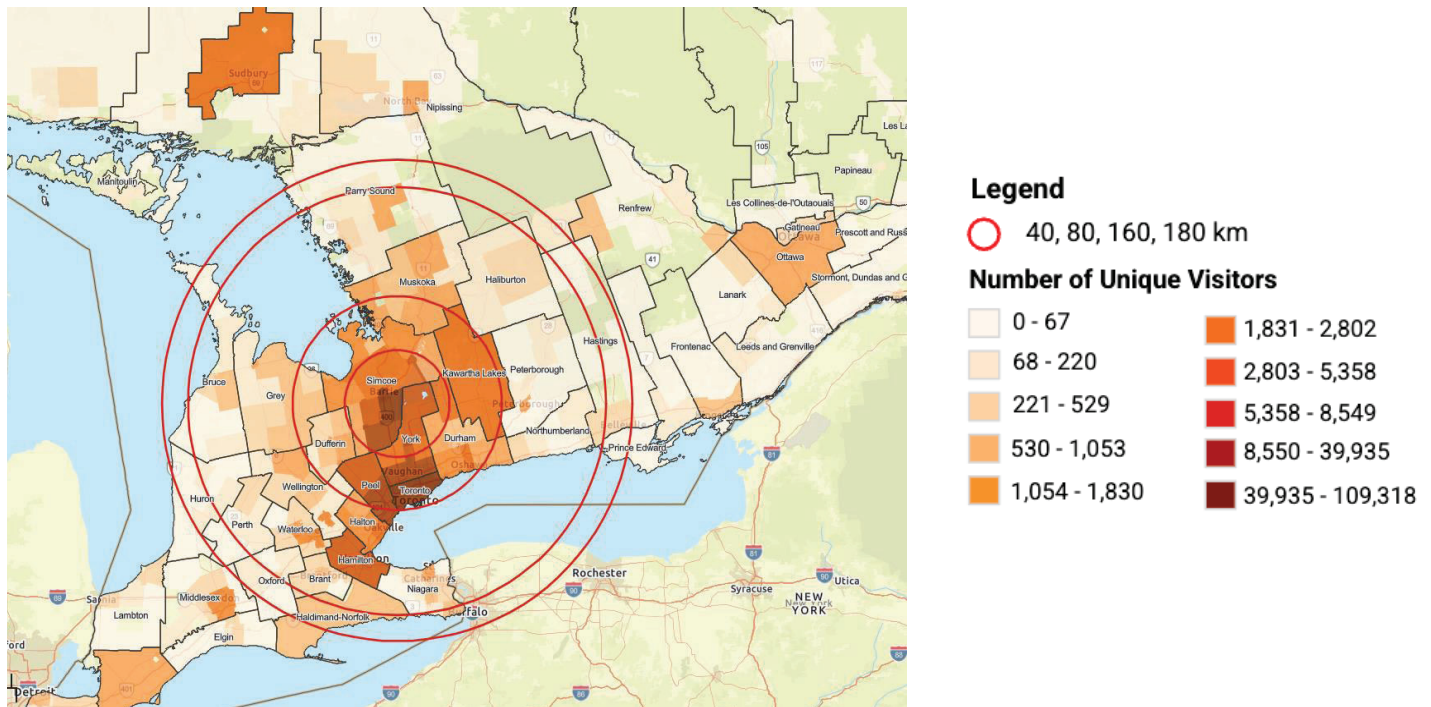
²³ BP Insights, 2025. Innisfil Tourism Geofence Project 2024

²⁴ BP Insights, 2025. Innisfil Tourism Geofence Project 2024

²⁵ BP Insights, 2025. Innisfil Tourism Geofence Project 2024

²⁶ The Province of Ontario defines a tourist as someone travelling to an out-of-town destination that is 40km or more from their home.

The analysis also identifies a positive shift in destination reach. Visits from visitors travelling from beyond 40 kilometres increased by approximately 15 percent year over year, suggesting growing awareness and stronger draw from non-local markets, including more planned day-trip behaviour²⁷.



Source: BP Insights, 2025. Innisfil Tourism Geofence Project 2024

Visitor origin markets

Visitor origins are concentrated in the Greater Toronto Area and surrounding regions. The largest shares of unique visitors are identified as coming from York Region, Toronto, and Peel Region, followed by the rest of Simcoe County, with additional visitation from other Ontario markets further afield. This reinforces Innisfil's position as an accessible destination within driving distance of major population centres and highlights the importance of maintaining strong connections to these regional feeder markets.

INNISFIL DRAWS FROM BOTH LOCAL AND GTA MARKETS

0–40 km Radius

- 44.6% of unique visitors
- 73.0% of total visits

Core local audience driving frequent visits.

41–80 km Radius

- 40.9% of unique visitors

Significant regional market with strong day-trip activity

Key Insight

Innisfil benefits from a balanced visitor base, combining local regulars with regional day-trippers from the GTA.

²⁷ BP Insights, 2025. Innisfil Tourism Geofence Project 2024

Seasonal patterns

Visitation peaks during the summer season, particularly from June to August, with secondary increases in December and March²⁸. This reflects strong seasonal demand associated with summer-oriented activity, alongside winter-period visitation that may relate to holiday travel, market shopping, and outdoor activities such as ice fishing. This seasonality reinforces the importance of experience development and programming that can strengthen demand outside the peak summer period while supporting a balanced approach to resident and visitor use of key destination areas.

Visitor profile and segmentation

Visitor segmentation indicates that Innisfil's visitor market includes a mix of family groups and mature couples, with additional representation from young adults and younger households. The largest identified segment is Urban Diverse Families, representing twenty-nine percent of all visitors, described as culturally diverse and often multigenerational households largely from the Greater Toronto Area, with travel motivations that include shopping, family visits, and recreation. Additional family-oriented segments, including higher-value family markets, are also identified, indicating that families are a core visitor group and a priority consideration for experience development, accessibility, and visitor services.

There were 7 Target Groups identified from Environics PRIZM segmentation profiles as over-indexing for visitation to Innisfil²⁹. These include:

- TG1: Countryside Families
- TG2: Exploring Country Couples
- TG3: Affluent Established Families
- TG4: Affluent Suburban Families
- TG5: Mid-Income Visiting Families
- TG6: Younger Lake Simcoe Avids
- TG7: Urban Diverse Families³⁰



²⁸ BP Insights, 2025. Innisfil Tourism Geofence Project 2024

²⁹ BP Insights, 2025. Innisfil Tourism Geofence Project 2024

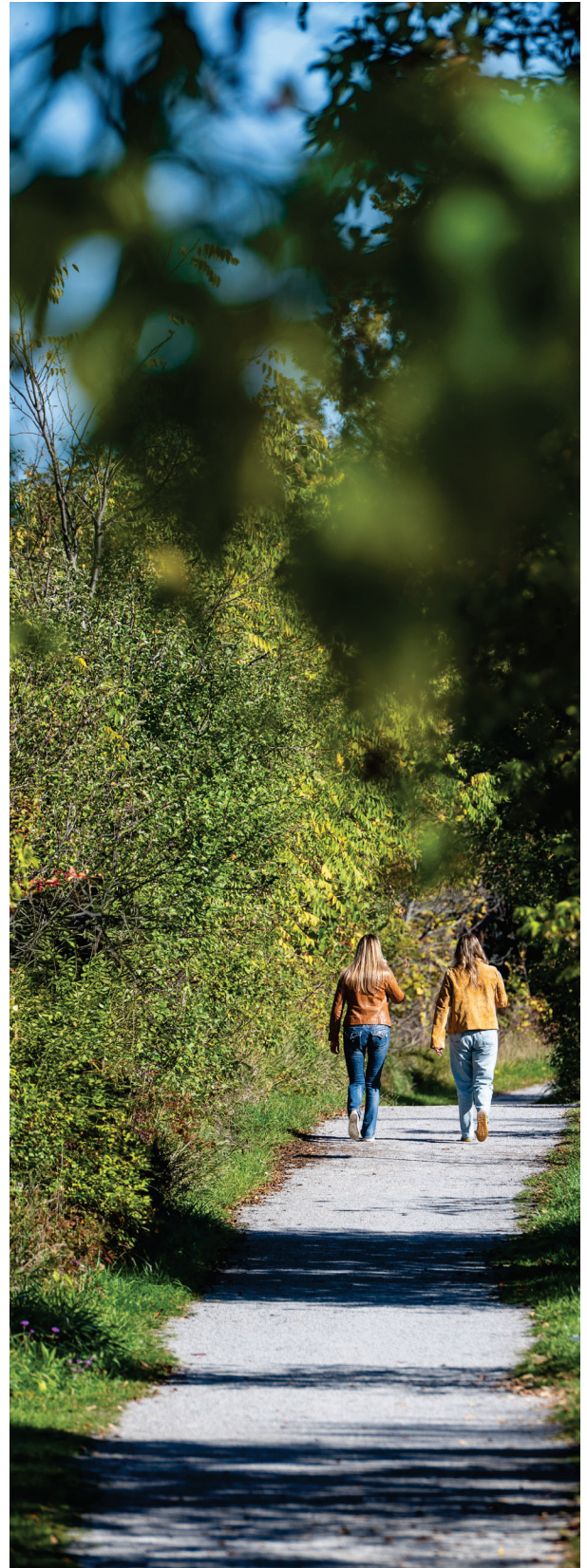
³⁰ A full Tourism Trends and Data Analysis, along with a description and characteristics of the profiles is provided within Appendix B: Innisfil Tourism Trends and Data Analysis.

Urban Diverse Families, Affluent Established Families, and Affluent Suburban Families represent the highest numbers of visitors to Innisfil, accounting for over half of visitors, and pointing to a family-led market that includes regional day-trippers and higher-spending households.

The highest volume are Urban Diverse Families (28.6% of visitors), who are starter to mid-aged families, including multi-generational households, with an average income of ~\$121,000. Their prominence reinforces the importance of accessible, social, family-oriented day trip and short stay experiences marketed towards the Greater Toronto Area, particularly highlighting waterfront access, parks, trails, shopping, casual dining, and community events.

The presence of Affluent Established Families (15.3% of visitors, \$271,000 average income) and Affluent Suburban Families (12.2% of visitors, \$211,000 average income) suggests an opportunity in the more experience-driven and higher-spending market. Their leisure interests indicate a passion for arts and culture, as well as polished, well-packaged, active experiences that are highly shareable. This aligns with existing strengths in Innisfil such as Friday Harbour, numerous golf courses, waterfront dining and retail, sport/recreation amenities, seasonal markets, and opportunities to combine multiple stops into a fuller day-trip or short-stay experience.

These findings demonstrate that Innisfil caters to a diverse range of visitors, but that family and multi-generational and short-day trip travel are the most prevalent. Strategic directions should build on this existing pattern to try to capture more spending from existing visitors, focusing on better connecting, packaging, and elevating the waterfront, recreation, dining, shopping, and event assets to appeal to family-oriented and higher-value regional visitors.



The Tourism Ecosystem

Tourism in Innisfil operates within a multi-layered ecosystem that includes municipal leadership, regional partners, industry stakeholders, and provincial organizations. Each plays a distinct but interconnected role in shaping how tourism develops and functions, from setting local direction and managing community impacts, to delivering marketing platforms, funding programs, research, and sector supports. This ecosystem influences not only how visitors experience Innisfil, but also how tourism activity is planned, supported, and balanced alongside resident quality of life, infrastructure capacity, and long-term sustainability goals.

The Town of Innisfil

Innisfil's Economic Development Strategic Plan identifies tourism as one of Innisfil's target sectors alongside advanced manufacturing, agri-technology/food processing, creative industries, life sciences, and the clean-tech supply chain. Tourism along with culture are also embedded within the Economic Development Strategic Plan, including a dedicated goal focused on leveraging tourism and culture to promote economic prosperity and strengthen community identity.

In this context, as the destination-level lead, the Town of Innisfil sets direction and creates the conditions for tourism to contribute to local economic goals and resident quality of life. The Town's role is not to operate tourism businesses directly, but to provide strategic coordination and enabling conditions that support a healthy visitor economy. Tourism outcomes are shaped across the municipal organization, including planning, parks and recreation, culture, transportation, infrastructure, communications, and environmental services. Municipal decisions related to land use, public realm investment, mobility, events, and environmental stewardship directly influence the visitor experience and how tourism activity interacts with community services and public spaces.

Within the municipal structure, tourism is currently embedded within the Economic Development portfolio. With no dedicated tourism-specific position, tourism responsibilities are carried alongside broader communications, marketing, and economic development functions. As tourism opportunities grow, limited staff capacity and resources can constrain the Town's ability to consistently support tourism development in a way that translates interest into measurable outcomes. The Town regularly receives requests for support from event organizers and visitor-focused businesses, including potential large golf tournaments and music festivals, but is not currently positioned to provide tourism-specific coordination and follow-through at the level required. Capacity constraints can also limit the Town's ability to move beyond promotion into the hands-on supports many small businesses require to build new market-ready experiences.

The Economic Development Strategic Plan recognizes that capacity is foundational to advancing tourism and culture, including actions to investigate the feasibility of expanding the Economic Development Department to include a tourism and culture division. It also identifies ensuring “capacity is in place for existing programs and newer efforts in tourism and culture” as a core objective under the tourism and culture goal³¹. Strengthening internal capacity through a dedicated tourism role would improve the Town’s ability to coordinate across departments, support partners in experience development, and better position Innisfil to capture a greater share of Ontario’s multi-billion-dollar visitor economy³².



Tourism Partners

Within the tourism ecosystem, industry partners play a coordinating role by connecting local priorities to regional platforms, funding, and expertise. Organizations like the destination marketing and management organization (DMO) and the Regional Tourism Organization (RTO) help align communities and industry around shared goals, supporting everything from experience and product development to visitor marketing, research, and workforce initiatives. They also act as a bridge to provincial-level tourism partners and systems, helping local destinations and operators plug into broader programs, standards, and market reach through organizations such as Destination Ontario, the Tourism Industry Association of Ontario, and Indigenous Tourism Ontario.

Regional Tourism Organization 7 (RTO7): BruceGreySimcoe

One of Ontario’s designated regional tourism organizations, RTO7 operates as an independent, industry-led, not-for-profit corporation funded by the Ontario Ministry of Tourism, Culture and Gaming. RTO7 provides regional leadership and coordination to support the development of a competitive and sustainable tourism sector across Bruce, Grey, and Simcoe counties. Provincial funding provided to RTO7 is focused on supporting product development, destination marketing, workforce development, and investment attraction. RTO7 works in partnership with communities and industry to grow visitation and strengthen the visitor economy, offering visitor-facing supports through its consumer marketing platforms and industry-focused programs, tools, and resources through its industry channels.

³¹ Town of Innisfil Economic Development Strategic Plan, 2024–2026 (2024), pg 17.

³² Ontario’s domestic travel market was \$24.8 Billion in 2024 according to StatsCan (2025).

Alignment with RTO7: BruceGreySimcoe Strategy:

RTO7 Destination Development Action Plan 2024-2029

- Supports regional marketing alignment and destination positioning across BruceGreySimcoe
- Advances product and experience development funding streams accessible to Innisfil operators
- Prioritizes workforce development and tourism investment attraction
- Provides research, market intelligence, and performance data to inform local decision-making
- Encourages regional collaboration and cross-boundary visitor experience development

Tourism Simcoe County (TSC)

Tourism Simcoe County is the destination marketing and management organization (DMO) and is a department within the municipal structure of Simcoe County. Funded by the County, the organization provides regional leadership and representation for the tourism sector, working to strengthen collaboration and partnerships across the industry. Its mandate includes supporting tourism product development and innovation, destination marketing and promotion, and advancing research, data, and learning within its region. Tourism Simcoe County supports both visitors and industry through a range of online resources, tools, and programs delivered through its public-facing and industry channels.

Alignment with Tourism Simcoe County Strategy:

One, Together: Tourism Simcoe County's Destination Stewardship Plan 2023-2026

- Advances destination stewardship model balancing economic, environmental, and social outcomes.
- Aligns with year-round, diverse, high-quality tourism product development across the County.
- Emphasizes partnership, collaboration, and regional ecosystem alignment.
- Supports research-informed marketing and product development.
- Reinforces stewardship of waterways, natural assets, and community well-being.

Tourism Industry Association of Ontario (TIAO)

The Tourism Industry Association of Ontario (TIAO) is Ontario's sector-wide tourism association, providing province-level leadership through advocacy, sector convening, and industry coordination. TIAO plays a system-shaping role by connecting industry priorities to government decision-making and by aligning regional and sector partners behind shared goals.

TIAO initiated and facilitated Ontario's Strategic Tourism Playbook (2025–2030) as a sector-led roadmap developed through broad, province-wide consultation, including Indigenous leaders, operators, RTOs, DMOs, educators, and public agencies. The Playbook positions TIAO as a key coordinating partner alongside Destination Ontario and regional/local delivery organizations, with TIAO and sector leaders convening, championing, and advocating to support long-term visitor economy growth.

Alignment with TIAO Strategy:

**Forward Motion:
A Strategic
Playbook for
Ontario's Tourism
Industry
2025-2030**

- Reinforces a coordinated tourism system, clarifying complementary roles across municipalities, RTOs/DMOs, and provincial partners.
- Prioritizes experience and product development that is rooted in place, market-ready, and capable of supporting four-season visitation.
- Elevates workforce resilience as a foundational requirement for service quality, visitor satisfaction, and sector sustainability.
- Emphasizes stronger visitor-facing supports, including trip planning, navigation, and information tools that improve the end-to-end experience.
- Positions practical sustainability and stewardship as essential to long-term destination competitiveness and community well-being.



Destination Ontario (DO)

Destination Ontario is Ontario's provincial destination marketing organization and a Government of Ontario agency responsible for marketing the province as a travel destination. Its core mandate is to generate increased visitation and tourism spending by positioning Ontario in domestic and international markets, and by delivering joint marketing initiatives with industry and tourism partners.

Within the tourism ecosystem, Destination Ontario provides province-wide leadership through consumer marketing, travel trade and media promotion, and market research and insights that help inform tourism development and investment decisions across the province. It works alongside regional and local delivery partners, including RTOs and DMOs, to align destination priorities and strengthen Ontario's competitiveness as a visitor economy.

Community Partners

Tourism in Innisfil is supported by a wider ecosystem than tourism organizations alone. It includes the groups that shape community life and visitor experience every day, from arts and culture organizations and event partners, to education and workforce institutions, business support agencies, service providers, and community hubs that help people navigate and connect with the town. These partners influence what there is to do, how welcoming and accessible experiences feel, and how local capacity grows over time. The descriptions that follow provide a small snapshot of this broader tourism ecosystem, highlighting a few of the key organizations that help bring Innisfil to life for residents and visitors alike.

Georgian College: Hospitality, Tourism, and Recreation

Georgian College is a public post-secondary institution serving Central Ontario and plays a workforce development role within the regional tourism and hospitality sector. Through its hospitality, tourism, recreation, and entrepreneurship programming, the College supports skills development, applied learning, and industry readiness. Georgian has historically contributed to the labour force needs of resorts, restaurants, attractions, and visitor-serving businesses across Simcoe County and the broader region. Georgian supports the tourism industry capacity through experiential learning, co-operative education, and business development programming, contributing to long-term sector resilience and workforce sustainability.

Lakehead University

Lakehead University, a public research and teaching institution with campuses in Thunder Bay, Orillia, and Barrie, supports regional socio-economic development through partnerships and educational initiatives. The University strengthens workforce capacity and community resilience by connecting academic expertise with industry, government, and not-for-profit sectors. Through the Office of Innovation, Partnerships and Economic Development (IPED), Lakehead facilitates research collaborations, technology transfer, business support services, and knowledge exchange to bolster the regions it serves. Lakehead's mandate includes community-centred learning, fostering industry-academic partnerships, supporting entrepreneurship, and delivering professional development. These efforts enhance local talent development, community innovation, and long-term economic competitiveness across sectors relevant to tourism, such as hospitality, culture, and small business growth.

Toronto Metropolitan University (TMU)

Toronto Metropolitan University's DMZ is a university-based incubator and startup ecosystem that supports entrepreneurs through tailored programming, resources, and an extensive mentor and partner network. Founded at TMU in 2010, DMZ works to help founders build and scale ventures, with programming that connects entrepreneurs to expertise, capital pathways, and peer communities.

Within Innisfil's economic development and tourism ecosystem, the Town has partnered with TMU's DMZ to deliver DMZ Innisfil, a local business and startup support platform serving Innisfil and the broader Simcoe County region. DMZ Innisfil provides structured programs that help entrepreneurs validate ideas, build operational capacity, and scale growth, including offerings such as a launchpad program, a startup incubator, and a business accelerator.

Nottawasaga Futures

Nottawasaga Futures is a Community Futures organization serving South Simcoe, dedicated to strengthening local entrepreneurship and community economic development through business financing and advisory supports. As a regional delivery organization, it offers loans to eligible start-ups and expanding businesses across the South Simcoe area, including Innisfil, via its Community Investment Loan Fund. Beyond access to capital, Nottawasaga Futures provides business counselling and practical supports to help small businesses build capacity, improve viability, and grow employment. It also contributes to regional sector development through community-based projects and partnership initiatives, such as supporting screen-based industries by promoting South Simcoe as a filming location and connecting productions with local suppliers and services.

Innisfil ideaLab & Library (ILL)

The Innisfil ideaLAB & Library is Innisfil's public library system, operating multiple branches and providing community-wide access to information, learning, and cultural programming. Beyond traditional library services, ILL offers creative and digital maker supports through spaces like the HackLAB and MediaLAB, providing tools, equipment, and learning opportunities that enable residents and visitors to build skills and create projects. Functioning as a community "front door," the Library serves as an informal visitor information touchpoint, assisting people with navigating local amenities, services, and experiences. Its year-round events and programs enhance community engagement and strengthen the sense of place, contributing to the cultural vitality that makes Innisfil a compelling destination for both residents and visitors.

Cookstown & District Chamber of Commerce

The Cookstown & District Chamber of Commerce is a member-based, local business association that supports and represents businesses in Cookstown and the surrounding area. The Chamber's core role is to strengthen the local economy through business advocacy, networking, and promotion, helping to connect businesses with each other, with residents, and with opportunities to grow. It provides member supports through communications, visibility tools, and community-building activities designed to keep local businesses informed, connected, and engaged. The Chamber contributes to destination vitality by leading and delivering signature community events that animate Cookstown's main street and encourage visitor spending at local businesses. These events also help reinforce Cookstown's small-town identity and create recurring reasons to visit, supporting a vibrant, walkable, and experience-rich downtown district.

Innisfil Community Events Corporation (ICE Corp)

The Innisfil Community Events Corporation (ICE Corp) is a volunteer-led, not-for-profit organization that supports community well-being by planning and delivering family and social events in the Town of Innisfil. ICE Corp's mandate is centered on community celebration and reinvestment, using event programming to generate funds that support local needs and help improve amenities for residents.

ICE Corp functions as a community animation and placemaking partner, helping to build Innisfil's event calendar, strengthen local pride, and create recurring reasons to visit. Through the delivery of signature events such as the Santa Claus Parade, Polar Bear Dip, and community skates, ICE Corp contributes to year-round vibrancy, supports local business participation and sponsorship, and helps reinforce Innisfil's identity as an active and connected community.

These community partners represent only a snapshot of the broader tourism ecosystem in Innisfil, and the Town is encouraged to continue strengthening and expanding relationships with additional organizations and community groups across tourism, arts and culture, sport, education, and related sectors that shape the visitor and resident experience.

Local Tourism Inventory & Asset Map

As a foundational step in developing Innisfil's Tourism Strategy, the Town completed a Tourism Inventory and Asset Map to establish baseline conditions and improve understanding of how Innisfil functions as a destination today. The inventory helps identify clusters, gaps, and opportunities across the community and supports experience planning, infrastructure discussions, and future investment decisions.

The inventory focused on assets with the greatest potential to attract visitors, particularly within retail and culinary experiences, agri-tourism, outdoor recreation and sport tourism, waterfront activities, and festivals and events. While the emphasis was placed on demand-generating attractions, supporting services that contribute to the visitor experience were also considered. Businesses that primarily serve residents, such as gyms, banks, real estate offices, big box stores, and common chain retailers, were not classified as tourism assets.

The inventory was developed through a review and filtering of existing business lists, complemented by tourism business surveys, engagement at the Tourism Summit, and discussions with key partners. Public online sources were also reviewed to address gaps and expand the dataset. The following table outlines the criteria used to guide which assets were included or excluded from the inventory.



Category	Inclusions	Exclusions
Accommodations	Accommodations that provide opportunities for visitors to extend their stays such as resorts, hotels, motels, bed and breakfasts, campgrounds/trailer parks or short-term rentals where available.	Further analysis of Short-Term rentals would need to be assessed.
Adventure Attractions	Indoor or outdoor adventure experiences unique to the region such as gaming, horse racing, go-karting, or other distinctive activities.	
Agri-Tourism	Farmers markets, farms open to the public, and specialty agricultural experiences such as maple syrup producers, bee keepers, or specialty produce farms.	Farms not open to the general public.
Arts/Cultural	Museums, libraries, galleries, artist studios with storefronts, theatres, and community arts groups.	Art studios without a public storefront or visitor access.
Beaches	Publicly accessible beaches.	Beaches that don't have public amenities and primarily serve neighbourhoods in Innisfil.
Boating	Boat tours or cruises, marinas, and publicly accessible boat launch ramps.	Private boat launches without public access.
Sport / Recreation	Sport facilities, fields, and diamonds. Recreation outfitters and rental businesses, and lessons or guided trips such as horseback riding, cycling, etc.	Retail stores that sell sporting equipment but primarily serve the local community (e.g., Canadian Tire).
Culinary	Locally owned and operated restaurants, specialty dining experiences, and unique culinary venues.	Chain restaurants commonly found in other communities were separated into another layer.

Events / Festivals	Larger festivals and events that attract visitors from outside the region.	Small community events that primarily serve local residents, unless they provide the opportunity for growth to attract visitors.
Fishing	Outfitters, charters, and guided experiences that attract visiting anglers, ice hut rental companies, retail shops selling fishing gear.	
Golf	Golf courses that attract visitors to the region, both public and private.	
Heritage	Historic plaques and signs around town.	Buildings without visitor access.
Natural Areas / Parks	Town parks, conservation areas, forests, and natural areas accessible to the public.	Natural areas without public access such as drainage wetlands.
Trails	Trails that offer connection to multiple tourism amenities or experiences, or unique trail offerings	Trails that connect residential areas and neighbourhoods that are primarily for residents' use.
Shopping/Retail	Unique local retail experiences such as specialty shops, markets, or boutiques.	Big-box stores and retail chains primarily serving residents were separated into another layer.

The current inventory focuses primarily on tangible, place-based assets. As a future enhancement, the Town may work with local partners to incorporate intangible aspects of the visitor experience, such as community character, storytelling, local identity, seasonal rhythms, and sense of place. Local initiatives such as the Innisfil ideaLab & Library's *Our Stories Innisfil* program presents a potential partnership opportunity to support this work.

Community Engagement Overview

Engagement with industry partners, and residents was a central component of the Tourism Strategy development process. A range of engagement tools were used to ensure diverse perspectives were captured and to allow participants to contribute in different ways³³.



Innisfil Tourism Summit: In November 2025, the Town hosted the Innisfil Tourism Summit, bringing together 32 tourism operators and partners to learn about the project, the Town's role in tourism, and available business supports. Interactive engagement activities were incorporated into the Summit, including experience development brainstorming, asset mapping, discussions on investment priorities, and exercises focused on identifying opportunities and concerns related to tourism development.



Tourism Business Survey: An online survey was distributed to tourism and tourism-adjacent businesses in Innisfil between November 2025 and February 2026. The survey was meant to broaden the scope of business input collected during the Tourism Summit, and gather feedback from businesses who were unable to engage with us during the other avenues. The survey gathered 24 responses and insights were gathered into current opportunities and challenges, business needs, collaboration interests, and perspectives on the future of tourism in the community.



Resident Survey: A community survey was made available online in January 2026 to provide residents with an opportunity to share their views on tourism in Innisfil. The survey received 36 responses and explored perceptions of tourism impacts, desired future directions, and priorities for tourism development.



Key Industry Partner Interviews: Twelve interview sessions, with a total of 25 participants, were conducted with key industry and institutional partners identified by the project team between December 2025 and February 2026. Participants included representatives from major attractions, tourism-related industries, regional tourism organizations, and educational partners. These interviews provided in-depth insight into strategic opportunities, constraints, and partnership considerations.

Insights gathered through research and engagement were synthesized into 'What We Heard' Reports and used to inform the next stages of strategy including the SWOT analysis, and the development of the goals, objectives and recommended actions within the implementation plan. This can be found within Appendix C: Summary of Community Consultations.

³³ A detailed summary of each Engagement Session can be found in Appendix C: Summary of Community Consultations

Key Themes that Emerged from Community Engagement

Engagement with residents, tourism businesses, regional partners, educational institutions, and major anchors revealed consistent themes regarding Innisfil's tourism strengths, challenges, and future direction. While perspectives varied, several clear patterns emerged.

The Lake and Waterfront Are Innisfil's Defining, but Underleveraged Asset

During engagement, it became clear that Lake Simcoe and the waterfront is a foundational part of Innisfil's tourism identity. Beaches, boating, trails, waterfront dining, and ice fishing form the core of Innisfil's current visitor appeal.

Both residents and businesses noted that waterfront experiences are not yet fully realized, connected, or supported by sufficient amenities and would benefit from further coordination and infrastructure investment. Opportunities exist to:

- Enhance waterfront dining and gathering spaces
- Improve public access and wayfinding
- Expand four-season lake-based programming
- Strengthen stewardship and environmental management

Innisfil's Tourism Product Requires Clearer Definition

Participants consistently emphasized that Innisfil has strong individual assets but lacks a clearly articulated destination identity. While major anchors such as Friday Harbour, Tanger Outlets, Gateway Casino, waterfront dining clusters, agritourism operators, and sports facilities attract visitation, these assets are not yet consistently connected under a shared Innisfil story or presented as part of a broader visitor experience within the Town. This limits awareness of Innisfil as a destination in its own right and reduces opportunities for cross-promotion, longer stays, and movement between places within Innisfil.

There is strong support for:

- Defining Innisfil's destination DNA
- Positioning individual destinations and experiences more clearly as part of Innisfil
- Packaging complementary experiences (e.g., dining & golf, agritourism & cycling, ice fishing & culinary)
- Strengthening storytelling around local character, small-town charm, and the distinct communities that together make up Innisfil
- Using tourism marketing and branding to build stronger recognition of Innisfil as the umbrella destination and encourage travel between its destinations and communities

Participants cautioned against attempting to compete as a mass tourism destination, instead favouring niche, experience-based growth aligned with community character. This suggests a need to market Innisfil not as a single concentrated tourism hub, but as a collection of distinctive experiences connected through a stronger shared identity, more intentional place branding, and better cross-promotion across the Town.

Infrastructure and Mobility Gaps Are Limiting Growth

Across all engagement formats, infrastructure constraints were identified as a primary barrier to tourism growth. Both businesses and residents recognized that without addressing access and accommodation constraints, tourism growth will remain limited and economic benefits will continue to leak to neighbouring municipalities.

Recurring concerns included:

- Limited hotel and overnight accommodation supply
- Parking shortages and fees for out-of-town visitors at beaches and event spaces
- Transportation gaps between key nodes (beaches, Tanger Outlets Cookstown, Friday Harbour Resort, Gateway Casinos Innisfil)
- Lack of transit and workforce mobility
- Wayfinding and signage deficiencies

Workforce Development and Youth Pathways Are Emerging Priorities

Education and workforce partners highlighted significant recent shifts in hospitality and tourism programming, including declining enrollment leading to program cuts and challenges attracting domestic students into the sector. Tourism workforce readiness was also identified in business survey results as a foundational need.

Strong opportunities were identified to:

- Connect high school Specialist High Skills Major programs with post-secondary pathways and industry experience opportunities
- Develop tourism-focused entrepreneurship supports
- Introduce micro-credentials and professional development
- Engage youth through innovation challenges and experiential learning events that are already occurring with community partners

Collaboration and Governance Require Greater Clarity

Engagement participants repeatedly emphasized that tourism development cannot occur in isolation. Major anchors expressed willingness to collaborate more formally within a coordinated tourism ecosystem and develop greater community partnerships.

There is a strong appetite for:

- A structured tourism network or advisory body made up of industry representatives
- Clearer cross-departmental coordination within the Municipality on tourism initiatives
- Stronger alignment with regional partners (Tourism Simcoe County, RTO7) to amplify messaging and engage with their programming
- Shared visitor-facing platforms for itineraries, storytelling, and cross-promotion

Residents Support Tourism (With Conditions)

Resident survey data indicates moderate support for tourism investment, with strong emphasis on protecting quality of life and environmental assets. Many residents identified benefits such as support for small businesses, local job creation, and improved amenities.

However, concerns around crowding, litter, and loss of small-town character were also clearly expressed. This reinforces the importance of pacing tourism growth carefully and maintaining a “community first” approach.

Key resident priorities include:

- Environmental protection (beaches and lake health)
- Traffic and parking management
- Waste management
- Infrastructure improvements

Experience-Based and Niche Tourism Are Preferred Over Mass Growth

Across all engagement streams, participants expressed preference for:

- Agritourism and farm-based experiences
- Culinary tourism and local food
- Festivals and sport tourism
- Waterfront and outdoor recreation
- Arts, culture, and maker experiences

There was little appetite for high-volume tourism disconnected from infrastructure capacity. Instead, participants favoured intentional, high-yield, experience-driven growth that reflects Innisfil's landscape, seasons, and community character.

Overall, engagement findings indicate that Innisfil is not seeking rapid expansion of tourism volume. Rather, there is broad alignment around building a coordinated system that:

- Clarifies identity
- Strengthens collaboration
- Addresses infrastructure constraints
- Builds workforce pathways
- Protects environmental and community assets

These themes directly inform the Strategy's three pillars of Capacity Building, Development, and Stewardship.

Innisfil's Competitive Advantage

Building on the key themes from the engagement findings, Innisfil's competitive advantage in tourism is best understood as a set of complementary assets that, when working collaboratively, create strong day-trip demand and a clear pathway to grow short-stay visitation. Participants consistently pointed to Innisfil's ability to offer high-quality outdoor recreation anchored by Lake Simcoe, reinforced by major visitor anchors along Highway 400 and the high volume of traffic moving through the corridor, and rounded out by locally rooted experiences that add character and seasonal reasons to visit. Compared with destinations that rely on a single attraction or a single season, Innisfil's advantage is the diversity and proximity of its experiences within one municipality, and the opportunity to connect them into a more cohesive, visitor-ready offer.

Lake Simcoe and the Waterfront

Lake Simcoe is Innisfil's most defining and differentiating tourism asset. Engagement reinforced that the Town's extensive shoreline, waterfront access points, marina activity, and waterfront dining provide a destination foundation that many comparable communities do not have at the same scale. At the same time, the shoreline's potential is constrained by a limited number of public beaches and waterfront park spaces, and a need to improve, maintain, and actively manage amenities at existing access points to support both residents and visitors.

The lake drives peak-season visitation through boating, paddling, and fishing, while winter on the Lake and into Cook's Bay provide favourable ice conditions to support a well-established ice-fishing season that draws regional anglers and sustains off-peak visitation, strengthening Innisfil's four-season positioning. Friday Harbour is a concentrated waterfront district that draws regional visitation and boasts a large marina, with waterfront dining, golfing, shopping, activities, and events that add energy to the lakefront experience. Innisfil Beach Park is the primary public front door to the lake, supporting day-use travel, family visitation, and community-based recreation, and is undergoing development to better serve the community.

Innisfil's Major anchors already generate significant visitation and act as a demand generator for local businesses.

- Alcona Downtown: 9.87M total visits
- Tanger Outlets Cookstown: 3.27M total visits
- Friday Harbour Resort: 744K total visits
- Gateway Casinos Innisfil: 145K total visits



Engagement also highlighted opportunities to collaborate with other Lake Simcoe communities to support trip planning and encourage longer stays through connected experiences. Innisfil can also capture more boating traffic by aligning with lake-wide and Trent–Severn travel patterns and promoting visitor-ready services that encourage boaters to extend into the south end of the lake.

As Innisfil leans into its strongest asset, conserving and protecting the waterfront remains central. Growth will require balancing improved access and visitor availability with long-term environmental stewardship.

Highway 400 Corridor Anchors

Innisfil's Highway 400 location creates a different kind of advantage: a high-volume travel corridor that provides consistent exposure to visitor traffic, including cottage country travel and commuter movement to and from the Greater Toronto Area. Tanger Outlets Cookstown, Georgian Downs Racetrack, Gateway Casino, and the 400 Market generate significant annual visits, forming a reliable cluster of entertainment attractions and a secondary tourism hub.

Engagement emphasized that while many corridor trips are currently transactional, the Innisfil ONroute and the anchor attractions create an opportunity to intercept pass-through visitation and convert it into broader destination activity by linking visitors to dining, the waterfront, trails, festivals, and local experiences elsewhere in the Town. Over time, additional accommodation options along the corridor could support longer stays and help shift visits beyond single-purpose stops.

Sport and Recreation Infrastructure

Innisfil's sport and recreation infrastructure supports both organized hosting events and diverse recreation activities. Facilities, including arenas, and sports fields, accommodate tournaments, training, and community events throughout the year, and water-based recreation remains in consistently high demand. However, engagement noted that while Innisfil can attract tournaments and event-driven visitation, limited accommodation supply can constrain the ability to compete for larger-scale events that require multi-night stays.

Beyond organized sport, the Town offers a wide range of recreation and activity-based assets. These include six golf courses, extensive parkland (35 existing inland parks totaling 146.1 hectares³⁴), and popular seasonal activities such as ice fishing, watersports, and an active community of trail users. A growing network of trails and parks contributes to regional draw, including portions of the Trans Canada Trail between Thornton and Cookstown and the waterfront trail through Innisfil Beach Park.

Specialized facilities like SkyDive Toronto, Innisfil Indy Karting, and the Toronto International Trap & Skeet Club further diversify and strengthen the sport and activity-based visitor offering by adding a distinctive experiential adventure tourism component within the regional market.

³⁴ 2023 Town of Innisfil Land and Lakes Master Plan

There is also a clear opportunity to align more closely with Tourism Simcoe County on outdoor tourism development, as regional trail networks are an established strength across Simcoe County, but South Simcoe is noticeably less developed. Coordinated planning and experience development can help address these gaps and strengthen Innisfil's positioning within the wider outdoor tourism system.

Looking ahead, there is a clear opportunity to align more closely with Tourism Simcoe County on outdoor tourism development, particularly as regional trail networks are an established strength across Simcoe County, but with South Simcoe connections noticeably less developed. Coordinated planning and experience development can help address those gaps and strengthen Innisfil's positioning within the wider outdoor tourism system.

Agritourism and Local Food

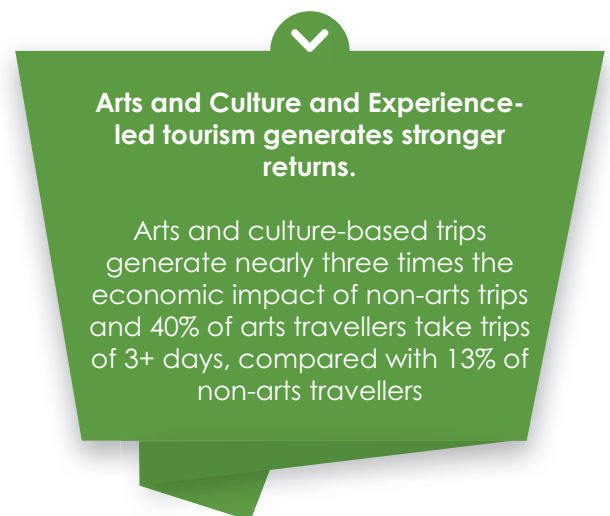
Innisfil's rural landscape contributes a place-based advantage that aligns with growing visitor interest in local food, seasonal markets, and farm experiences. A mix of farm stands and country stores operating both seasonally and year-round helps create a steady stream of local product-based stops across the calendar. Operators such as Laura's Farm Stand, Innisfil Creek Honey, and the Innisfil Farmers Market reinforce local character and offer authentic reasons to visit beyond major anchors.

Innisfil also includes several stops within Simcoe County's Barn Quilt Collection, adding an additional layer of self-guided rural exploration that can be paired with farm stands, markets, and local food experiences. Tourism Simcoe County's "Made in Simcoe County" program provides an opportunity to further profile locally made products and strengthen the visibility of Innisfil producers within a broader regional platform. This cluster complements the waterfront and corridor draws by adding slower-paced, locally rooted experiences that can support shoulder seasons, itinerary-building, and repeat visitation.

Festivals and Community Events

Community-led events add animation and identity, turning public spaces into periodic visitor draws and reinforcing the "small-town" character that engagement participants valued. Events such as Cookstown Wing Ding, Winter Weekends, InnisFALL, Gussapalooza, and MakerFest provide recurring moments that can extend visitation beyond summer peaks when scheduling, promotion, and partnerships are coordinated. This cluster is a practical lever for building seasonal balance, supporting local business traffic, and creating opportunities to share Innisfil's unique story with visitors through local culture, community pride, and memorable moments throughout the year.

Innisfil's competitive advantage is not a single attraction. It is the combined strength of a defining waterfront, high-volume regional anchors, four-season recreation, rural and culinary experiences, and community-story focused events. The strategic opportunity is to improve the connective tissue between these assets both locally and regionally so that day trips become fuller itineraries, visitation spreads more evenly across seasons, and the benefits of tourism are more consistently captured within the community.



Arts and Culture and Experience-led tourism generates stronger returns.

Arts and culture-based trips generate nearly three times the economic impact of non-arts trips and 40% of arts travellers take trips of 3+ days, compared with 13% of non-arts travellers

SWOT Analysis

This SWOT analysis reflects a synthesis of industry engagement, partner input, and existing municipal policy direction. It is intended to provide a clear, tourism-focused snapshot of Innisfil's current position as a visitor destination, from a municipal perspective, and to inform the strategic priorities and actions outlined later in this Strategy.

- **Strengths** are internal value-creating factors that should be built upon.
- **Weaknesses** are internal value-influencing factors that should be mitigated and improved upon.
- **Opportunities** are external value-creating factors that a destination should take advantage of.
- **Threats** are external value-influencing factors that a destination should mitigate where possible and take into consideration when planning for the future.

STRENGTHS

- **Strategic Location:** Located on Highway 400 between Toronto and Barrie, Innisfil benefits from direct access to one of the most significant and accessible transportation corridors in the province and the country. The Town lies along a primary route to Ontario's lake country and is accessible by both road and rail, providing strong connectivity for visitors, residents, and businesses. Planned infrastructure improvements, including the future Innisfil GO Station and reconstruction at Innisfil Beach Road and Highway 400, are expected to further enhance regional accessibility, ease commuting pressures, and strengthen Innisfil's appeal as a place to visit, live, and work.
- **Waterfront and Natural Assets:** Lake Simcoe, marinas, beaches, waterfront dining, and year-round fishing support a range of outdoor and culinary experiences and provide a strong foundation for four-season tourism.
- **Anchor Attractions:** Friday Harbour Resort, Gateway Casino, and Tanger Outlets generate significant visitation and serve as primary demand drivers for the Town, these are outlined further in the Competitive Advantage section.
- **Diverse and Spread Out Tourism Offering:** A wide range of existing tourism-related assets enables Innisfil to appeal to multiple visitor markets and supports flexible, multi-interest trip planning.
- **Engaged Tourism Operators:** Local tourism and tourism-adjacent operators have shown strong interest in collaboration and a willingness to work together to strengthen experiences and grow the visitor economy. Arts, entertainment and recreation, along with short term accommodation and food services, are identified as driving and specialized sectors for Innisfil. Community members have ranked tourism as one of Innisfil's greatest economic strengths, signaling broad recognition of its potential, even as some businesses may not yet fully identify their role within the tourism sector.

- **Regional Collaboration:** Existing partnerships with Tourism Simcoe County and RTO7: BruceGreySimcoe provide a great regional tourism ecosystem that supports tourism development and promotion.
- **Growing Local Market:** Growing at a higher rate than both Simcoe County and Ontario, Innisfil increased its population by 32% between 2011 and 2021, adding an additional 10,599 people³⁵. This growing population and residential base contribute to increased visiting friends and family travel and sustained attendance at local events. With planned developments in Innisfil Heights and The Orbit, the population of Innisfil will continue to increase.
- **Municipal Leadership Role:** The Economic Development department has demonstrated the willingness to take the lead and facilitate development initiatives among partners as was evident with the creation of the Innisfil Tourism Summit, but the department lacks the capacity to offer the supports needed to develop new tourism product.

WEAKNESSES

- **Resourcing Constraints:** Tourism functions are currently integrated within broader marketing and economic development responsibilities rather than supported by a dedicated tourism role. This structure has limited the Town's capacity to lead sustained, coordinated tourism planning and sector development.
- **Inconsistent Destination Awareness and Branding:** Innisfil is not consistently recognized as a single destination. Frequent use of settlement area names fragments identity, reduces awareness of what communities Innisfil includes, and creates challenges when marketing cross-travel and cross-promotion across the Town.
- **Transportation and Workforce Access:** Limited public and regional transportation options make it difficult for hospitality and retail staff to access key attractions, affecting workforce reliability and operational capacity.
- **Limited Accommodation Supply:** A lack of overnight accommodation outside of unlicensed short term rentals constrains visitor length of stay and associated spending.
- **Fragmented Visitor Experience:** Geographically dispersed assets, limited connective storytelling, and brand confusion around place names reduce clarity and make it harder to encourage seamless movement throughout the Town.
- **Variable Operator Readiness:** Inconsistent tourism readiness across operators limits the delivery of a cohesive and reliable visitor experience.
- **Limited Commercial and Tourism-Zoned Land and Properties:** A limited supply of appropriately zoned land and visitor-serving properties constrains tourism investment and growth that could extend stays and increase economic impact.
- **Seasonal Visitation:** Tourism activity is heavily concentrated in the summer season, increasing pressure on peak-season assets.

³⁵Simcoe County and the Province of Ontario had growth rates of 20% and 11% in the same timeframe.

- **Data Gap:** Inconsistent data collection limits the Town's ability to measure tourism performance and inform decision-making.
- **Limited External Tourism Marketing Reach:** Current tourism-related messaging is primarily delivered through municipal and internally focused channels, which may limit reach and awareness among external visitor markets.

OPPORTUNITIES

- **Destination Management Capacity and Direction:** As tourism grows, there is an opportunity to strengthen municipal tourism leadership and governance, supported by a shared tourism vision that connects Innisfil's communities and improved visitor data to guide evidence-based planning and investment.
- **Operator Collaboration and Shared Tools:** Establishing a consistent tourism network for operators and partners, supported by shared templates and tools, can accelerate collaboration and the development of linked, market-ready experiences.
- **Regional Partnerships and Lake Simcoe Collaboration:** Deeper collaboration with RTO7, Tourism Simcoe County, and municipal partners, including Lake Simcoe waterfront communities, can expand reach, align priorities, and unlock joint initiatives such as marketing, funding, and experience development.
- **Year-Round Demand Growth:** Sport tourism, events, festivals, and shoulder-season experiences present opportunities to stabilize visitation beyond peak summer months and strengthen the year-round visitor economy.
- **Visitor Journey and Dispersal:** Leveraging anchor attractions to redistribute visitor flow, paired with improved navigation, signage, and digital tools, can increase visitor confidence and encourage cross-travel across the Town.
- **Self-Guided Discovery and Storytelling:** Expanding curated itineraries, mobile-friendly maps, QR-enabled storytelling, and themed routes can support exploration beyond anchor sites and make the Town's communities easier to experience.
- **Culinary and Agri-Tourism Development:** Structured partnerships, programming, and packaging support for culinary and agri-tourism can create new reasons to visit across seasons and improve operator readiness for visitor traffic.
- **Workforce and Operator Capacity Building:** Connections to education and workforce partners such as Lakehead University and Georgian College create opportunities to support training, workforce development, and overall experience quality.
- **Accommodation and Overnight Growth:** New accommodation investment and alternative lodging options can support longer stays and increased visitor spending.
- **Municipal Tourism Revenue Generation:** Exploring tools such as a Municipal Accommodation Tax, informed by a clearer understanding of local accommodation supply including short-term rentals and enabling conditions, could generate dedicated funding to reinvest in destination marketing, tourism services, infrastructure, and leadership capacity.

- **Culture, Arts and Creative Economy Activation:** Strengthening arts, culture, and creative experiences can build a stronger sense of place, support year-round visitation, and contribute to downtown and community vibrancy.
- **Shared Tourism Vision:** Defining a clear, shared vision for Innisfil tourism can help articulate what the Town offers visitors and guide cohesive experience development over time.
- **Gateway Casinos Innisfil Relocation Opportunity:** Expansion of Gateway Casinos to a new location creates potential for a new visitor attraction or visitor-serving redevelopment on the Georgian Downs property.

THREATS

- **Municipal Fiscal Constraints:** Broader municipal budget pressures and competing service priorities may limit the availability of dedicated funding for tourism leadership, coordination, infrastructure, and implementation activities. This may affect the pace at which strategic initiatives can be advanced.
- **Local Infrastructure Pressures:** As the population grows, it is important that local essential infrastructure keeps up with demand including affordable housing supply and digital and physical connectivity, as well as public works, child care, and health care.
- **Competitive Regional Market:** Nearby destinations in Simcoe County and nearby Muskoka District, have a stronger accommodation supply and marketing capacity to compete for the same visitor markets.
- **Environmental Sensitivity:** Environmental pressures on Lake Simcoe and natural assets highlighted as tourism assets require careful management to sustain tourism long-term.
- **Operational Pressures:** Rising costs and labour shortages affect operator viability and service levels. Without local supports, it is difficult for operators to bring new tourism products to market.
- **Economic Uncertainty:** Shifts in travel behaviour and economic conditions have been shown to reduce discretionary visitor spending as was evident during the recent Covid pandemic's effect on the international travel industry, shifting Canadians to prioritize domestic travel.
- **Community Impacts:** Along with physical infrastructure, managing growth, congestion, and resident quality of life remains critical to sustaining community support for tourism.
- **Climate Impacts:** Climate-related changes may disrupt seasonal tourism patterns and outdoor experiences for example increasingly drastic temperature changes affecting day travel and impacts of blue-green algae on the water quality.



STRATEGIC INVESTMENT IS NEEDED TO ENSURE SUSTAINABLE GROWTH

As local and regional visitation grows, the Town of Innisfil needs to be prepared to capture the economic benefits of the visitor economy. Investment in dedicated resources for tourism development such as staff time, strategic investments, and tourism funding opportunities can help ensure this strategy maintains a 5-year development timeline.



The Strategy

This section outlines Innisfil's Tourism Strategy, including the vision, guiding values, and the strategic framework that organizes goals and implementation priorities. Appendix A provides detailed action tables outlining timelines, roles, resources, and performance measures to support implementation.

This Strategy is intended to guide tourism development over the next five years in a way that strengthens local experiences, supports economic vitality, and aligns with community priorities. It is designed as a living framework and should be reviewed annually to assess progress and adapt to changing conditions.

Vision

Innisfil is recognized as a welcoming, four-season destination where visitors experience the Town's vast waterfront, unique small-town communities, and local culture in ways that support local businesses, respect residents, and contribute to long-term community prosperity.

Guiding Values

Tourism in the Town of Innisfil will be guided by the values of:



Community First: Tourism development is guided by the needs, values, and quality of life of Innisfil residents, ensuring that growth enhances the community rather than detracts from it.



Stewardship and Sustainability: Natural, cultural, and community assets are protected and managed responsibly to support long-term environmental, social, and economic sustainability.



Tourism as an Economic Driver: Tourism is recognized as a strategic economic sector that supports local jobs, strengthens the viability of small businesses, and contributes to long-term community prosperity through visitor spending and repeat visitation. The growth of tourism will focus on ways that increase local economic benefit.



Ecosystem-wide Collaboration: Meaningful partnerships between the Town, local businesses, educational institutions, and regional organizations are essential to building a strong and connected tourism system.



Authenticity: Tourism experiences are rooted in Innisfil's unique sense of place, reflecting its waterfront, rural landscapes, local stories, and community character.



Inclusive Opportunity: Tourism supports diverse participation by businesses, workers, and visitors, creating accessible opportunities across seasons, neighbourhoods, and sectors.



Evidence-Informed Decision Making: Planning and investment decisions are guided by data, research, and industry insight to ensure responsible use of resources and measurable outcomes.

Strategic Framework & Pillars

To guide tourism development over the next five years, this Strategy is organized around three integrated pillars:

Capacity Building:

Strengthening internal coordination, workforce readiness, operator capacity, and data-informed decision-making to support sustained tourism growth.

Development:

Enhancing and connecting Innisfil's tourism assets and experiences to increase visitation, extends stays, and grow economic impact.

Stewardship:

Guiding tourism growth responsibly by aligning it with community priorities, environmental considerations, and long-term municipal planning.

These pillars provide the structure for the Goals and Objectives that follow and establish the framework for implementation.

Goals, Objectives and Implementation Plan

CAPACITY BUILDING

Goal 1: Strengthen Municipal Tourism Leadership, Operational Governance, and Performance Management

This goal focuses on the operational systems required to manage tourism effectively within the Municipal structure, including internal coordination, performance tracking, and sustainable funding tools.

Objective 1: Clarify Tourism Leadership and Governance Within the Town

Action 1.1: Establish a clear internal governance model for tourism-related decision-making

- Define and document cross-department roles for tourism-related files (planning, parks, facilities, roads, transit, comms).
- Implement an integrated internal workflow that combines tourism project routing with a single intake and triage process for tourism and filming inquiries (including service standards, escalation, and tracking).

Action 1.2: Designate and communicate a clear point of coordination for tourism operators

- Confirm and publish a single operator-facing contact pathway (events, filming, wayfinding/signage, referrals).
- Produce and publish local operator support toolkits online (permits, event process, filming basics, partner referrals, funding supports), using existing partner resources where possible.

Objective 2: Strengthen Tourism Data Collection, Monitoring, and Reporting

Action 2.1: Establish core tourism performance indicators

- Confirm KPI set including visitation (proxy), seasonality, experience inventory growth (by theme), itinerary uptake, and operator engagement, and invest in data gathering sources (e.g., Environics, AirDNA).
- Integrate KPIs into annual reporting and internal planning.

Action 2.2: Develop a structured data-sharing and reporting framework

- Develop and launch an annual seasonal operator survey to gather feedback and visitor data from businesses.
- Produce a concise annual destination snapshot to inform Town planning and communications.

**Objective 3:
Plan for Long-
Term Sustainable
Tourism Destination
Management**

Action 3.1: Establish a dedicated tourism role within the Economic Development Office

- Conduct an annual delivery review (capacity, dependencies, risks) and translate results into a prioritized annual tourism work plan with resourcing implications noted.
- Bring a request for a dedicated tourism role to Council through the established 2027/2028 budget review process.

Action 3.2: Explore sustainable tourism funding tools, including a Municipal Accommodation Tax (MAT) with a MAT Implementation Report

- Complete feasibility assessment of current policy conditions and regulatory requirements for implementation (such as a short-term rental licencing program).
- Purchase data on current accomodation inventory and model revenue scenarios using Appendix D: A Practical Guide to Establishing a MAT (pg 10).
- Explore options for an Eligible Tourism Entity (ETE) partnership.

Goal 2: Strengthen Tourism Workforce, Business Readiness, and Industry Collaboration

This goal focuses on strengthening the local tourism sector so businesses, operators, and partners are prepared to deliver coordinated, high-quality visitor experiences.

**Objective 4:
Strengthen Industry
Collaboration
and Network
Development**

Action 4.1: Explore the establishment of a tourism network or advisory structure

- Establish the Innisfil Tourism Network by scheduling semi-annual industry roundtable meetings
- Gather community feedback at the annual Tourism Summit to improve the Asset Map's accuracy and completeness.

Action 4.2: Improve communication between the Town and local operators

- Create a dedicated webpage within the Town's Economic Development section that serves as an information hub for local tourism operators for visitor data, business resources, funding, partnerships, and supports.

**Objective 5: Support
Tourism Workforce
Development and
Career Pathways**

Action 5.1: Strengthen partnerships with education and workforce institutions to promote tourism's career pathways

- Expand on the Town's partnership with Georgian College to create opportunities for tourism entrepreneurs and students to collaborate and innovate.
- Hold annual meeting with post-secondary partners such as Toronto Metropolitan University, Georgian College and Lakehead University, to explore co-op placements, internships, micro-credentials, and experiential learning opportunities in tourism for local students and business owners.

**Objective 6: Enhance
Business Readiness
and Experience
Quality**

Action 6.1: Maintain Annual Tourism Summit to provide industry knowledge-sharing opportunities

- Deliver the annual Tourism Summit focused on collaboration and best practices and opportunities to development across priority themes.

Action 6.2: Support Business Readiness through partnership and grant support

- Partner with regional and provincial tourism organizations to deliver recurring grant/funding readiness sessions (prepare, apply, report).
- Connect tourism businesses to local supports for improving digital presence including, but not limited to, the hosting of educational workshops.
- Support cross-promotion among operators through shared itineraries, shared publications, and cross-functional tourism stands.

DEVELOPMENT

Goal 3: Build a Connected, Visitor-Ready Tourism Destination

Objective 7: Drive Collaborative Tourism Experience Development to Increase Inventory

Action 7.1: Support the development of collaborative visitor-ready experiences

- Support experience development in six priority themes, agritourism and local food, sport and outdoor recreation, festivals and events, fishing, waterfront experiences, and filming, through industry meetings, operator coaching, and funding opportunities.
- Connect operators with Tourism Simcoe County to develop itineraries and products aligned with regional priorities, such as cycling, agritourism, and film.
- Offer an Experience Development coaching program with financial incentives to help operators move ideas to market-ready experiences.
- Work with Tourism Simcoe County to build film industry readiness, including adding tourism businesses to the Ontario Creates Location Library.

Action 7.2: Strengthen shared storytelling and cross-promotion

- Provide opportunities for local businesses aligned with development themes for storytelling opportunities and familiarity (FAM) tours that have operators visit each other's operations.
- Encourage tourism operators to become Tourism Business Ambassadors through the DMZ Program.

**Objective 8:
Strengthen
Relationships with
the Regional Tourism
Ecosystem**

Action 8.1: Maintain alignment and partnership development with regional tourism organizations

- Hold quarterly meetings with Tourism Simcoe County and RTO7 to maintain alignment and identify partnership opportunities and amplification opportunities.
- Work with Tourism Simcoe County and RTO7 on tourism trade show participation, either through Town attendance or partner representation using Innisfil materials.
- Explore partnerships with Lake Simcoe communities to share day-trip information with boaters.

Action 8.2: Connect local operators to regional amplification opportunities

- Work with Tourism Simcoe County to onboard tourism businesses to the Whereabouts platform and maintain accurate listings through quarterly updates.
- Use regional partner channels, including Tourism Simcoe County and BruceGreySimcoe, to amplify Innisfil tourism messaging.

**Objective 9: Improve
Visitor-Facing
Physical and Digital
Wayfinding**

Action 9.1: Improve digital wayfinding and trip-planning tools

- Create a clearer path from the Town homepage to a Tourism landing page for visitors, with sections for Taste of Innisfil, Explore Innisfil, and Shop Innisfil.
- Expand the Plan Your Day Trip section with curated itineraries linked to Innisfil offerings on the Tourism Simcoe County website, and work with regional partners to amplify them.

Action 9.2: Review physical visitor journeys focused on wayfinding and visitor comfort infrastructure

- Conduct a review of the current physical wayfinding and signage inventory, user pathways, visitor comfort infrastructure and gaps in information sharing
- Develop a visitor specific Signage and Wayfinding Strategy informed by gaps in information sharing to guide future investments to improve wayfinding within Innisfil.

Action 9.3: Assess opportunities for physical visitor information hubs

- Assess the feasibility of the Innisfil ideaLab & Library and the Innisfil OnRoute for being a visitor information hub with tourism content available.
- Explore the potential for a digital visitor information hub at Tanger Outlets Cookstown, Gateway Casinos Innisfil, and Friday Harbour Resort as they are a main hub for many visitors.

Goal 4: Improve Conditions for Overnight Stays and Extended Visitation

Objective 10: Support a Range of Accommodation Opportunities

Action 10.1: Undertake an accommodation gap and feasibility analysis

- Complete gap analysis covering STR inventory, demand indicators, and accommodation typologies aligned to product themes and anchors.

Action 10.2: Engage developers and market tourism investment opportunities

- Update targeted investment materials highlighting demand and opportunity and alignment with tourism priorities.
- Identify candidate properties suitable for tourism businesses (accommodations/attractions) and prepare a market-facing opportunity set.

Objective 11: Support Multi-Day itinerary and Package

Action 11.1: Lead the creation of multi-day itineraries and packages

- Work with operators to develop multi-day itineraries around priority themes and include anchor attraction connections.

Action 11.2: Market test itinerary options to inform further development and investment

- Create new package ideas and work with a market research company to test products with core markets.
- Pilot select packages tied to events, seasons, or niche markets.
- Collect visitor feedback and refine offerings before product launch.

Objective 12: Improve Visitor and Workforce Mobility Between Tourism Nodes

Action 12.1: Assess mobility barriers and pilot practical solutions

- Identify priority mobility barriers during peak days and between key destination hubs (eg. Barrie Allandale Station, Friday Harbour Resort, Downtown Alcona, Innisfil Beach Park, Tanger Outlets Cookstown, Gateway Casinos Innisfil).
- Evaluate operational models and partnership options and pilot one feasible mobility improvement (eg. shuttle program between key attractions and Allandale Station).

Goal 5: Establish a Clear and Shared Tourism Identity and Direction

Objective 13: Strengthen Innisfil's identity as one destination across its communities

Action 13.1: Use shared messaging, reporting, and placemaking to reinforce Innisfil as a unified tourism destination

- Produce an annual progress report that links tourism actions to outcomes, including new products, itineraries, placemaking improvements, visitor hub pilots, and key performance indicators.
- Create a Tourism Communications Toolkit for operators that supports consistent destination naming and messaging and positions Innisfil as one community made up of distinct places.
- Create Innisfil-branded placemaking features, such as photo opportunities by local artists, at key visitor areas, festivals, and events.

Objective 14: Integrate Tourism Direction into Municipal Planning

Action 14.1: Embed tourism consideration into policy and planning processes

- Implement a tourism-focused checklist for Town-led projects in tourism nodes (comfort infrastructure, accessibility, signage, visitor flow).
- Review current Planning Policies to find opportunities to make them permissive to tourism development including agri-tourism, waterfront development, and infrastructure planning.
- Integrate visitor-focused placemaking and infrastructure priorities into the Community Improvement Plan (CIP).

Objective 15: Align Investment and Partnership with the Tourism Video

Action 15.1: Align investment attraction and partnerships with key development themes and attraction anchors

- Update investment attraction narrative to reflect tourism priorities (accommodations/attractions, waterfront niche growth, priority experience themes).

Goal 6: Enable Sustainable Tourism Growth that Benefits the Community

Objective 16: Track Strategy Progress and Monitor Community Impacts

Action 16.1: Maintain an implementation tracker and reporting process

- Maintain an implementation tracker with ownership, status, and next steps and provide annual progress report.

Action 16.2: Monitor and respond to community impacts

- Outline KPIs and provide channel for capturing resident feedback related to tourism challenges on an ongoing basis.

Action 16.3: Maintain an Asset Map that reflects local knowledge

- Implement an annual validation cycle at the Tourism Summit for businesses to assess and provide feedback on the Asset Map.

Objective 17: Align Tourism with Environmental Stewardship and Community Well-Being

Action 17.1: Coordinate with local and regional stewardship initiatives

- Engage with local environmental stewardship groups and conservation authorities (LSRCA), and/or industry leaders (ex. GreenStep Solutions) to offer a workshop series to assist businesses with practical, implementable, sustainability initiatives
- Increase shoulder and winter season offerings to balance peak Summer demand (ice fishing supports, winter trails/programming, fall farm experiences)

Action 17.2: Measure and communicate economic impact and community benefit outcomes.

- Conduct periodic tourism economic impact assessments and translate results into storytelling opportunities to the community about the economic benefits of tourism on the Town.

Conclusion

Innisfil's tourism economy is already active and growing, supported by Lake Simcoe and the waterfront, major Highway 400 corridor anchors, and a widening set of local culinary, agritourism, sport, and community event offerings. In 2024, the Town recorded an estimated 685,413 unique visitors across its primary destination hubs and 14,030,414 total visits, reflecting strong visitation and a clear opportunity to increase local economic capture through a more coordinated destination approach.

This strategy reflects strong community and industry interest in tourism that is intentional, balanced, and aligned with resident priorities. Engagement confirms that residents see potential benefits for local business vitality, amenities, and job creation when growth is managed carefully and responsibly. That community buy-in is a significant asset and it creates the foundation to move from ad hoc activity to coordinated destination stewardship, where tourism becomes a tool to advance broader municipal objectives including economic diversification, place vitality, and community well-being.

The greatest risk to achieving the outcomes of this strategy is proceeding with the status quo by continuing to treat tourism as a minor, informal sub-sector without dedicated leadership capacity. Tourism responsibilities are currently carried within broader municipal portfolios, which limits the Town's ability to coordinate partners, support experience development, pursue funding opportunities, and consistently measure and communicate outcomes. Over time, this risks missed returns in several ways such as visitor spending leaking to neighbouring municipalities, slower progress on packaging experiences that extend stays, reduced ability to respond to investment and event opportunities, and missed grant and partnership funding that often requires clear accountability and dedicated delivery capacity. Strategic investment in tourism capacity is therefore not an optional enhancement. It is a prerequisite for implementation. As identified throughout this strategy, maintaining the proposed development timeline is dependent on the Town making focused investments in staff capacity and coordination to sustain momentum.



CASE STUDY CALL-OUT: CORNWALL, ONTARIO (DEMONSTRATING ROI THROUGH REINVESTMENT)³⁵

What Cornwall has done

Created a Tourism Development Fund reinvestment model that channels accommodation revenue back into destination development through a Municipal Accommodation Tax (MAT).

The 2025 Return on Investment

- > **26% increase in visitors**
- > **11% in visitor spending**
- > **10.7% increase in overnight stays**
- > **60% increase in U.S. visitors**

The Investment

\$1 million+

invested since 2019 in community tourism initiatives through the fund

Cornwall's results suggest that sustained tourism investment can lead to stronger visitor growth and greater economic impact.

The implementation framework is designed to be realistic and phased, but it also recognizes that dedicated municipal capacity will be essential to carry out the strategy as intended. The return on investment at stake is not limited to marketing reach. It shows tangible community outcomes including, increased local business revenue, stronger year-round employment, improved activation of public spaces and main streets, and greater leverage of external dollars through grants and partnerships. Innisfil's opportunity is to increase the value captured from visits that are already occurring by strengthening the "connective tissue" of the destination: visitor-ready experiences, wayfinding and information pathways, operator collaboration, and the enabling conditions for longer stays and seasonal balance.

This strategy provides Innisfil with a clear, community-informed roadmap to strengthen tourism as a managed economic system rather than a collection of individual assets. With sustained leadership capacity, the Town can better support local businesses, leverage regional platforms, unlock external funding, and ensure that tourism growth remains aligned with resident quality of life and environmental stewardship. Without that capacity, progress will remain incremental and fragmented, and the Town risks leaving substantial economic opportunity on the table. The choice is not whether tourism will grow in Innisfil, it is whether the Town will be positioned to shape that growth so the benefits are captured locally, managed responsibly, and reinvested in community priorities.



³⁵ City of Cornwall. (2025, December 5). Cornwall in 2025 – A year in review.

Appendices

Appendix A: Implementation Plan

Appendix B: Tourism Trends and Data Analysis

Appendix C: Summary of Community Consultations

Appendix D: Municipal Accommodation Tax Guide



Appendix A: Implementation Plan

Cost Legend

Each action is assigned a cost estimate using the following scale:

N/A No Cost (absorbed in existing budgets or volunteer-led)

\$ - Under \$5,000

\$ \$ - Under \$10,000

\$ \$ \$ - \$10,000 - \$25,000

\$ \$ \$ \$ - \$25,000 - \$75,000

\$ \$ \$ \$ \$ - \$75,000+

Where possible, approximate ranges are provided (e.g., “\$\$\$ = \$10k - \$25k) to aid transparency and funding alignment.

Staff Resource

Yes/No = the initiative being contingent on additional staff support / investment in dedicated tourism capacity

Timelines

The timelines presented in this strategy reflect a realistic sequencing of initiatives to support effective delivery over the proposed five-year period. Achieving these timelines is dependent on the Town of Innisfil making strategic investments in staff positions focused on Tourism development to lead, coordinate, and sustain implementation. As actions advance, the timing of individual initiatives may be refined based on resourcing, partner readiness, and Council-approved priorities; however, dedicated municipal capacity will be essential to carrying out the strategy as intended and maintaining momentum over time.

The timelines within the 5-year timeline are outlined as follows:

- **Short-Term:** Activities starting within Year 1-2 that are quick wins and foundational actions.
- **Mid-Term:** Activities starting in Years 3-4 that contribute to building momentum and scaling up.
- **Long-Term:** Activities starting Years 5+ are larger projects requiring sustained investment or alignment with potential further funding opportunities such as a MAT implementation.
- **Ongoing:** Activities that are already underway or starting soon and intended to continue.

Generally, unless an activity involves a one-time task, most should be considered ongoing once initiated. For example, under Goal 1, Objective 1, developing the investment attraction marketing plan will occur at a single point in time, but related marketing collateral and activities will need to be undertaken, reviewed, and updated regularly over the five-year period to ensure they remain relevant and effective.

Capacity Building; Goal 1: Strengthen Municipal Tourism Leadership, Operational Governance, and Performance Management

Priorities	Action Items	Initiatives	Investment	Staff Resource	Timeline	Accountability	Measurement of Success
Objective 1: Clarify Tourism Leadership and Governance Within the Town	Action Item 1.1: Establish a clear internal governance model for tourism-related decision-making	Define and document cross-department roles for tourism-related files (planning, parks, facilities, roads, transit, comms).	N/A	No	Short-Time	Lead: Economic Development Support: Planning, Recreation & Culture, Operations, Communications	Creation of new Tourism Procedures
		Implement an integrated internal workflow that combines tourism project routing with a single intake and triage process for tourism and filming inquiries (including service standards, escalation, and tracking).	N/A	No	Short-Term	Lead: Economic Development Support: Planning, Recreation & Culture, Operations, Communications	Creation of a new Tourism Inquiry pipeline in TIEIT
	Action Item 1.2: Designate and communicate a clear point of coordination for tourism operators	Confirm and publish a single operator-facing contact pathway (events, filming, wayfinding/signage, referrals)	N/A	No	Short-Term	Lead: Economic Development Support: Communications	Webpage views on operator-facing business support webpage
		Produce and publish local operator support toolkits online (permits, event process, filming basics, partner referrals, funding supports), using existing partner resources where possible.	N/A-\$	Yes	Short-Term	Lead: Economic Development Support: Communications and Industry Partners (TSC, RTO7, TIAO)	Place already available partner resources in online operator communication platform. Publish Innisfil specific extensions to resources or creation of new toolkits on business operations and readiness such as Innisfil content for Filming that adds onto the TSC filming toolkit.

Objective 2: Strengthen Tourism Data Collection, Monitoring, and Reporting	Action Item 2.1: Establish core tourism performance indicators	Confirm KPI set including visitation, seasonality, experience inventory growth (by theme), itinerary uptake, and operator engagement and invest in data gathering sources (eg. Environics, AirDNA, etc.)	\$\$ - \$\$\$	Yes	Short- Term	Lead: Economic Development Support: Industry Partners (TSC, RTO7, TIAO) Destination Ontario and Destination Canada, Potential External Data Companies	Tourism KPIs confirmed and provided in a tracking format Track KPIs annually for the creation of a an annual Annual Visitor Snapshot Report
		Integrate KPIs into annual reporting and internal planning	N/A	Yes	Ongoing	Lead: Economic Development	Tourism KPIs are integrated into future planning plans (#)
	Action Item 2.2: Develop a structured data-sharing and reporting framework	Develop and launch an annual seasonal operator survey to gather feedback and visitor data from businesses.	\$-\$	Yes	Mid-Term	Lead: Economic Development Support: Tourism Operators	Information included into an Annual Tourism Report (ex KPIs, Visitor Numbers, Points of Origin, Length of Stay, Visitor Spend)
		Produce a concise annual destination snapshot to inform Town planning and communications.	N/A-\$	Yes	Ongoing	Lead: Economic Development	Include in Annual Tourism Report Visitor Numbers, Points of Origin, Length of Stay, Visitor Spend
Objective 3: Plan for Long- Term Sustainable Tourism Destination Management	Action Item 3.1: Establish a dedicated tourism role within the Economic Development Office	Conduct an annual delivery review (capacity, dependencies, risks) and translate results into a prioritized annual tourism work plan with resourcing implications noted.	N/A	Yes	Mid-Term	Lead: Economic Development	Annual Staff Resource Review Should include (action on priority items, resource gaps identified, and mitigation options noted
		Bring a request for a dedicated tourism role to Council through the established 2027/2028 budget review process.	\$\$\$\$-\$\$\$\$\$ (approx salary range annually if approved)	Yes	Short- Term	Lead: Economic Development	Staff Resource request submitted for Council consideration through 2027/2028 budget process New Tourism Position Hired
	Action Item 3.2: Explore sustainable tourism funding tools, including a Municipal	Complete feasibility assessment of current policy conditions and regulatory requirements for implementation (such as a short- term rental licencing program)	N/A-\$	Yes	Short- Term	Lead: Economic Development Support: Finance, Legal and Industry Partners	Creation of Municipal Accommodation Tax (MAT) Implementation Report
		Purchase data on current accommodation inventory and model revenue scenarios using Appendix D: A Practical Guide to Establishing a MAT (pg 10)	\$\$-\$\$\$	Yes	Short- Term	Lead: Economic Development Support: Potential Acquisition of External Expertise Team, Data Company	Creation of MAT Implementation Report

		Explore options for an Eligible Tourism Entity (ETE) partnership	N/A-\$	Yes	Short-Term	Lead: Economic Development Partners: Tourism Simcoe County, RTO7, Potential Acquisition of External Expertise Team	Creation of MAT Implementation Report
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Capacity Building; Goal 2: Strengthen Tourism Workforce, Business Readiness, and Industry Collaboration

Priorities	Action Items	Initiatives	Investment	Staff Resource	Timeline	Accountability	Measurement of Success
Objective 4: Strengthen Industry Collaboration and Network Development	Action Item 4.1: Explore the establishment of a tourism network or advisory structure	Establish the Innisfil Tourism Network by scheduling semi-annual industry roundtable meetings	N/A-\$	Yes	Short-Term	Lead: Economic Development Partners: Tourism Operators, TSC, RTO7	Development Terms of Reference for members of the Network and support committees Number of semi-annual meetings held and number of operators engaged
		Gather community feedback at the annual Tourism Summit to improve the Asset Map's accuracy and completeness.	N/A	No	Short-Term	Lead: Economic Development Partners: Tourism Network, Tourism Operators	Feedback mechanism developed for gathering and implementing Asset Map comments
	Action Item 4.2: Improve communication between the Town and local operators	Create a dedicated webpage within the Town's Economic Development section that serves as an information hub for local tourism operators for visitor data, business resources, funding, partnerships, and supports.	\$\$\$-\$\$\$\$	Yes	Mid-Term	Lead: Economic Development Support: Operators, IT, Communications	Development of Industry facing Information Hub on Town website Webpage views on industry information page
Objective 5: Support Tourism Workforce Development and Career Pathways	Action Item 5.1: Strengthen partnerships with education and workforce institutions to promote tourism career pathways	Expand on the Town's partnership with Georgian College to create opportunities for tourism entrepreneurs and students to collaborate and innovate.	N/A	Yes	Mid-Term	Lead: Economic Development Partners: Workforce Organizations and Post-Secondary Institutions	Innovation Week continues biannually tracking the number of businesses and number of students involved

		Hold annual meeting with post-secondary partners such as Toronto Metropolitan University, Georgian College and Lakehead University, to explore co-op placements, internships, micro-credentials, and experiential learning opportunities in tourism for local students and business owners	N/A-\$	Yes	Long-Term	Lead: Economic Development Partners: Workforce Organizations and Post-Secondary Institutions	Meetings held with workforce partners regarding pathways accesses tourism careers and opportunities for placements with local businesses. Tracking the number of workforce programs and number of participants
Objective 6: Enhance Business Readiness and Experience Quality	Action Item 6.1: Maintain Annual Tourism Summit to provide industry knowledge-sharing opportunities	Deliver the annual Tourism Summit focused on collaboration and best practices and opportunities to development across priority themes	\$\$-\$\$\$	Yes	Ongoing	Lead: Economic Development Support: Industry Partners (TSC, RTO7, TIAO)	Annual Hosting of Tourism Summit Event # of tourism operators attending # of industry partners attending
	Action Item 6.2: Support Business Readiness and Funding Readiness through partnership and grant support	Partner with regional and provincial tourism organizations to deliver recurring grant/funding readiness sessions, providing info on how to prepare, apply and report	\$\$-\$	Yes	Mid-Term	Lead: Economic Development Partner: Industry Partners (TSC, RTO7, TIAO)	Workshop(s) offered to tourism businesses with regards to grant and funding opportunities and application techniques
		Connect tourism businesses to local supports for improving digital presence including, but not limited to, the hosting of educational workshops	N/A-\$	Yes	Short-Term	Lead: Economic Development Partners: DMZ, TSC, RTO7, Community Partners	# of Businesses Assisted with Digital Presence Improvement
		Support cross-promotion of tourism offerings among operators by supporting the creation of shared itineraries, shared publications and cross-functional tourism stands	\$\$	Yes	Short-Term	Lead: Economic Development Partners: Operators	Creation of new itineraries and visitor rates amongst partners

Development; Goal 3: Build a Connected, Visitor-Ready Tourism Destination

Priorities	Action Items	Initiatives	Investment	Staff Resource	Timeline	Accountability	Measurement of Success
Objective 7: Drive Collaborative Tourism Experience Development to Increase Inventory	Action Item 7.1: Support the development of collaborative visitor-ready experiences	Support experience development in six priority themes, agritourism and local food, sport and outdoor recreation, festivals and events, fishing, waterfront experiences, and filming, through industry meetings, operator coaching, and funding opportunities.	\$\$\$\$-\$\$\$\$	Yes	Ongoing	Lead: Economic Development Partners: DMZ, TSC, RTO7, Culinary Tourism Alliance, Ontario by Bike, Potential Acquisition of External Expertise Team	# of Development Sessions held annually and # of attendees Descriptions of new Experiences Developed
		Connect operators with Tourism Simcoe County to develop itineraries and products aligned with regional priorities, such as cycling, agritourism, and film.	N/A-\$	No	Short-Term	Lead: Economic Development Partners: TSC, RTO7	# of New Bookable Experience Products created alongside TSC under the themes # of new self-guided itineraries developed with TSC
		Offer an Experience Development coaching program with financial incentives to help operators move ideas to market-ready experiences.	\$\$\$-\$\$\$\$	Yes	Ongoing	Lead: Economic Development Partners: DMZ, RTO7 (if offered), or Consultant Team	# of Businesses Supported Descriptions of the experiences developed and their booking frequency
		Work with Tourism Simcoe County to build film industry readiness, including adding tourism businesses to the Ontario Creates Location Library.	N/A-\$	Yes	Short-Term	Lead: Economic Development Supports: TSC, Tourism Operators	# of businesses engaging with the Film Industry # of listings added to the Ontario Creates Local Library
	Action Item 7.2: Strengthen shared storytelling and cross-promotion	Provide opportunities for local businesses aligned with development themes for storytelling opportunities and familiarity (FAM) tours that have operators visit each other's operations.	\$\$-\$	Yes	Mid-Term	Lead: Economic Development Partners: Communications, Tourism Operators	Annual FAM tour created with other businesses and support partners Create one press release a year related to Innisfil tourism offerings
		Encourage tourism operators to become Tourism Business Ambassadors through the DMZ Program.	N/A	Yes	Mid-Term	Lead: Economic Development Partners: DMZ	# of Tourism Business Ambassadors

Objective 8: Strengthen Relationships with the Regional Tourism Ecosystem	Action Item 8.1: Maintain alignment and partnership development with regional tourism organizations	Hold quarterly meetings with Tourism Simcoe County and RTO7 to maintain alignment and identify partnership opportunities and amplification opportunities.	N/A	Yes	Short-Term	Lead: Economic Development Partners: TSC, RTO7	# of Quarterly Meetings held and meeting minutes with actionable items for regional development
		Work with Tourism Simcoe County and RTO7 on tourism trade show participation, either through Town attendance or partner representation using Innisfil materials.	\$\$-	Yes	Short-Term	Lead: Economic Development Partners: TSC, RTO7	# of trade shows attended or materials shared at by a partner organization
		Explore partnerships with Lake Simcoe communities to share day-trip information with boaters.	N/A-\$	Yes	Mid-Term - Long-Term	Lead: Economic Development Partners: TSC, RTO7, RTO 6, RTO8, Tourism Barrie, Georgina Island First Nation, Orillia Tourism, Explore Georgina, and Municipal Economic Development Departments around the Lake	# of Lake Simcoe boating day trips developed with partner communities
	Action Item 8.2: Connect local operators to regional amplification opportunities	Work with Tourism Simcoe County to onboard tourism businesses to the Whereabouts platform and maintain accurate listings through quarterly updates.	N/A	Yes	Short-Term	Lead: Economic Development Partners: TSC, Tourism Operators	# of businesses listed annually on Whereabouts
		Use regional partner channels, including Tourism Simcoe County and BruceGreySimcoe, to amplify Innisfil tourism messaging.	N/A-\$	No	Short-Term	Lead: Economic Development Partners: TSC, RTO7, DO	# of Collaborative Listings and Marketing Campaigns launched and list of any Innisfil businesses involved.
	Objective 9: Improve Visitor-Facing Physical and Digital Wayfinding	Action Item 9.1: Improve digital wayfinding and trip-planning tools	Create a clearer path from the Town homepage to a Tourism landing page for visitors, with sections for Taste of Innisfil, Explore Innisfil, and Shop Innisfil.	N/A-\$	Yes	Short-Term	Lead: Economic Development Partners: IT

		Expand the Plan Your Day Trip section with curated itineraries linked to Innisfil offerings on the Tourism Simcoe County website, and work with regional partners to amplify them.	N/A	Yes	Short-Term - Mid-Term	Lead: Economic Development Partners: IT	# of Collaborative Listings and Marketing Campaigns launched and list of any Innisfil businesses involved.
	Action Item 9.2: Review physical visitor journeys focused on wayfinding and visitor comfort infrastructure	Conduct a review of the current physical wayfinding and signage inventory, user pathways, visitor comfort infrastructure and gaps in information sharing	\$\$-\$	Yes	Short-Term	Lead: Economic Development Partners: Transportation	Report on the Visitor Journey reporting on gaps in physical wayfinding and comfort infrastructure for visitors
		Develop a visitor specific Signage and Wayfinding Strategy informed by gaps in information sharing to guide future investments to improve wayfinding within Innisfil	\$\$\$-\$\$\$\$	Yes	Mid-Term - Long-Term	Lead: Economic Development Partners: Transportation	Produce recommendations for the including the visitor journey to amend the current Wayfinding and Signage plans
	Action Item 9.3: Assess opportunities for physical visitor information hubs	Assess the feasibility of the Innisfil ideaLab & Library and the Innisfil OnRoute for being a visitor information hub with tourism content available	\$	Yes	Short-Term	Lead: Economic Development Partner: Innisfil Library & IdeaLab	Produce report on the feasibility and process of working with the Library and OnRoute to become information centres for visitors.
		Explore the potential for a digital visitor information hub at Tanger Outlets Cookstown, Gateway Casinos Innisfil, and Friday Harbour Resort as they are a main hub for many visitors	\$	Yes	Mid-Term - Long-Term	Lead: Economic Development Partner: Key Attractions	Produce report on the feasibility and process of working with Tanger Outlets, Friday Harbour and Gateway Casino regarding creation of a digital visitor information hub.

Development; Goal 4: Improve Conditions for Overnight Stays and Extended Visitation

Priorities	Action Items	Initiatives	Investment	Staff Resource	Timeline	Accountability	Measurement of Success
Objective 10: Support a Range of Accommodation Opportunities	Action Item 10.1: Undertake an accommodation gap and feasibility analysis	Complete gap analysis covering STR inventory, demand indicators, and accommodation typologies aligned to product themes and anchors.	\$\$\$ - \$\$\$\$ (depending on project scale and one time data snapshot or ongoing collection)	Yes	Short-Term	Lead: Economic Development Support: Potential Acquisition of External Expertise Team, Data Company	Accommodation Market Report with number of rooms and occupancy, as well as Short-Term Rental inventory
	Action Item 10.2: Engage developers and market tourism investment opportunities	Update targeted investment materials highlighting demand and opportunity and alignment with tourism priorities	N/A-\$	No	Mid-Term	Lead: Economic Development	Investment Materials updated to contain tourism priorities
		Identify candidate properties suitable for tourism businesses (accommodations/ attractions) and prepare a market-facing opportunity set	\$ - \$\$	Yes	Mid-Term	Lead: Economic Development	Investment Attraction Landscape report looking at available inventory for commercial spaces
Objective 11: Support Multi-Day Itinerary and Package Development	Action Item 11.1: Lead the creation of multi-day itineraries and packages	Work with operators to develop multi-day itineraries around priority themes and include anchor attraction connections	N/A-\$	Yes	Short-Term	Lead: Economic Development	Number of collaborations that lead to the creation of new itineraries
	Action Item 11.2: Market test itinerary options to inform further development and investment	Create new package ideas and work with Market Research company to test potential products with core market to inform which to invest in	-\$\$\$\$	Yes	Mid-Term	Lead: Economic Development Partner: Potential Acquisition of External Expertise	Market Test the new Package ideas through the travelling public # of Packages Tested and Results of testing
		Pilot select packages tied to events, seasons, or niche markets	-\$\$\$\$	Yes	Mid-Term - Long-Term	Lead: Economic Development Partner: Tourism Operators, Potential Acquisition of External Expertise	Pilot potential development ideas that had a high-score in market testing # of Packages Piloted and Feedback Captured
		Collect visitor feedback and refine offerings before product launch	\$	Yes	Long-Term	Lead: Economic Development Partner: Potential Acquisition of External Expertise	Annual Report of: # of Packages Launched # of Packages Purchased and feedback collected

Objective 12: Improve Visitor and Workforce Mobility Between Tourism Nodes	Action Item 12.1: Assess mobility barriers and pilot practical solutions	Identify priority mobility barriers during peak days and between key destination hubs (eg. Barrie Allandale Station, Friday Harbour Resort, Downtown Alcona, Innisfil Beach Park, Tanger Outlets Cookstown, Gateway Casinos Innisfil)	\$-\$\$	Yes	Short-Term	Lead: Economic Development Partner: Transportation, Potential Acquisition of External Expertise	Mobility Needs Assessment Developed
		Evaluate operational models and partnership options and pilot one feasible mobility improvement (eg. shuttle program between key attractions and Allandale Station).	\$-\$\$	Yes	Mid-Term	Lead: Economic Development Partner: Transportation, Potential Acquisition of External Expertise	Pilot one new mobility improvement Track success of the program through ridership and anecdotal observations and feedback

Stewardsip; Goal 5: Establish a Clear and Shared Tourism Identity and Direction

Priorities	Action Items	Initiatives	Investment	Staff Resource	Timeline	Accountability	Measurement of Success
Objective 13: Strengthen Innisfil's identity as one destination across its communities	Action Item 13.1: Use shared messaging, reporting, and placemaking to reinforce Innisfil as a unified tourism destination	Produce an annual progress report that links tourism actions to outcomes, including new products, itineraries, placemaking improvements, visitor hub pilots, and key performance indicators.	N/A	Yes	Ongoing	Lead: Economic Development Support: Senior Management Team/Office of the CAO & Presentation to Council	Annual Progress included in Annual Tourism Report
		Create a Tourism Communications Toolkit for operators that supports consistent destination naming and messaging and positions Innisfil as one community made up of distinct places.	N/A-\$	Yes	Short-Term	Lead: Economic Development Support: Communications	Innisfil Tourism Communications Toolkit shared with operators

		Create Innisfil-branded placemaking features, such as photo opportunities by local artists, at key visitor areas, festivals, and events.	\$\$-\$	Yes	Long-Term	Lead: Economic Development Support: Communications, Festivals and Events	# of Innisfil branded placemaking activities created
Objective 14: Integrate Tourism Direction into Municipal Planning	Action Item 14.1: Embed tourism considerations into policy and planning processes	Implement a tourism focused checklist for Town-led projects in tourism nodes (comfort infrastructure, accessibility, signage, visitor flow)	N/A	Yes	Short-Term	Lead: Economic Development	Tourism Focused Checklist Created to be used by other departments to inform their development plans
		Review current Planning Policies to find opportunities to make them permissive to tourism development including agri-tourism, waterfront development, and infrastructure planning.	N/A-\$	Yes	Short-Term	Lead: Economic Development Support: Planning	Report on the Planning Policies and with recommendations for aligning with tourism development
		Integrate visitor-focused placemaking and infrastructure priorities into the Community Improvement Plan (CIP).	N/A	Yes	Short-Term	Lead: Economic Development Partners: Other Municipal Departments	CIP program includes a stream for placemaking visitor-facing infrastructure priorities
Objective 15: Align Investment and Partnerships with the Tourism Vision	Action Item 15.1: Align investment attraction and partnerships with key development themes and attraction anchors	Update investment attraction narrative to reflect tourism priorities (accommodations/attractions, waterfront niche growth, priority experience themes)	N/A or \$ (dependent on internal graphic design capabilities)	Yes	Short-Term	Lead: Economic Development Partners: Communications	Updated investment attraction materials to include tourism's niche opportunities

Stewardship; Goal 6: Enable Sustainable Tourism Growth that Benefits the Community

Priorities	Action Items	Initiatives	Investment	Staff Resource	Timeline	Accountability	Measurement of Success
Objective 16: Track Strategy Progress and Monitor Community Impacts	Action Item 16.1: Maintain an implementation tracker and reporting process	Maintain an implementation tracker with ownership, status, and next steps and provide annual progress report	N/A	Yes	Short-Term	Lead: Economic Development Support: from IT if utilizing internal project tracking system	Implementation Plan tracking included Annual Tourism Report
	Action Item 16.2: Monitor and respond to community impacts	Outline KPIs and provide channel for capturing resident feedback related to tourism challenges on an ongoing basis	N/A	Yes	Short-Term	Lead: Economic Development Support: Communications	Confirm and track KPIs such as crowding, access and use of community shared spaces, and economic impacts

	Action Item 16.3: Maintain an Asset Map that reflects local knowledge	Implement an annual validation cycle at the Tourism Summit for businesses to assess and provide feedback on the Asset Map	N/A	Yes	Short-Term	Lead: Economic Development Support: Tourism Operators, Tourism Network	Asset Map is annually updated and checked for accuracy by Tourism Network and Tourism Operators
Objective 17: Align Tourism with Environmental Stewardship and Community Well-Being	Action Item 17.1: Coordinate with local and regional stewardship initiatives	Engage with local environmental stewardship groups and conservation authorities (LSRCA), and/or industry leaders (ex. GreenStep Solutions) to offer a workshop series to assist businesses with practical, implementable, sustainability initiatives	\$ - \$\$	Yes	Mid-Term	Lead: Economic Development Support: Community Sustainability Groups, Lake Simcoe Region Conservation Authority, Potential of Hiring External Assistance	Workshop(s) offered to tourism businesses with regards to sustainability solutions
		Increase shoulder and winter season offerings to balance peak Summer demand (ice fishing supports, winter trails/programming, fall farm experiences)	\$\$\$-\$\$\$\$\$ (dependent on if experience development is done internally or external consultant hired)	Yes	Short-Term & Ongoing	Lead: Economic Development	Number of experiences developed that are offered outside of the peak Summer season
	Action Item 17.2: Measure and communicate economic impact and community benefit outcomes	Conduct periodic tourism economic impact assessments and translate results into storytelling opportunities to the community about the economic benefits of tourism on the Town	\$\$-\$\$\$	Yes	Mid-Term - Long-Term	Lead: Economic Development Support: Communications and Community Engagement	Economic Impact of Tourism reports shared in the Annual Tourism Report Economic Impact of Tourism shared through a Press Release to local media for the public's attention

Appendix B: Town of Innisfil Tourism Trends and Data Analysis

Prepared by: KLB Consulting
December 2025



Executive Summary

Tourism in Innisfil is entering a moment of great possibility. As travel behaviour across Canada and Ontario shifts toward closer-to-home experiences that feel meaningful, easy to plan, and grounded in local identity, Innisfil is increasingly well positioned to meet this demand. The community's lakefront setting, evolving neighbourhoods, and growing mix of cultural and recreational amenities give it a natural foundation for becoming a preferred short-break and day-trip destination for the Greater Toronto Area (GTA) and wider region.

The data shows that this foundation is already taking shape. Innisfil draws a diverse mix of visitors, from affluent suburban families to culturally diverse urban households, active rural couples, and younger adults seeking social and waterfront experiences. Visitation patterns reflect high familiarity and repeat travel, with strong summer and holiday season demand and rising interest in the shoulder seasons. Longer-distance visitors are increasing as well, particularly to Friday Harbour and Tanger Outlets, signalling growing recognition of Innisfil as more than a local stop.

At the same time, national and provincial trends reinforce what these visitors are looking for. Travellers want connection to nature, approachable cultural experiences, authentic food and drink, and activities that fit easily into busy schedules. They plan trips digitally, expect up-to-date, accurate information, and are increasingly attentive to sustainability and community character. These are all areas where Innisfil has both strengths and room to shape its own identity.

At a local level, the Town's recent strategies reflect a municipality ready to guide the next stage of tourism development. Investments in data tools, marketing systems, parks, trails, waterfront spaces, cultural programming, and business support show a maturing approach to managing the visitor economy. Tourism is no longer viewed as a stand-alone industry, but as part of a larger effort to enhance quality of place, support local businesses, and strengthen community pride.

Across all levels of analysis, three themes consistently emerge as the centre of Innisfil's tourism opportunity:

- 1. Experiences that reflect local character – for Innisfil this includes the lake, outdoor recreation, culinary-and-maker culture, and small-town warmth.**
- 2. Digital visibility and data-driven decision-making – essential for meeting traveller expectations and improving market readiness.**
- 3. Sustainable, community-aligned development – ensuring tourism enhances, rather than disrupts, resident life and local identity.**

These insights point toward a visitor economy with significant potential to be rooted not in massively increasing volume, but in deepening value. By designing experiences that feel authentic, inclusive, and connected to place, Innisfil can grow in a way that benefits residents, businesses, and visitors alike.

This Data and Trends Analysis now serves as the foundation for the next stage of the Tourism Strategy. Forthcoming deeper conversations with tourism partners will build on these insights by working directly with operators, partners, and community members to refine priorities and shape a plan that reflects Innisfil's aspirations and the evolving expectations of today's travellers.

Introduction

Tourism in Innisfil sits at a pivotal moment of opportunity. With its prime location on the shores of Lake Simcoe, a growing and diverse population, and easy access to the GTA, the Town is well positioned to strengthen its visitor economy in ways that celebrate local identity and enhance quality of life for residents. As Innisfil continues to evolve, so too does its potential to become a destination that reflects both the authenticity of small-town Ontario and the ambition of a modern, future-focused community.

This *Data and Trends Analysis* represents the first phase in developing a comprehensive five-year *Tourism Strategy and Asset Map* for the Town of Innisfil. It serves as an evidence-based foundation, providing the insight needed to guide strategic decision-making and shape the next stages of engagement with stakeholders. By examining the patterns that define how, why, and where people are travelling, this report illuminates how global and national trends intersect with Innisfil's local tourism ecosystem.

The analysis that follows draws on an environmental scan of the tourism landscape, encompassing information from leading organizations across multiple geographical scales. Nationally, data from *Destination Canada (DC)* and *Statistics Canada (StatsCan)* outlines the performance of Canada's tourism economy, recovery trajectories, and the evolving motivations of travellers. Provincially, insights from *Destination Ontario (DO)* and the *Tourism Industry Association of Ontario (TIAO)* highlight the market dynamics and consumer trends influencing Ontario's visitor economy. Regionally, strategies and data from the *Regional Tourism Organization 7 (RTO7)* and *Tourism Simcoe County (TSC)* illustrate how collaboration, product development, and destination stewardship are shaping tourism growth across Central Ontario. Locally, the Town's economic development documents, visitor data, and past tourism planning efforts reveal how Innisfil's tourism identity is emerging and where it is poised to grow next.

This report uses a data and trends analysis framework to interpret those sources. Rather than simply compiling statistics, it seeks to understand the broader story the data tells: where visitor demand is coming from, how spending and travel motivations are changing, and what that means for Innisfil's competitiveness as a destination. It examines how tourism interacts with key issues such as sustainability, digital transformation, and workforce readiness, drawing connections between external market conditions and the community's own tourism assets.

These insights create a foundation for the development of a strategic plan that is both aspirational and grounded in evidence. The sections that follow move from national and provincial trends through to the regional context and finally to Innisfil's own tourism landscape, tracing the data narrative from the macro to the local level.

National Tourism Outlook (Canada)

TABLE 1. KEY NATIONAL TOURISM INDICATORS (2024)

Indicator	2024 Value	Year-over-Year Change (2023 - 2024)
Total Tourism Revenue	\$129.7 B	+3.5%
Tourism GDP Contribution	1.8% of National GDP	+3.6%
International Arrivals	19.9 M	+8.6%
Domestic Trips	105.6 M	+8.8%
Job Vacancy in Tourism	4.2%	+2%

Source: Destination Canada (2025), *The Contribution of Tourism in 2024*.

Performance Overview

Canada's tourism economy continues to demonstrate strong recovery and renewed vitality following the major disruption to travel caused by the Covid-19 pandemic in recent years. Destination Canada, Statistics Canada and the Canadian Tourism Data Collective's 2025 report *The Contribution of Tourism in 2024*, highlights that the sector contributed **\$129.7 billion** in total revenue and accounted for **1.8% of national GDP**, marking a return to near pre-pandemic levels of economic activity¹.

Domestic travel has been the key driver in this economic rebound, accounting for 76.1% of total tourism demand, with **overnight domestic travel reaching an all-time high in 2024 with 105.6 million trips contributing \$98.6 billion in revenue** (DC et al., 2025). International visitor figures fall just shy of pre-pandemic numbers but show a strong year-over-year increase, with nearly **20 million international visitors contributing \$31.1 billion in tourism revenue** (DC et al., 2025). International travel has been challenged with a number of complex geo-political issues, including numerous global conflicts and volatility in travel and trade policies with our number one international market coming from the U.S. Strategic marketing efforts to the U.S. border communities has kept the cross border drive market strong, and air travel has been increasing from European and emerging Asian markets, as well as the recent announcement of Canada returning to the approved list for Chinese group travellers, ensures sustainable growth in the international market (CBC News, 2025).

¹ 2024 marks the first year to reach pre-pandemic revenues in inflation-adjusted terms.

Tourism businesses across Canada are supported by a workforce of more than 2 million people, and 1 in 10 workers in the Canadians work in tourism (DC et al., 2025). This underscores the sector's role as a cornerstone of Canada's service economy. While there has been improvement in the job vacancy rate, falling 2% age points between 2023 – 2024 to 4.2%, in line with pre-pandemic ranges, labour shortages persist, particularly in rural and resort destinations (DC et al., 2025). Efforts to modernize the tourism workforce through automation, flexible work models, and training will be critical for sustaining quality and competitiveness. Working across government levels and portfolios on issues like affordable housing and dedicated skills training will be necessary to increase available workforce in tourism (DC et al., 2025).

Looking ahead, the Canadian Tourism Data Collective (CTDC)'s Tourism Outlook 2025-2030 Dashboard, **forecasts steady growth through 2030, with annual tourism total revenue surpassing \$150 billion by 2030**. Domestic travel will remain a stabilizing force, while international markets will diversify, led by the U.S., the U.K., France, and re-emerging Asian economies (CTDC, 2025).

National Implications for Innisfil

For the Town of Innisfil, these national tourism trends signal both opportunity and responsibility. As domestic travellers continue to favour nearby, experience-rich destinations, towns within a two-hour drive of major metropolitan areas and close by major airports are well placed to capture this healthy domestic market.

According to DC's 2024 *Global Traveller Research Program: Canada Highlights Report*, **Canadian travellers were motivated by experiences that balance authenticity, relaxation, and connection to nature** such as nature walks, natural attractions, oceanside beaches, trying local food and drink, and attending local markets. Sustainability and regenerative tourism options are increasingly factored into Canadian's destination choice, placing the highest importance on knowing their money directly supports the local community (DC, 2024).

By leveraging these national trends, particularly the growth of domestic travel and demand for meaningful, place-based experiences, Innisfil can position itself as a contributor to Canada's next decade of tourism growth.

Provincial Tourism Outlook (Ontario)

TABLE 2. KEY PROVINCIAL TOURISM INDICATORS

Indicator	Value
Total Tourism Revenue	\$30.7 B *(predicted 2025)
Tourism GDP Contribution	\$29.7 B *(predicted 2025)
Domestic Trips	119.6 million visits in 2024
Direct Jobs	290,004

Source: TIAO 2025, StatsCan 2025

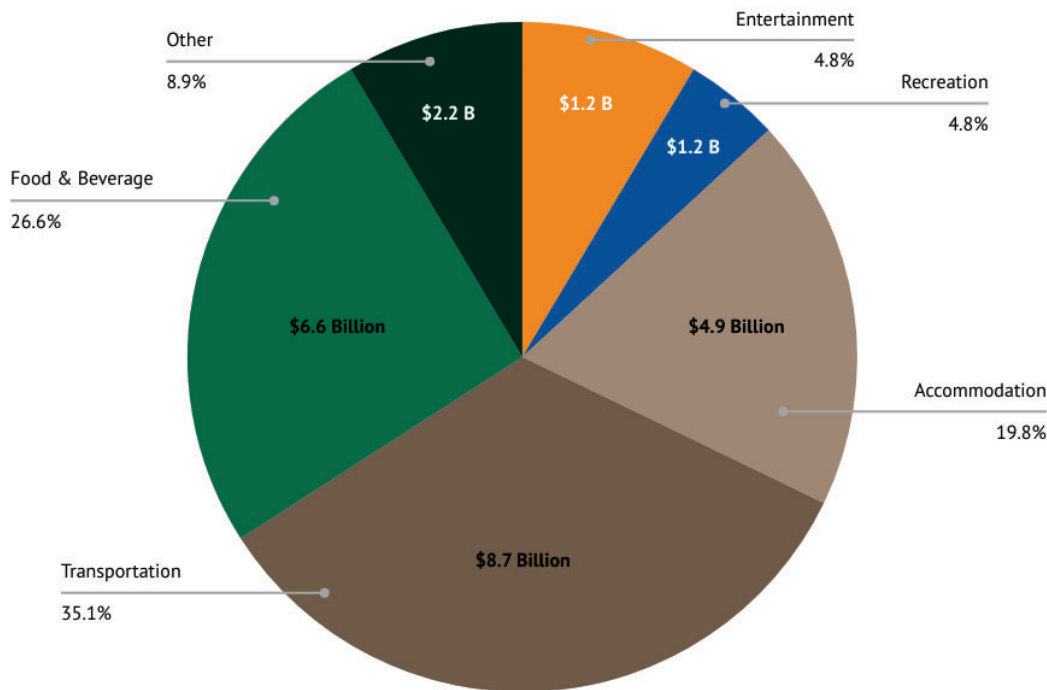
Ontario's visitor economy is entering a period of renewed growth that combines recovery from recent industry disruptions with a more intentional focus on long-term competitiveness, collaboration, and sustainability. As the nation's leader in total visitation, the province is positioning tourism as both an economic driver and a contributor to community well-being, guided by more adaptive, data-informed planning. This evolution reflects changing traveller expectations, cost pressures, and a broader appetite for experiences that feel meaningful, accessible, and responsible.

Domestic travel continues to dominate the provincial tourism market. Canadians made nearly 120 million visits to Ontario in 2024, most commonly to visit friends and relatives (45%), for holidays and leisure (37%), or for shopping and other personal reasons (1%). Approximately two-thirds (66%) of these visits were same-day trips, and only 12% involved overnight stays of one or two nights (StatsCan, 2025). **Ontario residents accounted for 94% of all domestic visits within the province**, reinforcing the importance of local and regional day-trip markets. Visitors from Quebec made up 4% of trips while all other provinces each accounted for less than 1% (StatsCan, 2025). Cost pressures, unfavourable exchange rates, and global geopolitical uncertainty have further encouraged travellers to stay closer to home (CRG & DO, 2025). According to Destination Canada's *Wealth and Wellbeing Index*, **Ontario is experiencing its highest-ever geographic dispersion of tourism spending, with 35% of total spending now occurring outside of traditional hotspots** such as Toronto, Niagara, and Muskoka (DC, 2025).

Visitor spending reflects these travel patterns. **In 2024, travellers spent \$24.8 billion in Ontario**, with transportation representing the largest expenditure category at \$8.6 billion. Car travel remains the dominant mode of travel, with \$4.8 billion spent on vehicle operation costs, including fuel and repairs, followed by \$2.8 billion spent on commercial transportation such as air, bus, and rail (StatsCan, 2025).

FIGURE 1. 2024 DOMESTIC TRAVEL SPEND IN ONTARIO.

Total \$24.8 billion in spending



Source: StatsCan, (2025), *Canadians visiting Ontario: Shorter trips, but many of them*

The Tourism Industry Association of Ontario (TIAO)'s Strategic Tourism Playbook (2025) outlines the province's growth outlook for the remainder of the decade. **Visitor spending is expected to reach \$30.7 billion in 2025**, translating into a GDP impact of \$29.7 billion. Under a modest annual growth rate of 2%, spending would reach \$33.9 billion by 2030, with further upside possible under stronger coordinated growth scenarios (TIAO, 2025).

Intention to travel to and within Ontario according to insights from Destination Ontario's October 2025 Ontario Travel and Tourism Monthly (OTTM). **79% of Ontario residents plan to travel within the province in the next 12 months and the U.S. drive market remains robust, with 66% expressing intent to visit Ontario** in the same period (CRG & DO, 2025). Residents anticipate taking an average of 3.7 day trips and 1.8 overnight trips to destinations across Ontario, with travel interest peaking from May through August and rising again during December holiday travel (CRG & DO, 2025).

Three broad shifts are defining Ontario's tourism trajectory. First, **travellers are placing a growing emphasis on experiential four season travel, seeking activities that feel immersive, community-based, and tied to local culture**. More than half of respondents in the 2025 Ontario Consumer Study prefer destinations that allow connection with local people and culture. With nearly 60% of Ontarians travelling especially for culinary, shopping, and nature-based experiences (CRG, 2025).

Second, **sustainability and inclusivity are increasingly influencing travel decisions**. TIAO's Playbook calls for unified action on sustainable tourism standards, waste reduction, and equitable access to outdoor experiences.

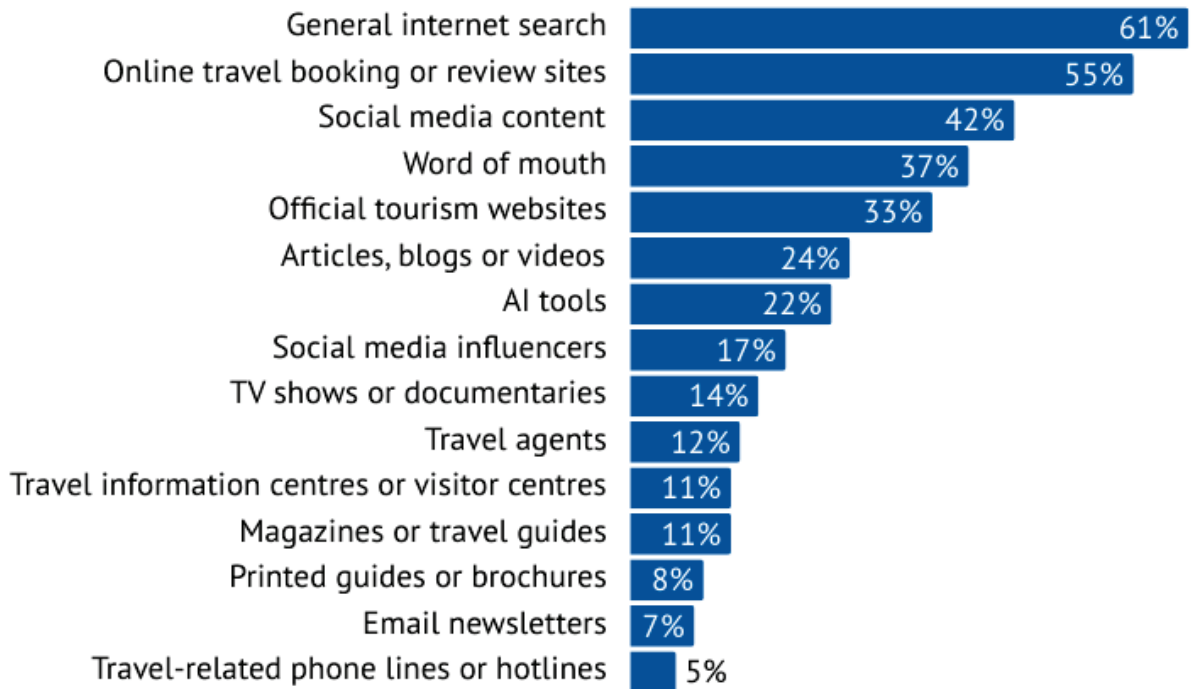
Third, the **increasing integration of digital tools and AI** into everyday life is reshaping how travellers plan, research, and customize their trips. Operators and destinations will need to ensure they're discoverable through platforms that influence traveller behaviour and can be recognized by AI research tools.

Brand perception research reinforces these shifts and Ontario's appeal continues to rest on its cultural diversity and strong seasonal variety. Throughout the year, visitors consistently seek retail and shopping experiences, family attractions, and cultural or heritage sites. Seasonal interests shift throughout the season based on the weather. Spring and summer draw visitors to outdoor leisure activities such as food, cultural, and music festivals, culinary experiences, as well as outdoor recreation such as hiking, cycling, and golf, and water-based activities such as boating, fishing, and beach visits. In fall, scenic drives, hiking, harvest events, and exploring historic towns rise in popularity as well as harvest-based activities such as farmers markets, farm-to-table culinary experiences and fall fairs. Winter demand pivots to indoor culinary and cultural experiences, spa and wellness activities, and snow-based recreation, including skiing, snowmobiling, ice fishing, and skating (OTTM, October 2025).

Cultural tourism remains one of Ontario's most powerful economic drivers. The Destination Canada Wealth and Wellbeing Index (2025) notes that the province is home to nearly 160 cultural groups and 3,000 cultural experiences, supported by over \$474 million provincial investment in arts and cultural tourism in 2022. Research from the Ontario Arts Council (2023) highlights that **arts and culture based trips generate nearly three times the economic impact of non-arts trips and attract significantly longer stays**, and 40% of arts travellers take trips of three days or more, compared with just 13% of non-arts travellers.

Changing digital behaviour continues to underscore the importance of online visibility and discoverability. More than 61% of travellers begin their trip planning with general internet searches, followed by 55% who consult review or booking sites, and 42 % who use social media for inspiration (CRG & DO, 2025). Early adoption of AI tools is already shaping how trips are researched with one in five travellers using AI for itinerary planning, including to research attractions and destination ideas (CRG & DO, 2025). Social media also remains a key source of travel information, with Instagram, Facebook, and YouTube remaining the top used platforms, followed by TikTok and Reddit (CRG & DO, 2025).

FIGURE 2. SOURCES FOR TRAVEL INFORMATION (OCTOBER, 2025).



Source: CRG & Destination Ontario, Ontario Travel & Tourism Monthly, October 2025.

Provincial Implications for Innisfil

Ontario's tourism outlook underscores the importance of coordinated provincial action and clarifies how municipalities and destination management organizations contribute to long-term sector competitiveness. TIAO's *Strategic Tourism Playbook* outlines key roles that Destination Marketing/Management Organizations (DMOs) and municipal governments and economic developers play in aligning with Ontario's tourism goals. In Innisfil, the role of DMO and municipal government overlap within the Economic Development department. As a department, Economic Development plays the role of DMO in building collaboration across the tourism network, aligning regional marketing, sharing data and information, and supporting experience development, while also playing the role of municipal government with providing workforce training and business development, supportive land-use planning, transportation and housing infrastructure and policies that strengthen and support tourism development.

FIGURE 3. ROLE OF DMOS AND MUNICIPAL GOVERNMENTS & ECONOMIC DEVELOPERS IN ONTARIO'S TOURISM STRATEGY.

Destination Marketing and Management Organizations (DMOs)

Role: Local destination stewards and promoters.

Responsibilities:

- Local tourism strategic development
- Execute place-based marketing and programming
- Support tourism businesses
- Destination management investments and activities
- Advocate for local tourism needs

Relationship: Coordinate with municipalities, RTOs, Destination Ontario, TIAO and Sector Organizations, work closely with operators to shape and promote experiences.

Municipal Governments & Economic Developers

Role: Enables of local tourism infrastructure, investment, development, and operations.

Responsibilities:

- MAT implementations, industry consultation, destination marketing and management (i.e., municipal service corporations)
- Approve land use, zoning, bylaws, and development
- Deliver infrastructure and services that support tourism
- Economic development and investment

Relationship: Collaborate with operators, DMOs, RTOs, and provincial government on shared economic development goals.

Source: TIAO, 2025, *Ontario's Strategic Tourism Playbook 2025-2030*.

These roles provide a useful lens for understanding Innisfil's opportunities within the evolving provincial landscape.

1. Strengthen Four-Season, Community-Connected Experiences

Demand for meaningful, locally rooted travel continues to grow across the province, driven by domestic day-trippers and short-break travellers. Innisfil can respond by shaping four-season experiences that reflect its lakeside setting, agriculture character, and emerging creative sector. Enhancing small cultural events, outdoor recreation, and winter culinary or wellness offerings aligns directly with provincial interest in place-based, experience-rich travel.

2. Support Workforce and Access Solutions in Line with Provincial Priorities

TIAO identifies in the Strategic Playbook that workforce fragility and transportation gaps are two of Ontario's most pressing barriers to tourism growth.

Innisfil can contribute by improving local mobility infrastructure, strengthening connections to regional routes and the GTA, and partnering with education and industry organizations on skills development. The planned Innisfil Go station project would be a catalyst for further regional travel, making Innisfil more accessible from the GTA for residents that don't own vehicles. Municipal actions related to zoning, community improvement programs, staff housing, and transportation also align with TIAO's call for proactive municipal leadership.

3. Enhance Digital Visibility and Integration with Provincial Pathways

Most Ontario travellers now plan their trips through online search, social media, and emerging AI tools, making digital visibility a core requirement for competitiveness. Innisfil can align with provincial best practices by improving online content, standardizing listings, participating in provincial and regional marketing programs, and ensuring experiences are discoverable across digital and AI-enabled platforms. This supports the DMO role identified in TIAO's Playbook as a collaborator with other industry networks to increase reach within the provincial visitor economy, as well as engaging operators on the best practices to make their information discoverable.

Regional Tourism Outlook (RTO7 and Simcoe County)

The Regional Tourism Organization 7 region continues to solidify its position as one of the province's most diverse and experience-driven tourism regions. Spanning the counties of Simcoe, Grey, and Bruce, the area plays a pivotal role in the province's tourism economy, capturing nearly one in every five visitors to Ontario. Collectively, this area represents an ecosystem of lakeside towns, rural communities, and four-season resorts that collectively illustrate the province's strengths: outdoor recreation, farm-to-table culinary excellence, and a growing reputation for sustainable and experiential tourism development.

Regional Tourism Organization 7 (RTO7)

The RTO7 *Five-Year Destination Development Strategy (2024–2029)* outlines a major shift in the region's tourism approach, moving from traditional destination marketing toward a more comprehensive destination management model. This direction reflects broader trends shaping the BruceGreySimcoe region, where tourism must balance strong visitor demand with community well-being, environmental stewardship, and year-round economic resilience. RTO7 positions tourism as a “force for good,” a tool to protect local identity, enhance quality of life, and generate sustainable economic growth (RTO7, 2023).

The 2024/2025 Sustainability Report points to a healthy and active tourism economy, with Municipal Accommodation Tax revenues exceeding **\$2 million across five municipalities in 2024** suggesting strong overnight visitation and steady demand for accommodations (RTO7, 2025). Investments such as the installation of more than **200 EV charging stations** reflect the region's growth as a drive-to destination and the increasing expectations of visitors for sustainable travel infrastructure (RTO7, 2025). These trends, combined with rising interest in nature-based and experience-led travel, underscore the opportunity for tourism growth in RTO7 if it's well managed through coordinated regional planning.

Sustainability has become a defining feature of the region's tourism direction, emphasized through their GreenStep Silver Certified Destination Status (RTO7, 2025). RTO7 has expanded its sustainability programming significantly, adding new sustainability coaches to the T3 Accelerator, hosting workshops and focus groups, developing tools that help operators adopt environmentally and socially responsible practices, and connecting operators with Georgian College students for sustainability assessments (RTO7, 2025). The **Visit Responsibly** initiative has gained widespread traction, with **93 % of engaged stakeholders** now communicating responsible travel messages to visitors (RTO7, 2025). This shift signals a broader cultural movement across the region toward stewardship, education, and shared responsibility for protecting natural and cultural assets.

Alongside sustainability, **RTO7's strategy emphasizes digital transformation, data-informed decision-making, and stronger regional coordination** (RTO7, 2023). As part of its data-informed approach, RTO7 is placing stronger emphasis on understanding visitor behaviour through detailed segmentation analysis. Environics PRIZM data identifies several high-value traveler segments, most notably “Wealthy & Wise” and “Mature & Secure”, that demonstrate both higher household incomes and a strong inclination toward sustainable and immersive travel experiences (RTO7, 2024). These groups tend to be environmentally aware, willing to pay for quality, and aligned with RTO7's broader commitment to responsible tourism, making them priority audiences for regional initiatives. At the same time, RTO7 uses PRIZM insights to support operators who cater to visitors with more diverse motivations, including segments that prioritize affordability or convenience over sustainability. By helping tourism businesses understand the needs and preferences of both sustainability-minded and value-driven travelers, RTO7 ensures that the region can respond to a broad visitor base while still advancing its long-term sustainability goals (RTO7, 2024).

RTO7 also maintains a strong role in capacity building across the region. Programs delivered through the T3 Accelerator offer coaching in marketing, finance, human resources, and sustainability, helping operators enhance their readiness and business resilience (RTO7, 2025). The organization provides funding partnerships, technology adoption support, and toolkits that guide experience development, filming activity, and workforce advancement. Its ongoing work with municipalities to implement and manage Municipal Accommodation Tax policies ensures that local tourism revenues are reinvested in strategic development and community priorities (RTO7, 2025).

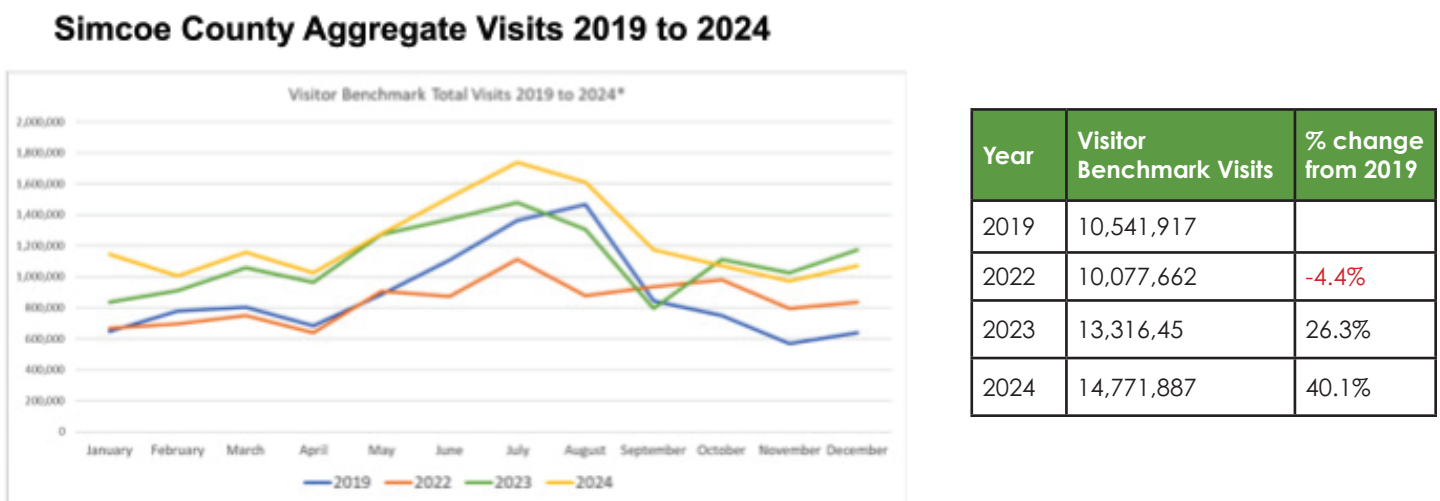
Introducing people to the opportunities available to make a meaningful career in tourism is also a priority for RTO7. Their *Careers in Tourism* video series garnered over 1.2 million views, sharing tourism jobs as meaningful career opportunities. They also provided a program focused on engaging high school students in hands-on hospitality challenges with 250 students at 12 schools participating (RTO7, 2025).

These initiatives reflect a regional tourism system that is evolving toward greater sustainability, collaboration, and long-term competitiveness.

Tourism Simcoe County

Simcoe County represents the largest tourism market within the RTO7 region and continues to play a defining role in shaping Central Ontario's visitor economy. According to Tourism Simcoe County's Visitor Insights data from Environics Analytics, the region attracted **14.7 million visits in 2024**, the highest volume recorded in the past five years and more than **40 % above 2019 pre-pandemic levels** (BP Insights, 2025).

FIGURE 4. SIMCOE COUNTY AGGREGATE VISITS (2019-2024).



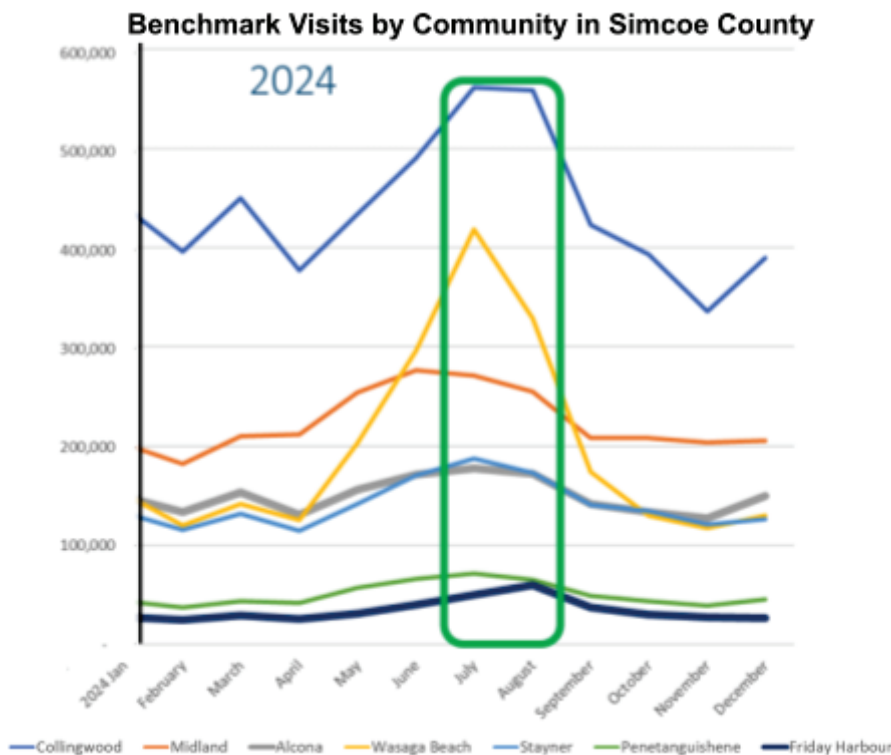
Source: Tourism Geofence Project, BP Insights, 2025

¹ Benchmark Visits will double count people who visit more than one community in the county

Growth has been driven by strong year-round demand in destinations such as Collingwood and Midland, combined with significant summer activity in Wasaga Beach (BP Insights, 2025). Smaller rural and lakeside communities across the county are also benefiting from this momentum, signaling meaningful potential for broader regional dispersion.

Visitors stay an average of **2.7 nights** (County of Simcoe, 2022), although this varies across communities. Major hubs attract longer stays, while day-trips from the GTA continue to dominate visitation in smaller rural and shoreline communities (BP Insights, 2025). This combination of high visitation and varied trip patterns highlights both the diversity of Simcoe County's tourism economy and the opportunity to strengthen complementary experiences across communities.

FIGURE 5. SIMCOE COUNTY VISITS BY COMMUNITY (2024).



Source: Tourism Geofence Project, BP Insights, 2025

The *One Together Strategy* (2023–2026) provides the overachieving framework for this growth, positioning Tourism Simcoe County as a coordinated and sustainability focused regional partner. The strategy emphasizes strengthening relationships with local communities, ensuring tourism benefits are shared equitably, and protecting cultural and natural assets. It also prioritizes education, capacity-building, and the expansion of data and research to support evidence-based decision making (TSC, 2025).

Simcoe County's future competitiveness lies in diversifying its offerings while preserving the natural landscapes and rural character that make the region distinctive. Tourism Simcoe County has identified three priority pillars for experience development: **agritourism, cultural tourism, and outdoor recreation** (TSC, 2022). These sectors align with existing visitor demand and offer opportunities for higher-value, experience-driven development.

Agritourism

Agritourism continues to emerge as one of the region's most promising growth areas, supported by the *Made in Simcoe County* brand, which highlights growers, producers, makers, and manufacturing sectors across the region. The *Agritourism Development Toolkit* (2024) outlines the potential for farm-based experiences that connect visitors to local food systems through activities such as harvest dinners, farm stays, workshops, and “meet the maker” events (TSC, 2024). These offerings respond to a growing visitor appetite for hands-on, authentic experiences that reflect local culture and production.

The toolkit also identifies barriers, including zoning requirements, infrastructure limitations, and the need for regulatory clarity, that must be addressed to unlock further growth. The County's *Craft Beverage Development Toolkit* (BCHughes, 2024) parallels this work by outlining pathways for breweries, cideries, and distilleries to collaborate on events, beverage trails, and shared storytelling that contribute to a broader regional brand. This collection of toolkits provide a roadmap for strengthening agritourism and food-and-drink experiences that benefit communities across Simcoe County.

Cultural Tourism

Simcoe County's cultural tourism sector continues to expand through investments in festivals, heritage experiences, and creative industries. The County has initiated development of a *Film Industry Toolkit* (2025) to support growing interest in filming across the region. This resource provides guidance on permitting, highlights local assets, and helps communities better understand how to benefit from production activity.

Additional cultural initiatives focus on storytelling and event development, including enhanced promotion and training for festival organizers, expansion of the Barn Quilts of Simcoe County route, and continued growth of *Doors Open Simcoe County* (TSC, 2025). These efforts strengthen cultural identity and provide visitors with meaningful opportunities to engage with the County's heritage, creativity, and community life.

Outdoor Tourism

Outdoor tourism continues to be one of Simcoe County's strongest visitor draws, with activities such as cycling, paddling, hiking, and golf contributing to a vibrant four-season tourism economy. In 2024, the **economic impact of cycling alone was estimated at \$1.8 million in visitor spending**, underscoring the value of the region's trail and active transportation network (TSC, 2025). To support this growing interest, Tourism Simcoe County has identified cycling enhancements as a priority area and has begun piloting new initiatives, including the installation of e-bike charging stations in Midland and Severn (TSC, 2025).

Additional outdoor development work includes expanding paddling routes, completing trail audits and improvements such as launching the Barrie – Collingwood Railway (BCRY) trail corridor. Golf remains a key offering supported through a partnership with Golf in Ontario, with dedicated marketing and media collaborations, while motorcycle touring continues to gain traction through targeted promotion (TSC, 2025).

Partner Supports and Regional Collaboration

Tourism Simcoe County reinforces its support for a strong collaborative regional tourism network by creating practical avenues for operators to build capacity and participate more fully in the industry. Through business consultations, training opportunities, partner product tours, newsletters, and data and research, the County helps operators stay informed and aligned with regional priorities. They also provide funding programs and grant administration creating lower barriers for businesses and communities to enhance experiences or pilot new initiatives (TSC, 2025). These supports strengthen collaboration across the sector, improve market readiness, and help ensure that tourism growth across Simcoe County is coordinated, sustainable, and grounded in regional value.

Regional Implications for Innisfil

The directions set by RTO7 and Tourism Simcoe County create meaningful openings for Innisfil to participate more fully in regional tourism development. Three opportunities stand out as particularly well aligned with Innisfil's assets and future direction.

1. Align with Regional Sustainability Leadership

RTO7's sustainability programs, "Visit Responsibly" initiative, and expanded coaching create a clear pathway for Innisfil to strengthen its own stewardship practices. By participating in regional workshops, integrating responsible travel messaging, and applying sustainability tools to lakeshore, trail, and nature-based experiences, Innisfil can reinforce a shared regional commitment to regenerative tourism.

2. Develop Experiences within Regional Priority Pillars

Tourism Simcoe County's focus on agritourism, cultural tourism, and outdoor recreation mirrors opportunities already emerging in Innisfil. Supporting farm-based experiences, enhancing small cultural events, and improving outdoor amenities that connect to regional trail, cycling, or paddling networks would enable Innisfil to contribute experiences that complement and extend regional offerings.

3. Leverage Regional Marketing, Digital Tools, and Business Supports

RTO7 and Tourism Simcoe County offer a suite of marketing, data, and operator-readiness tools that can increase Innisfil's visibility and competitiveness. Using platforms like Whereabouts, participating in regional digital campaigns, accessing geofencing data from Environics Analytics, and drawing on business coaching and funding partnerships would help Innisfil's operators better engage visitors and integrate into regional travel patterns.

³The Unique Visitors data point captures each individual once within that geofence. Daily Visits will count the same visitor every time they enter the geofence.

The Current Tourism Context in Innisfil

Innisfil's visitor economy is in a formative phase, shaped by strong regional tourism activity and a growing local appetite for identity-driven development. Anchored by Lake Simcoe, Highway 400 access, and a blend of rural and urban neighbourhoods, the town is naturally positioned as a convenient, lifestyle-oriented destination for short break and day trip markets. Data collected through geofenced mobility tracking and segmentation analysis confirms that the foundation for tourism growth is firmly in place. What is now emerging is the need for a shared direction to move from volume-based visitation, towards richer, value-oriented visitor experiences.

The Environics Analytics Geofence Project (BP Insights, 2025) captures visitation across Innisfil's four key tourism hubs: Alcona, Friday Harbour, Gateway Casino, and Tanger Outlets. Combined, these sites attracted approximately **685,413 unique visitors**³ in 2024, a modest increase of **3.4%** from the previous year. (BP Insights, 2025). Alcona and Tanger Outlets continue to account for the largest share of unique visitors, while Friday Harbour experienced steady growth and Gateway Casino saw a decline in visitors.

TABLE 3. YEAR-OVER-YEAR CHANGE IN TOTAL UNIQUE VISITORS BY LOCATION (2023-2024)

Location	2023 Unique Visitors	2024 Unique Visitors	Year over Year
Alcona	253,671	274,772	8%
Friday Harbour	47,022	49,881	6%
Gateway Casino	34,609	18,629	- 46%
Tanger Outlets	327,405	342,145	5%
Total/Average	662,694	685,413	3%

Source: BP Insights, 2025. Innisfil Tourism Geofence Project 2024. Unique Visitors.

Although unique visitors increased, total visits decreased slightly across most locations, with the exception of Friday Harbour. Alcona recorded approximately 9.8 million total visits in 2024, followed by Tanger Outlets (3.3 million), Friday Harbour (744,000), and Gateway Casino (145,000) (BP Insights, 2025). More notably, visitors traveling from beyond 40 kilometers grew by 15%, indicating rising awareness of Innisfil among non-local audiences and a strengthening of planned day-trip behaviour (BP Insights, 2025). Longer-distance visitors are most concentrated at Friday Harbour and Tanger Outlets, both of which combine recreation, dining, and retail experiences that appeal to destination oriented travellers.

TABLE 4. YEAR OVER YEAR TOTAL VISITS AND VISITS OVER 40 KM VISITS BY LOCATION (2023–2024)

Location	2023 Total Visitors	2024 Total Visitors	Change	2023 40 km +	2024 40 km +	Change
Alcona	10,085,036	9,873,922	-2%	1,515,764	1,810,683	+19%
Tanger Outlets	3,308,545	3,268,037	-1%	1,311,529	1,456,941	+11%
Friday Harbour	723,562	743,985	+3%	312,601	393,963	+26%
Gateway Ca-	276,591	144,535	-48%	88,010	59,381	-33%
Total/Average	14,393,794	14,030,414	-3%	3,240,324	3,723,979	+15%

Source: BP Insights, 2025. Innisfil Tourism Geofence Project 2024. Total Visits and 40km+ Visits

Approximately 73% of all visits originate within 40 kilometres of Innisfil, confirming proximity and convenience as dominant drivers. A further 20% come from the 41-80 kilometre range, largely from within the GTA and Golden Horseshoe, while visitation beyond 80 kilometres represents smaller, yet meaningful, penetration into Ontario's broader travel market (BP Insights, 2025).

FIGURE 6. UNIQUE VISITORS DISTANCE OF TRAVEL TO INNISFIL (2024)

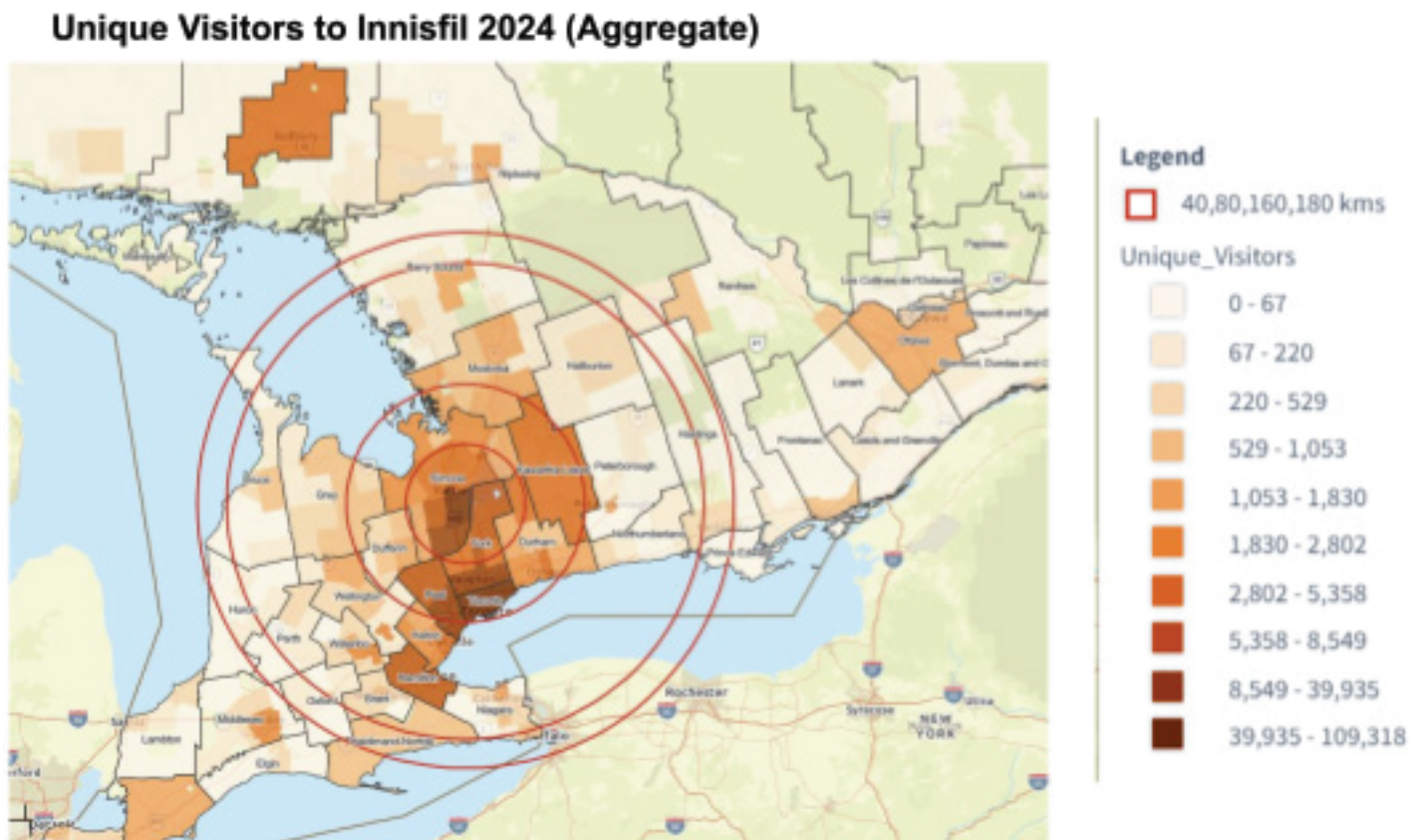


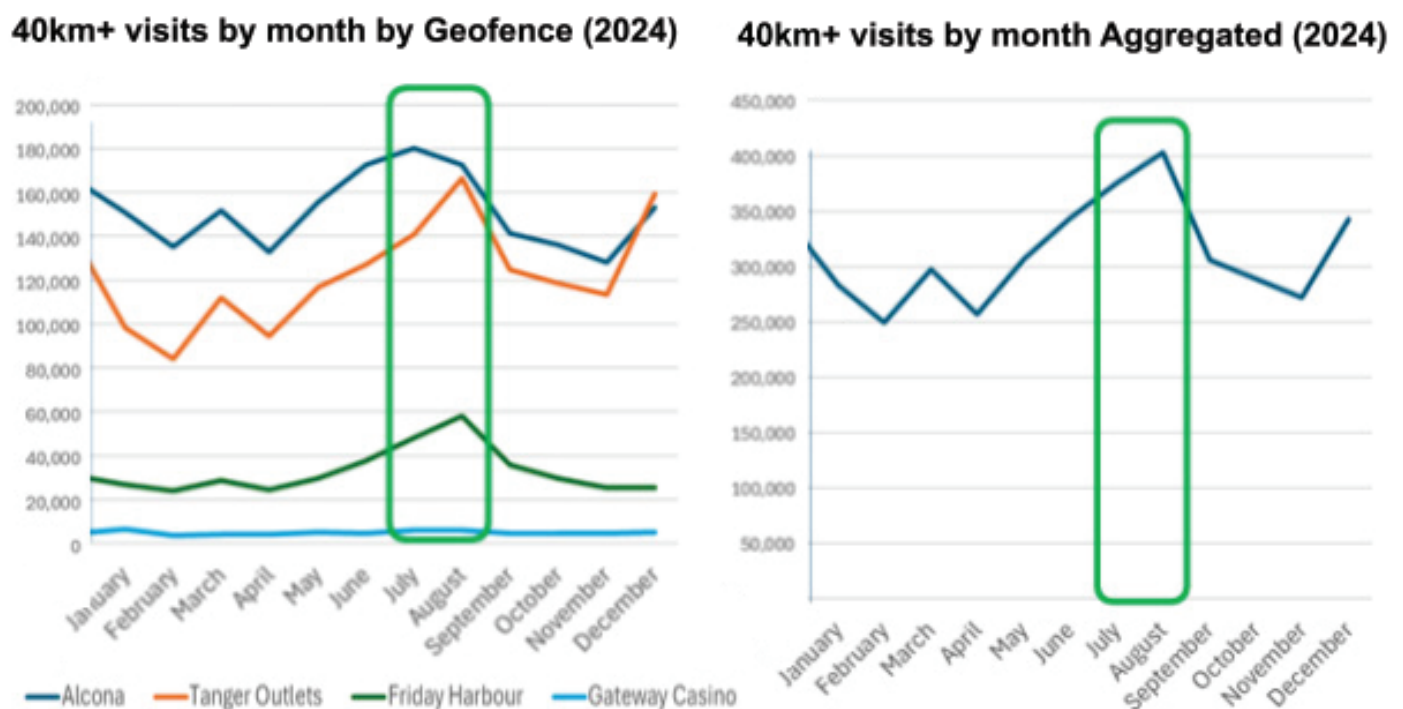
TABLE 5. VISITOR CATCHMENT DISTRIBUTION (2024)

Distance Band	Share of Unique Visitors	Share of Visits
0–40 km	44.6%	73.0%
41–80 km	40.9%	20.1%
81–110 km	4.9%	2.2%
111–160 km	4.5%	2.2%

Source: BP Insights, 2025. Innisfil Tourism Geofence Project 2024 Visitor Numbers.

Seasonality mirrors regional patterns, with visitation peaking between June and August, driven by lake recreation, warm-weather events, and school holidays. With secondary peaks in December and March aligning with other yearly holiday periods. Low shoulder season visitation reinforces opportunities to develop spring and fall experiences that utilize existing assets to avoid peak-season strain.

FIGURE 7. INNISFIL VISITOR NUMBERS COMING FROM 40KM+ (2024)



Source: BP Insights, 2025. Innisfil Tourism Geofence Project 2024. 40+ Visits

Geographically, most visitors originate from York Region, Toronto, and Peel, followed by smaller contributions from Muskoka, Kawartha Lakes, and Parry Sound (BPInsights, 2025). This distribution reflects Innisfil’s dual identity as both a spontaneous day-trip destination and an accessible weekend retreat.

TABLE 6. TOP VISITOR ORIGIN AREAS (2024)

Rank	Origin	Estimated Share of Unique Visitors	Notable Patterns
1	York Region	22%	Proximity and family travel
2	Toronto	20%	Strong day-trip market
3	Peel Region	15%	Group and family visits
4	Simcoe County (outside Innisfil)	12%	Regional leisure and retail trips
5	Muskoka / Kawartha Lakes	6%	Cottage season crossover
6	Other Ontario (80+ km)	5%	Emerging awareness

Source: BP Insights, 2025. Innisfil Tourism Geofence Project 2024. Visitor Origin Areas.

Environics Visitor Segmentation

The Environics PRIZM segmentation profiles offer deeper insights into who is visiting Innisfil and how these groups differ in their demographics, lifestyles, and travel behaviours. The 2004 visitor data identifies seven high-value Target groups over-indexing for visitation to Innisfil compared to the broader 40-150km benchmark market. These groups represent a mix of families, mature couples, young adults, and culturally diverse households, indicating that Innisfil appeals to a broad and varied visitor base (BP Insights, 2025).

TG1: Countryside Families are younger to middle-aged families living in suburban and rural areas with moderate to high household incomes. They are active outdoors and participate in family-oriented recreation, indexing strongly at Gateway Casino and moderately at Tanger Outlets (BP Insights, 2005, p. 38-41).

TG2: Exploring Country Couples include couples and singles, often semi-retired or retired, who favour calm settings, outdoor recreation, and cultural activities. They significantly over-index across nearly all geofenced locations, particularly Gateway Casino (BP Insights 2025 p. 42-45).

TG3: Affluent Established Families are among Innisfil's highest-value visitors. With high incomes and older children, they over-index at nearly every geofenced area except Gateway Casino, showing strong interest in cultural experiences, festivals, and premium dining (BP Insights, 2025 p. 46-49)

TG4: Affluent Suburban Families also represent a core audience. They are digitally engaged and participate in a wide range of recreational activities, over-indexing across all geographies except Gateway Casino (BP Insights, 2025 p. 50-54).

TG5: Mid-Income Visiting Families are older families and couples with practical spending habits, showing consistent engagement with accessible recreation activities and community events (BP Insights, 2025 p. 55-58)

TG6: Younger Lake Simcoe Avids consist of young singles and starter families who under-index overall, but visit slightly more frequently when they do come. Their interests lean toward nightlife and social entertainment (BP Insights, 2025 p. 59-62).

TG7: Urban Diverse Families, the largest segment at 29 % of all visitors, comprise culturally diverse, often multigenerational families primarily from the GTA. They over-index in Alcona and frequently travel for shopping, family visits and general recreational activities (BP Insights, 2025 p. 63-70).

These segments show that Innisfil draws a mix of family groups, mature couples, and young adults, each seeking different types of experiences. High-potential markets include Urban Diverse Families and Affluent Established Families, who combine strong visitation with significant spending power. Across all groups, Innisfil's appeal lies in its geographic accessibility, family-friendliness, cultural inclusivity, and lakeside character.

Local Policy, Planning, and Economic Context

Tourism in Innisfil is poised for steady, intentional growth as the community continues to mature, and invest in amenities that enhance both resident life and visitor appeal. The foundations laid in the 2017 *Tourism Destination Management Plan* remain useful, particularly its call for the Town to take a stronger leadership role, focused experience development, and a more coordinated tourism ecosystem. Since then, the Town's approach to economic development has become more sophisticated, embracing data-driven decision making, improved marketing infrastructure, and stronger partnerships with local businesses (Innisfil EcDev, 2024).

Recent municipal strategies reinforce the role tourism plays in local development. *The Town of Innisfil Economic Development Strategy (2024-2026)*, and the *2024 Annual Activity Report* highlight tourism and culture as drivers of business vitality, local job creation and broader community vibrancy. Innovations such as the Town's CRM system, targeted marketing, and the development of a tourism asset inventory signal a shift toward a more structured and informed approach to managing and promoting the visitor economy (Innisfil EcDev, 2024). The *Innisfil 2030 Strategic Plan* frames tourism as part of a larger effort to cultivate a cohesive, welcoming community with strong amenities, recreational opportunities, and spaces that foster creativity and connection.

As Innisfil grows, so do expectations for what a modern, thriving community should offer. Investments in parks, trails, waterfront spaces, cultural facilities, accommodations, and local businesses contribute to an environment where residents enjoy a high quality of life and visitors naturally follow. The continued evolution of destinations like Friday Harbour, Alcona, Cookstown, and emerging nodes such as the new location for Gateway casino, suggests that Innisfil's tourism ecosystem will only deepen as amenities become more varied and interconnected.

Data Insights and Implications

The data examined throughout this report reveals a community positioned at the threshold of meaningful tourism growth. Innisfil's visitor economy is still emerging, yet the foundations for a more defined and resilient tourism identity are increasingly visible. National and provincial trends show that travellers are seeking experiences that are close to home, easy to plan, meaningful, and connected to place. Regional strategies emphasize sustainability, product innovation, and coordinated destination management. Locally, Innisfil is strengthening the systems, tools, and community assets needed to participate in this evolving landscape.

Across all levels of analysis, three themes consistently surface:

- 1. Growing demand for accessible, place-based experiences**
- 2. Increased reliance on digital systems and high-quality visitor insights**
- 3. Rising expectations for sustainable, community-aligned development**

These themes signal that Innisfil is well positioned to evolve from high volumes of day-trip visitation toward richer, value-oriented visitor experiences.

Visitor mobility data confirms that Innisfil is already a strong draw for short-trip travellers from across the GTA, supported by more than 14 million total visits to its major hubs in 2024. As longer-distance visitation grows, so does the opportunity to shape experiences that encourage extended stays and deeper engagement. The Environics PRIZM segmentation profiles further reveal a diverse set of high-performing visitor groups, including affluent suburban families, culturally diverse urban households, established rural couples, and young adults, each with distinct travel motivations and spending patterns.

Innisfil attracts a wide and balanced mix of visitor markets, creating opportunities to design experiences that appeal across life stages, cultural backgrounds, and interests.

The regional context reinforces this potential. Both RTO7 and Tourism Simcoe County are advancing destination stewardship frameworks that prioritize sustainability, quality of place, operator support, and coordinated experience development. These directions complement Innisfil's emerging strengths, especially those tied to the waterfront, outdoor recreation, culinary and maker-based experiences, and small-scale cultural programming.

Locally, tourism is becoming a more intentional element of Innisfil's economic and community development efforts. The Economic Development Strategy, Annual Activity Report, and Innovate Innisfil 2030 Plan signal growing municipal readiness, supported by investments in CRM systems, improved marketing infrastructure, and a tourism asset inventory. These tools and approaches enable a more coordinated, data-informed, and proactive tourism environment.

Innisfil is building the internal capacity, data systems, marketing tools, and organizational structures that will support a modern and competitive visitor economy.

The town's growth trajectory also brings new expectations for what a thriving community should offer. Investments in parks, trails, waterfront amenities, cultural facilities, accommodations, and local businesses continue to elevate the community experience, with direct benefits for both residents and visitors. As established areas such as Alcona and Cookstown evolve and destinations like Friday Harbour and the new casino mature, Innisfil's tourism ecosystem becomes increasingly interconnected and varied.

Community development and tourism development are working in tandem, strengthening Innisfil's potential to offer year-round, locally grounded experiences.

Taken together, these insights point to a visitor economy with significant room to grow, where the focus is not purely on increasing visitation volume but on shaping value, visitor responsibility, and community benefits. Innisfil's opportunities lie in enhancing experience quality, improving digital discoverability, supporting operator readiness, and emphasizing the qualities that make the community distinct, its lakefront identity, its welcoming and diverse population, and rural character.

This Data and Trends Analysis establishes the foundation for the next phase of further partner engagement that will refine priorities, validate insights, and shape the recommendations that will guide tourism development over the next five years. With a clearer understanding of visitor behaviour, market trends, and municipal readiness, Innisfil is well positioned to build a tourism strategy that is ambitious yet grounded, reflective of community values, and aligned with the needs and expectations of today's travellers.

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Appendix C: Summary of Community Consultations

Prepared by: KLB Consulting
December 2025



What We Heard: Innisfil Tourism Summit

November 19th, 2025

Introduction

As part of the Town of Innisfil's Tourism Summit and Business Showcase on November 19th, 2025, KLB Consulting hosted multiple interactive engagement activities with attendees. These activities were designed to gather meaningful input from the tourism champions in attendance, to ensure that the Innisfil Tourism Strategy and Asset Mapping Project reflects community priorities, local expertise, and Innisfil's unique sense of place.

The session began with a presentation outlining the purpose and process of the Tourism Strategy and Asset Mapping Project, providing participants with context on Innisfil's evolving visitor economy and the role local businesses play in shaping the community's tourism identity. Following the presentation, attendees participated in a full-room group activity where they worked with their table groups to brainstorm a tourism experience rooted in Innisfil's unique Place DNA. This exercise encouraged collaboration, creativity, and future-focused thinking.

Following the formal presentations, participants were invited to engage with our three interactive feedback stations:

Community Asset Mapping: Identifying Innisfil's valued places, people, and stories.

Investment to Impact: Prioritizing where tourism development efforts should focus in the next year.

Two Wishes and a Worry Wall: Sharing ideas that could unlock tourism potential and naming challenges that may hinder progress.

These activities provided rich feedback on Innisfil's strengths, opportunities, and emerging needs within the local tourism ecosystem. This *What We Heard* document summarizes the key themes and feedback shared during these sessions and provides an important foundation for the next phase of strategy development.

**A detailed summary of all engagement will be included in the final report.*

Summary of Key Take Aways

- 1. Innisfil's natural setting and seasonal landscape are central to future tourism development:** Participants repeatedly emphasized Lake Simcoe, the waterfront, trails, seasonal beauty, and outdoor recreation as defining features of Innisfil's identity. This highlights a clear opportunity for the Town to prioritize tourism initiatives that showcase the lake, expand access to nature-based experiences, and support programming that leverages all four seasons.
- 2. Culinary and agritourism experiences are emergin as strong and authentic tourism opportunities:** Food-based storytelling appeared across many of the ideas shared during the experience development activity. Participants referenced farm-to-table-traditions, cottage-style dining, multicultural culinary influences, and the region's agricultural heritage. This signals that visitors may be down to experiences built around local producers, seasonal ingredients, and the unique mix of cultures within the community.
- 3. The community sees festivals, events, and sport tourism as high-impact avenues for increasing visitation:** Investment priorities focused heavily on festivals and events as well as sport tourism capacity. These areas were viewed as the most effective ways to generate momentum, attract new markets, and animate public spaces. This suggests that the Town can strengthen its tourism profile by developing signature events, supporting tournament hosting, and creating reliable yearly anchors for visitation.
- 4. Infrastructure gaps and mobility challenges are limiting visitor readiness:** Participants highlighted barriers related to transportation, accommodation capacity, facility shortages, and access to parks and the waterfront. These gaps affect both residents and visitors and point to the need for improved mobility, expanded lodging options, and additional indoor and outdoor spaces that can support consistent tourism activity. Addressing these issues is essential for enabling longer stays and smoother visitor flow.
- 5. Strong collaboration across businesses, community institutions, and regional partners will be necessary to build successful tourism experiences:** Across all activities, participants consistently identified multiple partners for every concept. Local businesses, cultural groups, farmers, chefs, attractions, the Town, neighbouring municipalities, and regional tourism bodies were all seen as essential collaborators. This reinforces that tourism development in Innisfil will rely on coordinated partnerships, shared storytelling, and joint investment in experience creation.

Engagement Activity Take Aways

Experience Development

The Summit schedule had been filled with tourism champions speaking to the importance of developing new and exciting experiences to bring visitors to Innisfil, and inspiring operators with examples of other businesses that have successfully enhanced their businesses through offering unique experiences. To finish off the day, KLB ran a collaborative activity, where participants worked in groups to brainstorm a tourism experience grounded in Innisfil's unique Place DNA. This activity helped surface creative ideas that reflect local identity and highlight the assets that make Innisfil a meaningful place to visit.

What we Heard as Innisfil's unique, values, spaces, and stories that define the community:

Innisfil's Place DNA		
<ul style="list-style-type: none"> • A retired Demographic • Shopping • Cottage living with facilities of a Big City • Family Friendly • Boating • Safe • Sports Complexes (tournaments/sport tourism) • Generational Families • Good Entertainment • "Front Portch", friendly neighbourhoods • You Know Your Neighbours and there is 'Community Care' • What route 66 is to the USA, highway 11 is to Innisfil 	<ul style="list-style-type: none"> • Lake Access • Agriculture Rich Land & Area • Communities have Unique Personalities • Start of Cottage Country • Farming History • Lake Town • Small Town Vine • Trails/Hiking • Golfing • Casino • Onionfest • Ribfest • Hallmark Movie Small Towns • Canadian Traditions (ice fishing, maple syrup, apples, cornfields, honey) 	<ul style="list-style-type: none"> • Growing Population • Lakeside Hamlet • Fishing All Year Round • Great Farmers Market • Growing Multiculturalism • Waterfront History • Ice Based Events • Growing Young Family Demographic • Small Town Feel • Beautiful Waterfront • Each Season has its own Beauty • Agriculture Fields • Lake Simcoe • Historical Buildings

Within thier table groups, attendees were then asked to use the DNA pieces they identified to create a new experience that would be distinctively Innisfil.

Experiences Developed		
Idea Name (Description of Experience)	Details (Target Market/Resources Needed)	Partners (Businesses and Organizations Involved)
<p>Innisfill Burning Man Festival</p> <ul style="list-style-type: none"> • Everyone brings an item to an open burn in a field during a Full Moon • Open burn or fire pits • Food stations and trucks 	<p>Wealthy Demographic looking for a unique experience</p> <hr/> <p>Farmer donate open land Permits from town for burn Sponsors (realtors, large corps) Radio Stations (marketing)</p>	<p>Bubbly Bites Granolala Always on Board Active XP MVP Ventures Wild Card Brewing Fermoni Group</p>

Winter: Sip and Savour <ul style="list-style-type: none"> • Snowmobile out to Ice Huts on where there's market huts with crafts peoples things (maple syrup, honey, etc) • Brewery and Chef Partnership offering Soup or Stew and drinks • Photo Ops (Art on Huts) 	18+, Couples and/or friend groups	Town of Innisfil RTO7 support Local crafts people Local brewery and chef restaurant
	Marketing support, and creation supprt from the Town	
Brunch Experience Series (You Catch & Cook) <ul style="list-style-type: none"> • Bring your own paddleboard and fishing gear or rentals are available • Guided lesson to lear to fish/ paddleboard • Learn to cook/fry your catch on the shore over fire, or at the Harbour House on the patio 	Outdoorsy, girls trip, couples	Local Cook Equipment Rental Company Harbour House
	Marketing Support	
Lake Destination Tour Tour starts at Tanger Outlets, then a walk through Cookstown, a Marina Experience with a boat tour, pull up for lunch at the Lakefront and finish with a tour of Friday Harbour	Families, Seniors, Day Trippers within 70 to 150km (especially landlocked)	Town of Innisfil Simcoe County Tourism Bus/tour guide Local businesses to provide incentives
	Destination Ontario marketing Advertising support Personal tax credit to spend locally	
Cultural Culinary Experience Where every meal tells a story. Cottage inspired gatherings that celebrate the richness of multicultural traditions while sourcing locally and honouring the simplicity and 'freshness' of farm-to-table living.	Day trip & Overnight travellers	Town of Innisfil Local Vendors Chef/Restaurant
	Marketing support and SEO help Collaboration with influencers Social Media reshares and media blasts	

<p>Tour of Lake Simcoe Communities</p> <ul style="list-style-type: none"> • Honouring the history that there used to be a ferry across Lake Simcoe • Seasonal tour of Lake Simcoe communities by Boat, Snowmobile or Small bus (Inter-regional) • Tour experience connecting Barrie, Orillia, Innisfil, Keswick 	<p>Weekend and Daily visits Different demographics depending on season and method of travel</p>	<p>Simcoe County Tourism Lake Simcoe Communities Private Businesses - retail and restaurants</p>
<p>Summer Fest at the Water</p> <ul style="list-style-type: none"> • Festival on the waterfront that historically used to happen • Family-friendly programming with something for everyone • Local crafts people vendors, brands and entertainment, food and beverage vendors 	<p>Transportation Marketing Support Regional Partnerships with Lake Simcoe Communities Funding Support</p>	
<p>Innisfil Porch Part Modelled after a Newfoundland Kitch Party</p> <ul style="list-style-type: none"> • “Bring a beverage, best stories, and best friend” • Sing-a-Longs with local musicians • BBQ, brownn beans & black bacon • Under the starts, Norther Lights • Creating a real life Hallmark movie vibe 	<p>Children, new families, locals and visitors attracted to the waterfront</p>	<p>Tourism Simcoe Sponsors Town of Innisfil South Simcoe Police, Fire, and Ambulance RTO7</p>
<p>Local vendors, and food/ restaurants Marketing - local radio, paper, social media pages Local student volunteers Entertainment Fundraising campaign for the event</p>	<p>Simplicity Seekers</p> <ul style="list-style-type: none"> • Leave the stress of the city behind • Enjoy traditional activities and small town life <p>• Farm based food (agritourism) • Cookstown BIA • local musicians • Town of Innisfil • Tourism Simcoe County (Product, Producers, Storytellers)</p>	

Experience Development Activity Key Takeaways

1. Innisfil's Lake, Seasons, and Natural Setting are the core drivers of Experience Ideas:

Participants consistently anchored their concepts in Innisfil's defining physical assets such as Lake Simcoe, the waterfront, trails, and the beauty of all four seasons. Whether winter huts on the ice, paddleboard fishing in summer, or interregional lake tours, the lake and seasonal identity were central to nearly every idea. Participants clearly see the lake as Innisfil's defining tourism asset, capable of support both adventure-based and leisure-based experiences.

2. Culinary and Agritourism Experiences are seen as High-Potential, Authentic

Opportunities: Food-based concepts emerged as a major theme, highlighting local farming heritage, small-town gatherings, cottage-style dining, and multicultural storytelling. Culinary and farm-to-table experiences appear as powerful ways to express Innisfil's Place DNA and attract visitors seeking authentic, meaningful activities.

3. Collaboration is Essential as No Experience was Imagined in Isolation:

Every proposed experience identified a network of partners, for example, references to local businesses, chefs, breweries, farmers, cultural groups, Tanger Outlets, Friday Harbour, and regional tourism bodies. This shows an understanding for the need for experiences to develop that embrace cross-sector collaboration and a shared understanding that successful tourism development relies on coordinated community effort.

Two Wishes and a Worry Activity

Participants shared their hopes and challenges for tourism development by contributing to the "Two Wishes and a Worry" activity. On sticky notes, they wrote two ideas or "wishes" that would help their business or community grow, along with one "worry" that might hold that progress back.

Wishes		
<ul style="list-style-type: none"> • Tourism Kiosk at Tanger Outlets to share what's available in the Region • Transportation • YMCA expansion • Less property tax • Lease to Own Model on Business Properties (Government Subsidized) • Shelter support • Jobs • World Cup Activation • Affordable Commercial Space Rentals • Persian Restaurant • Outdoor Pickleball courts • Shared spaces for activities & vendors 	<ul style="list-style-type: none"> • Multi-cultural sport events • Multi-sport events • Diverse business opportunities rather than multiples of one industry • Pickleball courts outside and indoor • Signage directing people to businesses • Mental health supports • Multi-sport event centre • Indoor turf field • Indoor playground • Catholic high school • Innisfil Farmers Market Expansion to Indoor in off season 	<ul style="list-style-type: none"> • Zoning open "Ag" to more uses • Access to lakeside parks for local people • One stop family oriented destinations • Controlled foreign investment • Transparency in Granting Processes from upper levels of government • More vegan restaurant options • Local affordable experiences

Worries		
<ul style="list-style-type: none"> • Lack of Lake & Park Space for Locals • Rising property taxes • Land scarcity: Land available for infrastructure, city-investment, mixed commercial use 	<ul style="list-style-type: none"> • Chain businesses pushing out locally owned businesses • Lack of jobs to maintain growing population • That Innisfil won't support Lefroy business through construction • Infrastructure gaps 	<ul style="list-style-type: none"> • Road closures • Constructions and restrictions • Car noise limit • Racism • Cookstown keeping its groceries and banks • No off road vehicles on trails and roads

Two Wishes and a Worry Activity Key Takeaways

1. Infrastructure gaps limit the community's capacity to support year-round tourism:

Wishing for multi-sport facilities, indoor recreation spaces, expanded YMCA services, playgrounds, and shared activity spaces signal a desire for amenities that serve residents and enhance tourism appeal. These gaps suggest Innisfil currently lacks the indoor, shoulder-season, and family-focused infrastructure needed to support more consistent visitor activity throughout the year. Tourism growth will require investment in community amenities that double as tourism assets.

2. Business diversity and affordability are critical to strengthening Innisfil's visitor economy:

Participants expressed strong interest in more diverse dining options, multicultural businesses, affordable commercial spaces, clearer zoning flexibility, and protections for local operators. This points to a key tourism implication: visitors want variety and authenticity, and Innisfil must support an environment where unique, locally owned businesses can thrive. Without affordable space and a supportive business ecosystem, the town risks losing exactly the types of businesses that give destinations character and draw visitors.

3. Access, Mobility, and Wayfinding Are Barriers to Tourism Growth:

Requests for improved transportation, a tourism kiosk at Tanger Outlets, clearer signage directing people to businesses, and concerns about road closures and construction all highlight challenges in how visitors move through and experience Innisfil. Tourism development will depend on improving navigation, strengthening gateway points, and ensuring that visitors can easily find local experiences. In its current state, limited access to parks, the waterfront, and local businesses may restrict both visitor circulation and spending.

Investment to Impact Activity

At this station, participants were asked to think like investors in Innisfil's tourism future. Each person received five "investment" dots to allocate to the areas they believed should be top priorities over the next year, such as marketing, workforce development, downtown activation, or experience creation. Some spread their dots across multiple priorities, while others focused all their support on one. This exercise revealed where participants saw the greatest potential for short-term impact and collaboration.

Topic	#
Festivals and Events	24
Public Transportation	18
Workforce & Training	12
Downtown Activities	12
Parks	8
Youth	5

Topic	#
Short Tourism Capacity	21
Accommodation Capacity	17
Experience Development	12
Small Business without a retail location	10
Marketing & Storytelling	7
Entertainment (Casino)	1

Investment to Impact Key Takeaways

- 1. Festivals, Events, and Sport Tourism Are Seen as the Fastest Path to Growing Visitation:** The highest “investment” priorities were **Festivals & Events (24 dots)** and **Sport Tourism Capacity (21 dots)**. This signals strong beliefs that creating and supporting signature events, along with strengthening Innisfil’s ability to host tournaments and sports gatherings will produce immediate tourism impact. For strategy development, this suggests the community is eager for activation that brings people together, drives overnight stays, and animates public spaces across seasons.
- 2. Transportation and Accommodation Gaps Are Limiting Tourism Growth:** Participants allocated significant priority to **Public Transportation (18 dots)** and **Accommodation Capacity (17 dots)**. These choices reflect a clear understanding of the barriers visitors currently face, they are having difficulty moving between destinations and finding places to stay. For Innisfil to grow as a destination, improvements in mobility and lodging will be essential to supporting longer visits and more dispersed economic activity.
- 3. Experience Development, Downtown Activation, and Workforce Readiness Are Critical Building Blocks:** Clustered mid-range priorities (**Experience Development (12 dots)**, **Downtown Activation (12 dots)**, and **Workforce & Training (12 dots)**) suggest that while events may drive quick wins, the community recognizes the need to strengthen the foundational elements of tourism. This includes creating more market-ready experiences, ensuring vibrant and welcoming commercial districts, and supporting a skilled workforce capable of delivering high-quality service. These topics indicate that long-term tourism growth relies on building strong local capacity and enhancing the day-to-day visitor experience.

Asset Mapping Activity

Participants gathered around large community maps to identify the places, people, and stories that make Innisfil unique. Using sticky notes, they were invited to mark parks, landmarks, local businesses, and cultural sites that they felt were key community assets. We were hoping for more engagement with this activity, as we feel there are numerous other assets and major attractions, such as Tanger Outlets and many lakeside dining options, that weren't identified during this activity.

Assets Mapped	
<ul style="list-style-type: none"> • Gliford Haunted Mansion & Active XP (during May-October) • Shore Acres Drive Boat Launch • Friday Harbour • Del Zotto Butchers (Meat Shop) • Trans Canada Trail • Gateway Casino 	<ul style="list-style-type: none"> • Innisfil Arboretum • Innisfil Library & Town Hall Community Events • YMCA • Innisfil Farmers Market • Cooks Bay Marina

Other Notes:

- Cooks Bay Marina is planning a future expansion
- Gateway Casino marked current location, and site of the new location

Asset Mapping Key Takeaways

- 1. Limited Engagement with the Activity Resulted in an Underrepresentation of Key Tourism Assets:** Participants mapped only a small number of community assets, and several major attractions, such as Tanger Outlets and other well-known visitor attractions, were not identified during the exercise. This appears to be more reflective of low engagement with the activity station rather than a lack of recognition of these assets within the community. While increasing local awareness of the full tourism ecosystem may still offer value, the primary takeaway was this may not have been the right activity for this space/event. Having maps overlapping each other on the table made it confusing and limited engagement with the activity. Further assets will be pulled out during continued engagements and research by our team.
- 2. Outdoor Recreation and Waterfront Spaces Stand Out as Core Community Anchors:** Most of the assets identified such as Cooks Bay Marina, the Innisfil Farmers Market, Trans Canada Trail, Shore Acres Drive Boat Launch, and the Innisfil Arboretum, highlight a strong reliance on outdoor and nature-based amenities. This reinforces that Innisfil's tourism identity is closely tied to its landscape and waterfront, making stewardship, access, and infrastructure around these spaces crucial for tourism growth. Planned expansions at sites like Cooks Bay Marina further indicate opportunities for enhanced tourism offerings around this theme.
- 3. Community Hubs and Local Institutions Play an Important Role in Visitor Experiences:** Assets such as the YMCA, libraries, farmers market, and Town Hall were mapped alongside tourism-oriented businesses. This shows that tourism in Innisfil is not limited to traditional attractions; community institutions also serve as key touchpoints where residents and visitors intersect. Strengthening programming, partnerships, and activation at these community hubs could support more inclusive, year-round tourism experiences and deepen local engagement.

Next Steps

As the project moves forward, KLB Consulting will continue to honour the perspectives shared through this engagement process. Feedback from the Innisfil Tourism Summit and Business Showcase will directly shape the Tourism Strategy and Asset Mapping Project by guiding strategic options and ensuring recommendations align with the community's realities, aspirations, and assets. Community priorities will be revisited at key decision points so the final strategy reflects local values and supports tourism development that benefits residents, businesses, and visitors. The ongoing involvement from tourism community partners will remain essential as Innisfil advances toward a sustainable and distinctly place-based tourism future.

Questions and Feedback

If you are part of the Town of Innisfil tourism community and have comments or concerns about how your input is reflected in this summary, please contact:

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KLB Consulting
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We'd be happy to hear from you to better understand your perspectives.

What We Heard: One-on-One Interviews

Tourism operators, industry partners, and municipal staff
Engagement period: December 2025 - February 2026

Introduction

As part of the Town of Innisfil's Tourism Strategy and Tourism Asset Mapping project, the project team conducted 12 one-on-one and small-group interviews with a total of 25 participants including tourism operators, industry partners, regional organizations, education and workforce partners, and municipal staff. These conversations were intended to understand on-the-ground realities, identify strengths and gaps in Innisfil's visitor economy, and surface practical actions that can be advanced over the next five years.

This summary highlights the key themes and feedback we heard. A more detailed record of engagement inputs is maintained within the project files and will inform the final strategy recommendations and implementation plan.

Main Points

Define Innisfil's destination identity and 'product' before scaling promotion

- Multiple partners emphasized a mismatch between marketing and the current depth of visitor-ready experiences, noting that clarity is needed on what Innisfil is (and is not) trying to be as a destination.
- Water is the consistent anchor for destination identity, with an emphasis on South Lake Simcoe positioning supported by complementary strengths such as waterfront dining, outdoor recreation, and seasonal experiences.
- Participants encouraged focusing on niche and 'micro-tourism' growth that is authentic and manageable, rather than pursuing high-volume tourism.
- A recurring opportunity is to build itineraries and packaged experiences that help visitors move beyond Highway 400 nodes and into Innisfil communities and experiences.

Stewardship and visitor management at the waterfront are foundational

- Lake Simcoe and Innisfil Beach Park were consistently identified as the primary draws, but also the locations experiencing the greatest capacity pressures.
- Parking constraints and access policies were raised repeatedly as limiting factors for visitor experience and for the feasibility of tourism growth.

- It was identified that a need to balance event programming with day-to-day resident quality of life was crucial, with mention of constraints on hosting events during peak summer periods due to overcapacity.
- Participants pointed to the importance of clear visitor expectations, operational readiness, and coordinated approaches across departments and partners.

Infrastructure gaps are limiting the economic capture of tourism activity

- A shortage of accommodations was one of the most consistent barriers raised, affecting sport tourism, events, and overnight visitation potential.
- Transportation and connectivity between key nodes (e.g., waterfront, Friday Harbour, outlets, future casino) were identified as critical gaps for both visitors and workers.
- Parking was described as a system-wide constraint across event-capable spaces and waterfront locations.
- Stakeholders noted that without these enabling conditions, visitor spending 'leaks' to nearby communities (e.g., for hotels and dining), limiting local economic benefits.

Make it easier to discover and navigate Innisfil through collaboration, wayfinding, and tools:

- Interviewees emphasized 'co-opetition' through strengthening collaboration among operators to create shared offers, cross-promotion, and aligned service standards.
- Wayfinding and signage were identified as high-impact priorities, including improved highway visibility and consistent visitor-facing information at key high-traffic locations.
- Several participants suggested digital supports such as interactive kiosks, itinerary-building tools, and multilingual visitor information to simplify decision-making.
- Participants also highlighted the need for a central, up-to-date repository of experiences and events to support visitor planning and partner promotion.

Strong experience themes emerged that can be strengthened through packaging and quality improvements:

- Waterfront dining was identified as a distinctive strength with strong market appeal when paired with regional promotion.
- Ice fishing was described as a signature winter strength with potential to attract packaged visitors from outside the region.
- Trail, cycling, and golf assets were identified as scalable 'add-on' experiences that can extend stays when bundled with dining and waterfront experiences.
- Agritourism and maker tourism were repeatedly cited as high-fit opportunities, including farm-gate experiences, orchards, honey and sunflower farms, and small-scale workshops.
- Partners encouraged focusing on experience readiness, training, and service culture so that growth is matched by quality.

Workforce and talent development is a cross-industry issue:

- Education partners described significant pressures on tourism and hospitality training, including reduced enrolment and uncertainty related to broader policy conditions.
- At the same time, partners emphasized that youth pathways (high school programs through to post-secondary and local employment) remain a strong opportunity to strengthen local workforce supply.
- Stakeholders identified opportunities for practical micro-credentials and operator training, including cultural intelligence, equity and inclusion, and Indigenous relations.
- Transportation barriers were also raised as a key contributor to workforce attraction and retention challenges across retail and tourism nodes.

Municipal process clarity and internal capacity matter for enabling tourism growth:

- Several partners identified permitting and approvals as a barrier to quick, small-scale experiential development (e.g., seasonal pop-ups, carts, food trucks), suggesting a need for clearer pathways and improved responsiveness.
- Municipal staff highlighted the value of defining tourism roles across departments to reduce duplication and strengthen coordination.
- Governance tools such as a tourism network (with clear terms of reference) were identified as helpful for ongoing collaboration and shared implementation.
- Policy and revenue tools, including Municipal Accommodation Tax (MAT) considerations and alignment with short-term rental approaches, were identified as linked to destination stewardship and infrastructure investment needs.

Major anchors and regional partners are ready to collaborate, but alignment is needed:

- Major tourism and commercial anchors expressed interest in being clearly embedded in a broader tourism ecosystem and in developing complementary packages with other local assets.
- Regional partners emphasized that the first priority is to define Innisfil's destination DNA, then layer experiences and support operators to package and collaborate before scaling marketing.
- Partners identified regional tools and platforms that could support Innisfil listings, itineraries, and experience-development programming, including workshop delivery and business supports.

Next Steps

- Use these engagement themes to refine the Strategy's destination positioning, prioritizing a clear 'water-first' identity and a manageable approach to growth.
- Advance a short-list of enabling infrastructure priorities (parking, accommodations, transportation connections, wayfinding) that unlock stronger local economic capture.
- Translate experience themes into a practical experience development program (packaging, itineraries, service standards, training, and collaborative offers).
- Strengthen governance and implementation readiness through a defined tourism network and clear municipal roles for coordination.
- Align next steps with regional partners and existing tools (business listings, itinerary builders, workshops, and sector supports) to accelerate implementation.

Questions and Feedback

If you are part of the Town of Innisfil tourism community and have comments or concerns about how your input is reflected in this summary, please contact:

Tristin Vogel
Economic Development and Tourism Officer
KLB Consulting
tristin@klbconsultants.ca

We'd be happy to hear from you to better understand your perspectives.

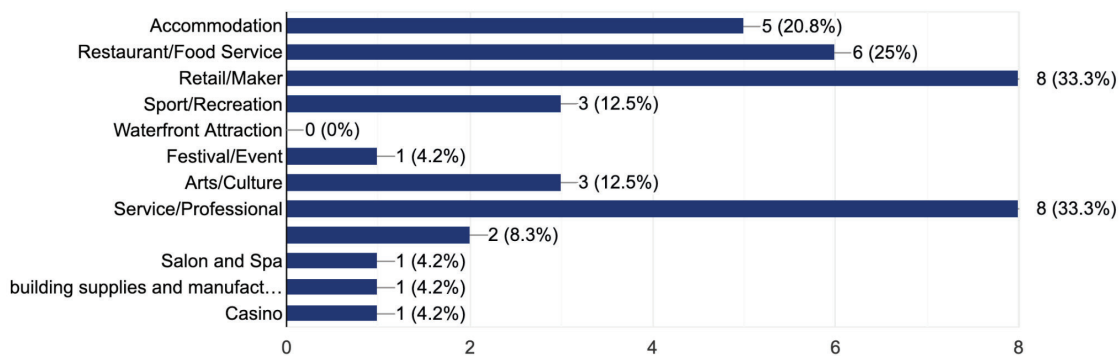
What We Heard: Business Survey Responses

Introduction

As part of the Town of Innisfil's Tourism Strategy and Tourism Asset Mapping project, the Town gathered input from local businesses through a business survey. The survey sought to understand how businesses experience tourism today, what they see as Innisfil's key strengths and differentiators, where assets are under-recognized, and what barriers, risks, and supports matter most for tourism-related business growth. A total of 25 responses were collected between November 2025 and February 2026. This document highlights the key themes and feedback we heard. A detailed summary of engagement inputs will be reflected in the final Tourism Strategy and Implementation Plan.

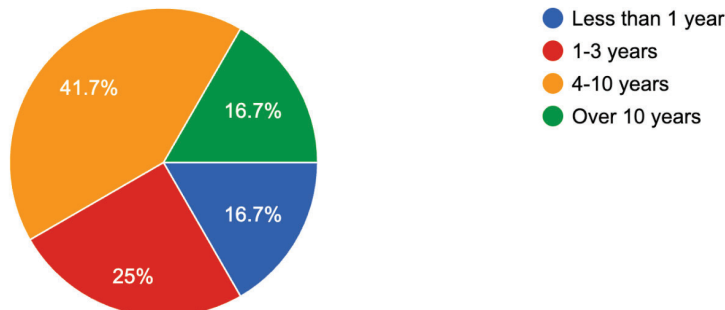
What type of business do you operate?

24 responses



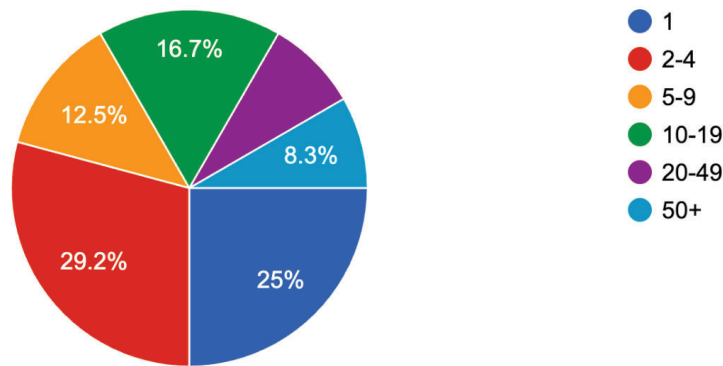
How long have you operated in Innisfil?

24 responses



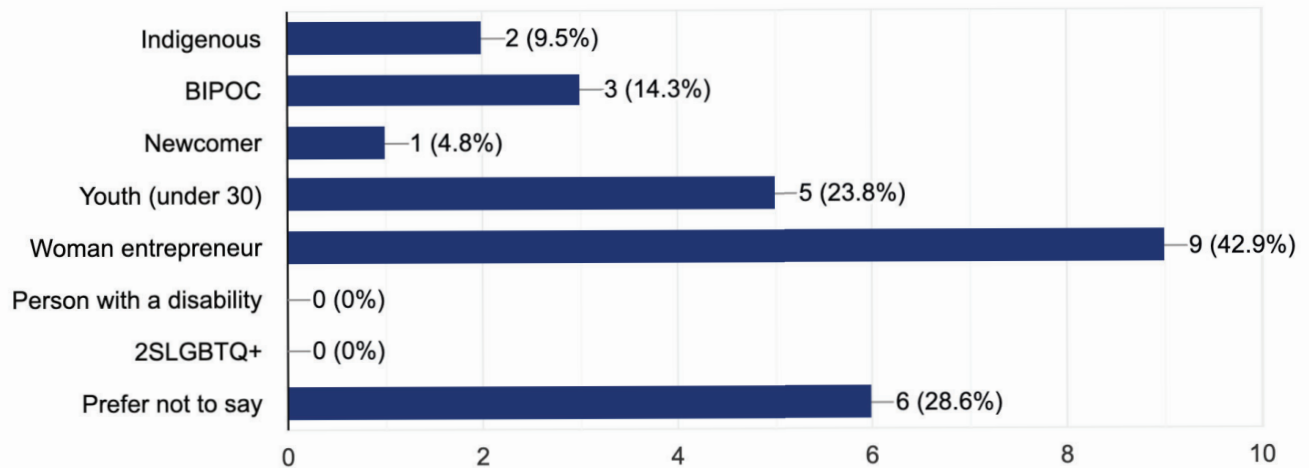
How many people are currently employed in your business (including owners)?

24 responses



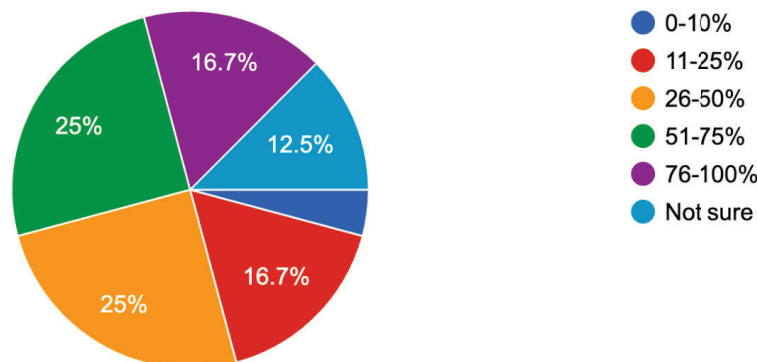
Do you identify as any of the following?

21 responses



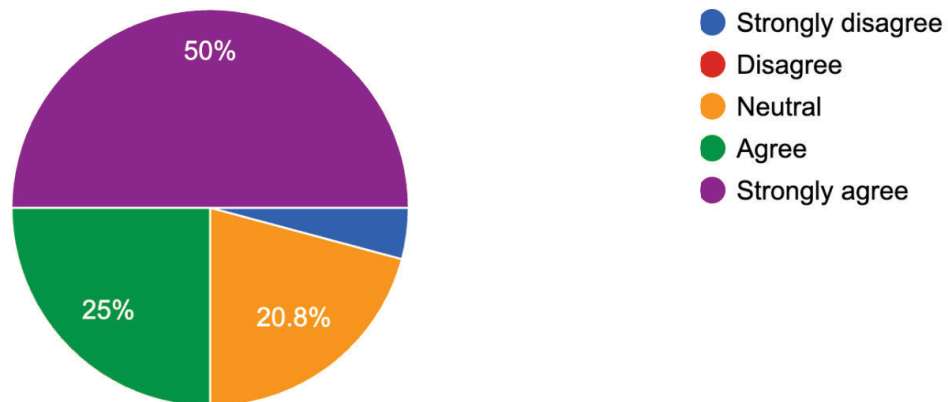
What percentage of your customers do you estimate are tourists (visitors coming from over 40km)?

24 responses



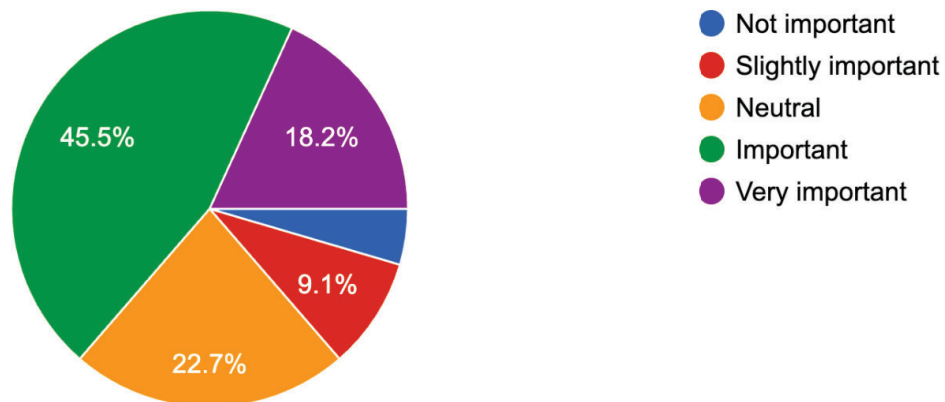
My business benefits from visitors and tourism traffic.

24 responses



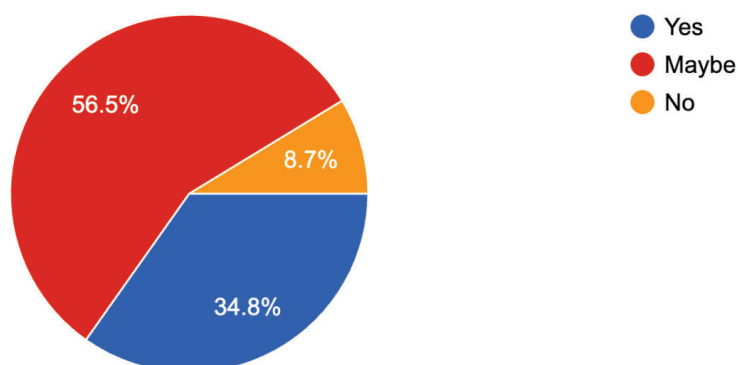
How important is environmental sustainability to your operations?

22 responses



Would you be interested in programs or recognition related to sustainable tourism practices?

23 responses



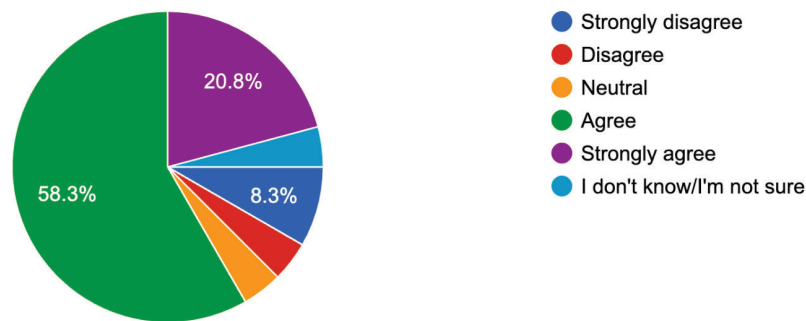
Main Points

Water, access, and established anchors define Innisfil's strongest tourism appeal

- Businesses most frequently identified the Lake Simcoe waterfront, beaches, and lake access as Innisfil's primary tourism strengths.
- Friday Harbour was repeatedly cited as a major anchor and a key draw within the destination.
- Proximity to Toronto and the Greater Toronto Area (including Highway 400 access) was consistently described as a competitive advantage that positions Innisfil as an easy getaway.
- Nature-based and outdoor activities (trails, parks, boating, fishing, and quiet/serenity) were commonly identified as complementary strengths, alongside other draws such as Cookstown, farms, gold, venues, and recreation assets.

Innisfil has strong tourism assets (e.g., beaches, trails, local culture).

24 responses



Businesses see Innisfil as a 'close-to-the-city' waterfront community with a distinct mix of rural character and amenities

- Respondents most often described Innisfil's proximity to urban markets as a key differentiator compared with other rural waterfront destinations.
- Friday Harbour was described as a unique asset that adds a 'built' destination experience alongside a rustic or small-town feel.
- Businesses noted that Innisfil combines waterfront/nature with a welcoming community atmosphere that is perceived as clean, safe, and inviting.
- Some respondents pointed to affordability and the availability of varied amenities as features that can support repeat visitation and longer stays.

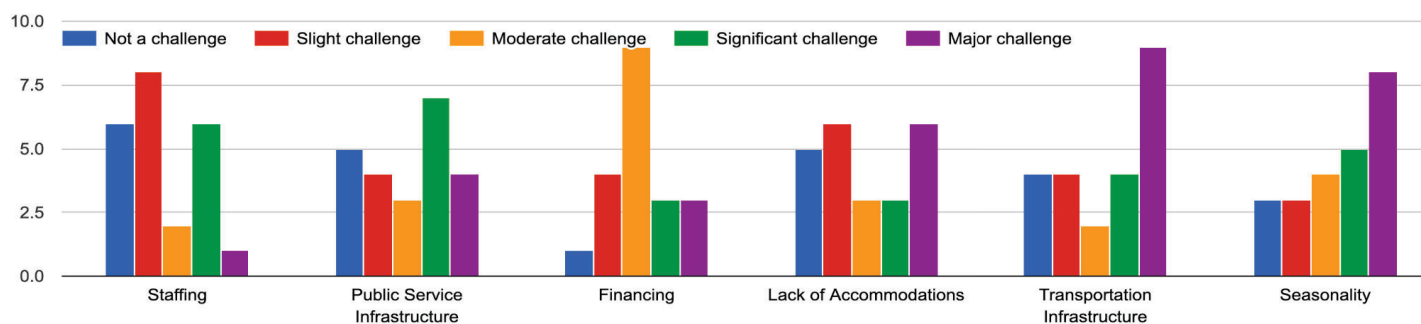
Several local assets are viewed as under-recognized or under-promoted

- Businesses identified smaller beaches, local parks, walking/cycling trails, and lakefront features as assets that could be better profiled and packaged.
- Friday Harbour's nature preserve and trail system were cited as under-promoted, alongside a broader need to emphasize 'all things lakefront' beyond one signature park.
- Respondents noted that farming culture, fresh local produce, and potential farm-gate experiences are not as visible as they could be.
- Some respondents highlighted cultural and community visibility gaps, including an interest in better reflecting and celebrating the community's diversity through tourism storytelling and programming.

The strongest opportunities focus on year-round experiences, better infrastructure, and a stronger 'place' offering

- Businesses repeatedly called for expanded year-round activity, especially winter experiences, along with more seasonal festivals, events, and family-friendly programming.
- Infrastructure and access were emphasized, including additional and/or expanded beach access, parking availability, improved bike lanes, and better transit connections (including GO-related access and improved connections to Friday Harbour).
- Respondents suggested strengthening the visitor experience through more walkable food and beverage options, coffee/ice cream, and 'things to do' near key nodes (particularly the waterfront).
- There was a consistent message to improve branding and promotion of what already exists, including targeted marketing for areas such as Cookstown and clearer destination narrative storytelling.
- Experience concepts suggested included a food trail, local maker/crafter trail, container market, enhanced waterfront development and streetscape improvements, and additional rentals and water-based activities.

How challenging are the following factors for tourism businesses in Innisfil?

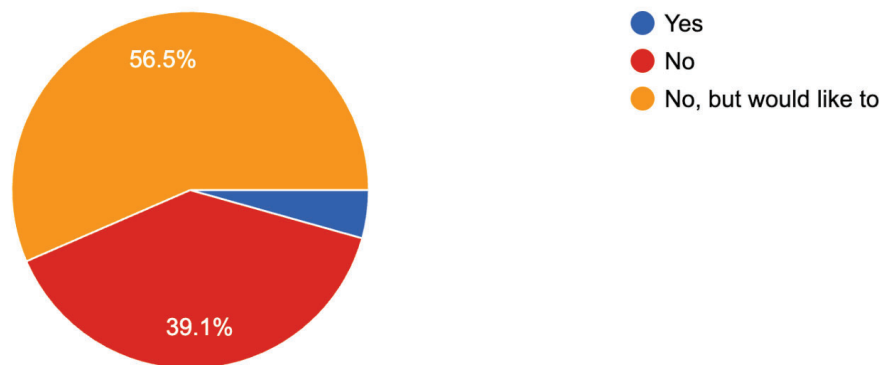


Barriers to business growth include affordability, infrastructure constraints, seasonality, and limited visibility

- Affordability and access to suitable commercial space were cited as barriers, particularly for small and growing businesses.
- Infrastructure limitations (including water/sewer capacity in Cookstown), road disruptions, transportation challenges, and lighting were identified as constraints.
- Marketing and awareness gaps were frequently raised, included promotion for small business and low visitor awareness of available attractions and experiences.
- Businesses also referenced seasonal demand patterns, staffing shortages, rising operating costs, and regulatory complexity as limiting factors.

Do you currently market your business as part of a tourism network or association (e.g., Town of Innisfil EcDev, RTO7, Tourism Simcoe County)?

23 responses

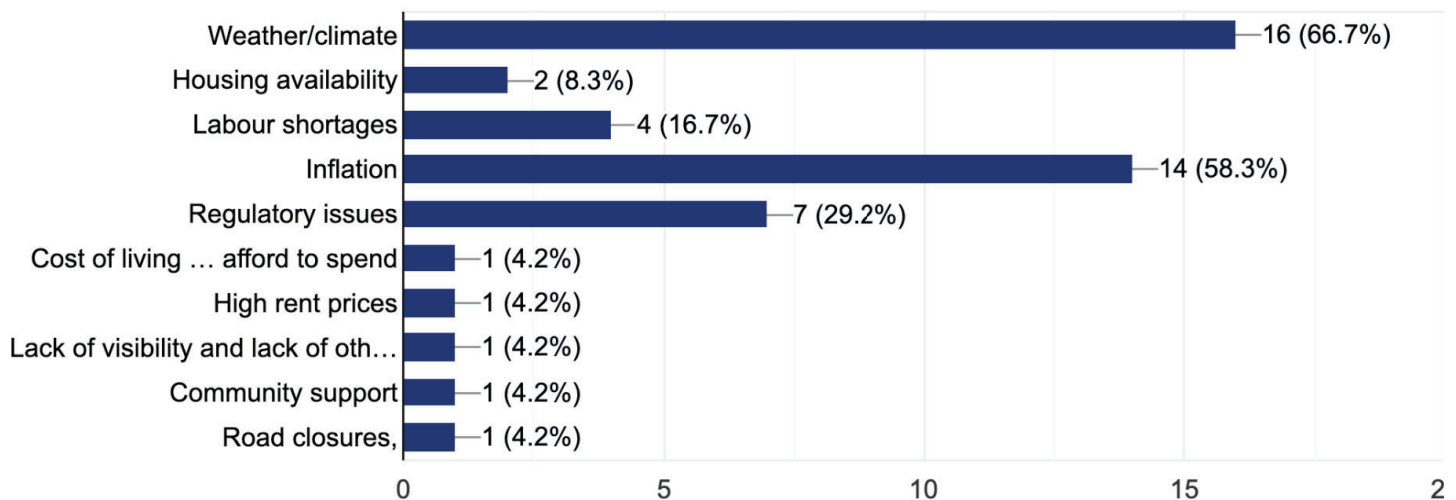


Long-term risks centre on economic uncertainty, inconsistent visitation, and development pressures

- Respondents identified economic conditions, rising costs, and tax pressures as significant concerns.
- A lack of consistent visitor traffic across all seasons and overreliance on summer demand were noted as ongoing threats.
- Construction disruption, development pressures (including concerns about overbuilding), and the long-term viability of Cookstown were raised.
- Workforce availability, changing visitor expectations, and challenges sustaining brick-and-mortar retail were also identified as risks.

What external factors most affect your business stability?

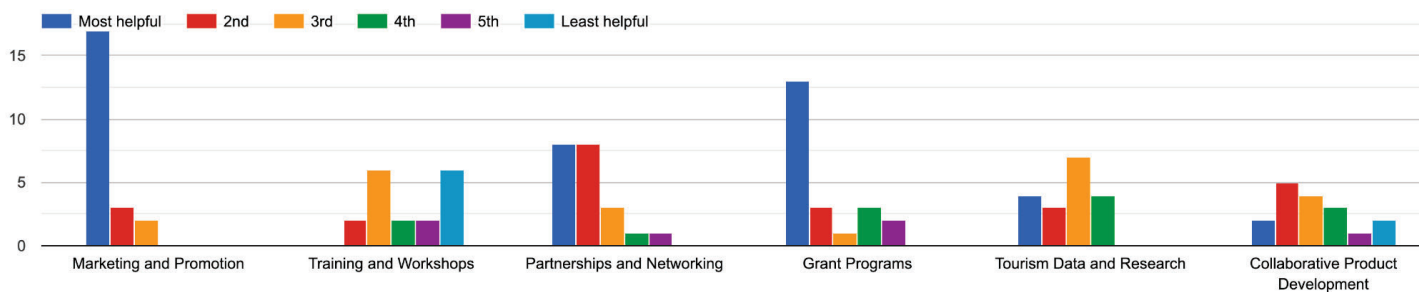
24 responses



Businesses want practical supports: marketing, funding, coordination, and 'make it easier' tools

- Marketing and promotion supports were requested, including stronger advertising for local businesses and improved off-season marketing.
- Businesses identified a need for better communication and coordination, including a shared and timely calendar of events.
- Funding supports for arts, culture, and creative placemaking were raised as important to building a stronger sense of place and year-round visitor appeal.
- Logistical supports were suggested, including transportation improvements (e.g., shuttles from GO) and facilities development support.
- Businesses expressed interest in collaboration opportunities, including hosting events and building shared offers that increase exposure.

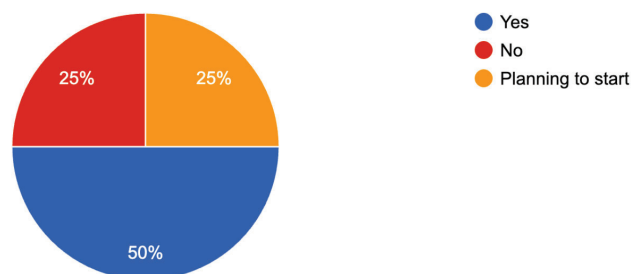
What support or resources would help you strengthen your tourism offering?



Business data collection is limited and inconsistent, with opportunities to strengthen shared insights

- Some businesses collect basic customer contact information (e.g., names, emails, phone numbers) and feedback such as how customers heard about them.
- A small number noted platform-based data collection (e.g., Airbnb) or compliant website/user data.
- At least one responded indicated collecting minimal information primarily for tax purposes.
- These patterns suggest an opportunity to strengthen shared measurement practices over time (e.g, common visitor questions, referral sources, seasonal patterns) to support more targeted marketing and experience development.

Are you currently collecting data on your customers (emails, postal codes, feedback, etc.)
24 responses



Next Steps

- Use the business survey themes to refine destination positioning, prioritizing waterfront and accessibility as core strengths, supported by a clear destination narrative.
- Identify a practical package of enabling actions that respond to business-identified constraints (parking/access, trails/cycling connections, transit links, and placemaking near key nodes).
- Develop a year-round experience development and events approach that supports seasonal balance and increases local economic capture.
- Strengthen business visibility through improved coordination tools (central calendar, consistent listings, and cross-promotion mechanisms) and targeted marketing supports for small businesses.
- Explore feasible supports for businesses, including funding/partnership opportunities for arts and culture, collaborative programming, and workforce-related supports.

Questions and Feedback

If you are part of the Town of Innisfil tourism community and have comments or concerns about how your input is reflected in this summary, please contact:

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We'd be happy to hear from you to better understand your perspectives.

What We Heard: Public Survey

Introduction

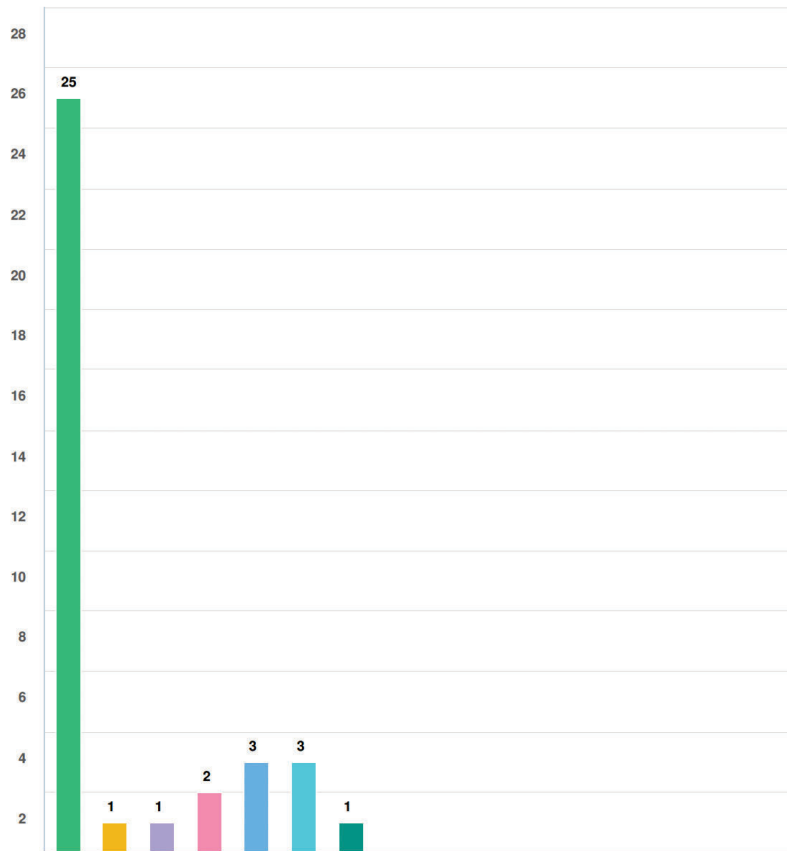
As part of the development of the Town of Innisfil's Tourism Strategy, the Town invited residents to share their perspectives through an online public survey. The survey gathered feedback on Innisfil's tourism strengths, opportunities to improve the visitor and resident experience, and how tourism growth should be managed. A total of 36 responses were collected between January, 2026 and February, 2026. Findings below summarize the key themes and patterns across both multiple-choice and open-ended responses.

Survey Snapshot

- Residency: Most respondents have lived in Innisfil for 1–5 years (18 of 36), followed by more than 10 years (11 of 36).
- Tourism employment: 33 of 36 respondents indicated no one in their household works in a tourism-related business.
- Local participation: 17 of 36 respondents visit local restaurants, attractions, or events frequently (a few times or more a month).
- Hosting visitors: Most households host visiting friends/relatives several times per year (9 reported 3–5 visits/year; 9 reported 6–10; 10 reported 10+).
- Overall stance: Views on the Town investing in tourism were mixed but leaned supportive (35 responses total).
- Top management priorities as tourism grows: environmental protection (28 selections) and traffic/parking (26 selections).



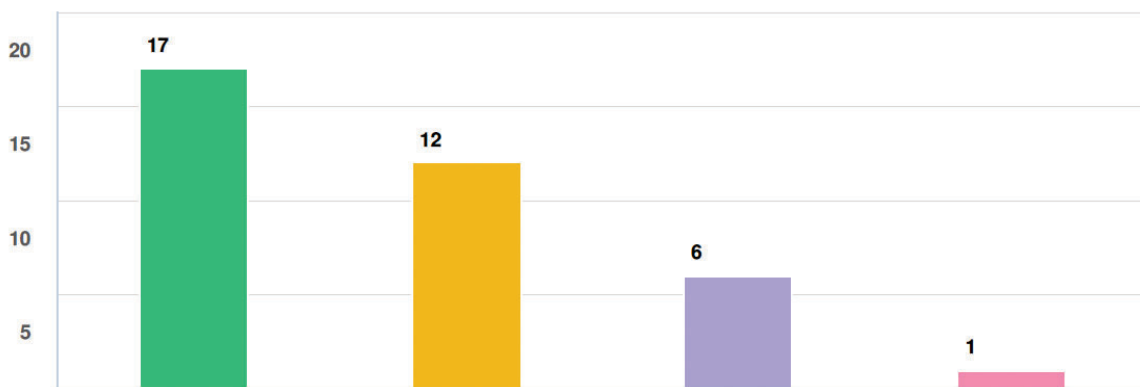
Q2 What area or community of Innisfil do you live in?



Question options

- Alcona
- Belle Ewart
- Big Bay Point
- Gilford
- Lefroy
- Sandy Cove
- Stroud
- Other (please specify)
- Barclay
- Churchill
- Cookstown
- Fennell's Corners
- Innisfil Heights
- Agricultural/Rural
- I live outside of Innisfil
- Prefer not to answer

Q4 How often do you personally visit local restaurants, attractions, or events in Innisfil?

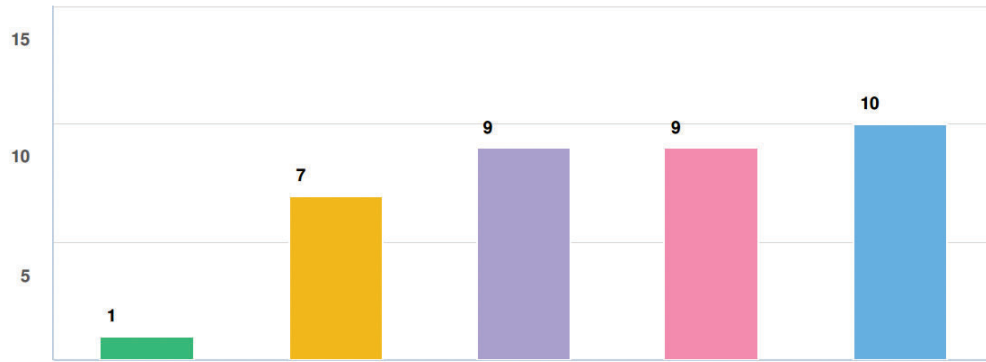


Question options

- Frequently (a few times or more a month)
- Occasionally (once every couple of months)
- Rarely (once or twice a year);
- Never

Optional question (36 response(s), 0 skipped)
Question type: Checkbox Question

Q5 How often does your household host visiting friends or relatives from out of town?



Question options

- Never
- 1-2 times a year
- 3-5 times a year
- 6-10 times a year
- +10 times a year

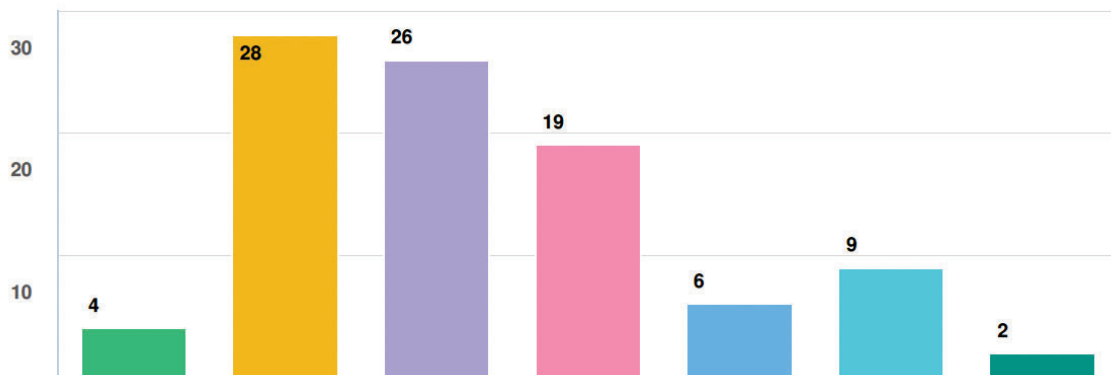
*Optional question (36 response(s), 0 skipped)
Question type: Checkbox Question*

Main Points

The waterfront is Innisfil's anchor, but residents want it protected and better managed

Residents consistently identified Lake Simcoe, Innisfil Beach Park, and the broader waterfront as the community's strongest tourism draw. At the same time, many respondents raised concerns about overcrowding, litter and beach cleanliness, parking constraints, and the day-to-day impacts of peak-season visitation. This reinforces a clear message that the waterfront is central to Innisfil's tourism identity, and stewardship, operations, and visitor management need to be treated as core tourism infrastructure.

Q15 Which issues do you think are most important to manage as tourism grows? (Select up to three priorities)

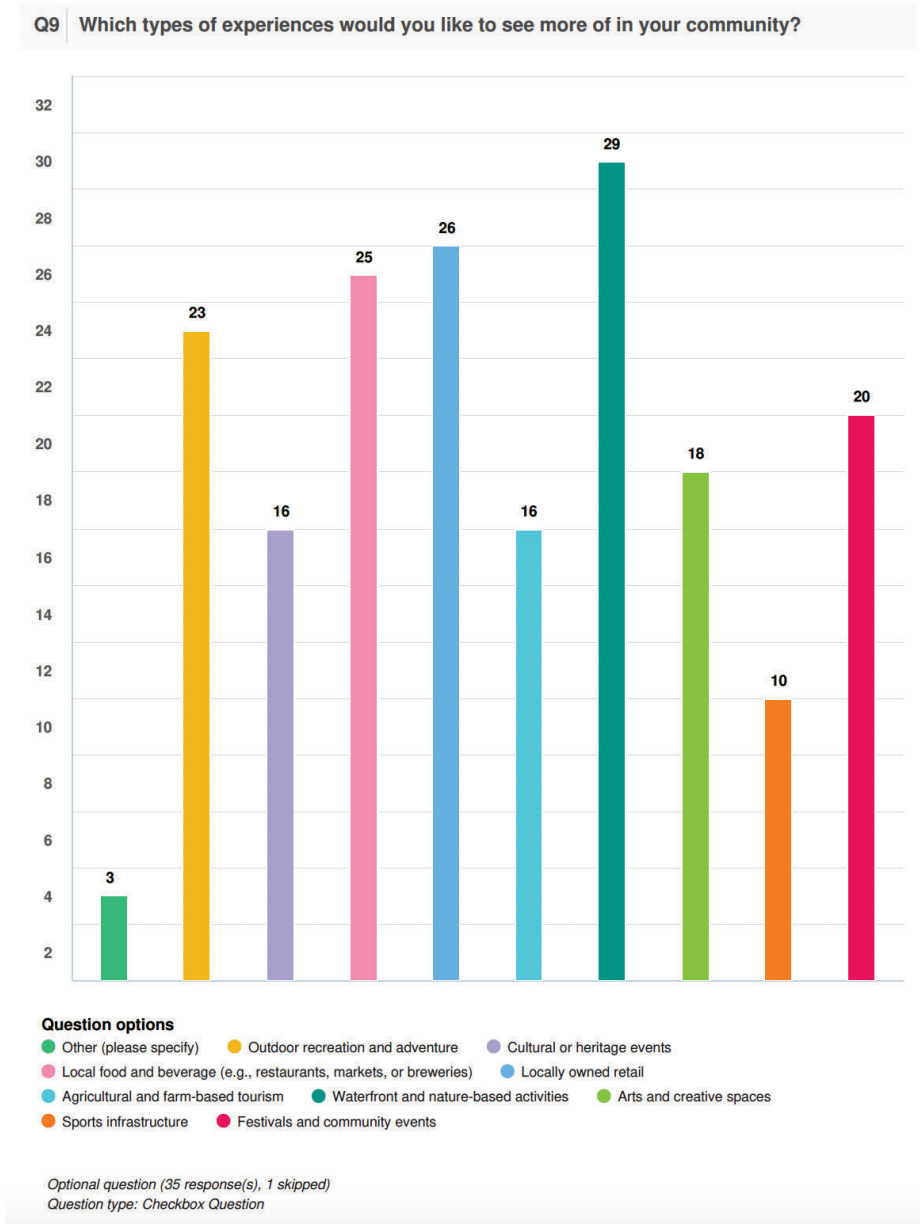


Question options

- Other (please specify)
- Environmental protection (e.g., beaches, lake health, etc.)
- Traffic and parking
- Noise and crowding
- Affordable housing
- Waste management
- Local business competition

There is strong appetite for a more walkable, year-round 'beach town' experience

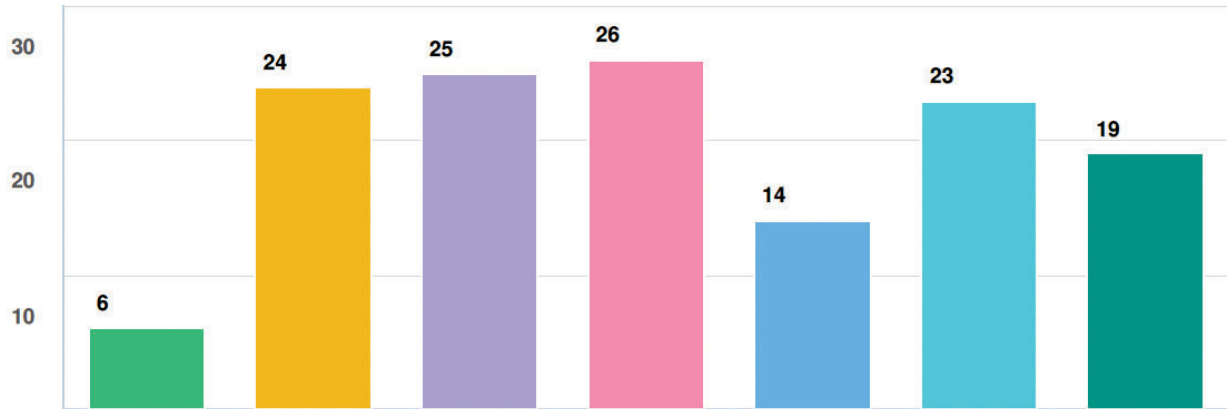
Across open-ended comments, respondents repeatedly described a gap in year-round places to gather, shop, and eat locally, especially near the waterfront. Many residents want more locally owned restaurants, cafés, patios, and small retail, alongside public realm improvements such as sidewalks, trails, benches, and welcoming streetscapes. The recurring 'main street' idea suggests that residents see tourism development and quality-of-life improvements as connected when investments enhance everyday community amenities.



Residents value tourism when it delivers community benefits, not just visitor volume

When asked about the most important benefits of tourism, respondents prioritized more local amenities (26 selections), support for small businesses (25), and local job creation (24). Events and activities for residents (23) and improved infrastructure (19) also ranked strongly. Overall, respondents signaled that tourism should help build a stronger community fabric and better services for residents, not just increase visitation.

Q11 | What benefits of tourism are most important to you?



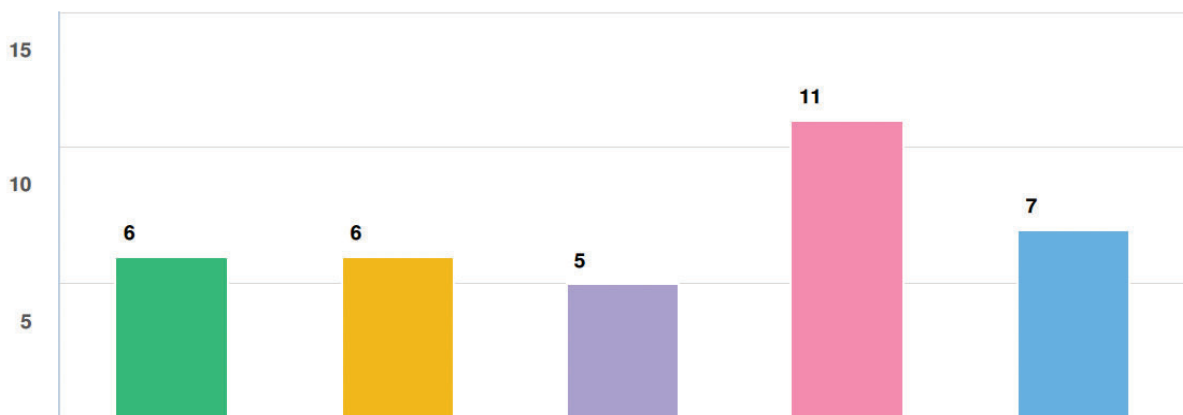
Question options

- Other (please specify)
- Local job creation
- Support for small businesses
- More local amenities
- Sharing Community pride
- Events and activities for residents
- Improved infrastructure

Growth concerns centre on environment, traffic/parking, and crowding

While many respondents expressed some level of support for the Town investing in tourism development and promotion, they also expressed meaningful concern about negative impacts. Environmental protection and traffic/parking were the most frequently selected issues to manage as tourism grows, followed by noise/crowding and waste management. Comments also raised the need to address visitor behaviour, enforcement, and fairness between residents and visitors.

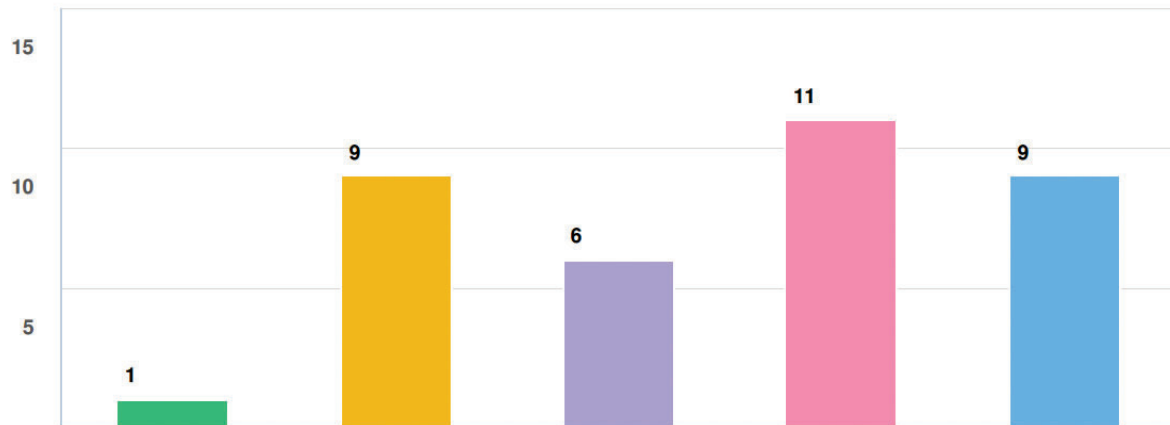
Q13 | How supportive are you of the Town investing in tourism development and promotion?



Question options

- Not supportive
- Neutral
- Slightly supportive
- Supportive
- Very supportive

Q14 How concerned are you about the potential negative impacts of increased tourism development (e.g., traffic, litter, housing...



People want a stronger Innisfil story, including Indigenous and local heritage

Several respondents emphasized the opportunity to better share what is uniquely Innisfil through storytelling, heritage and cultural programming, and stronger place identity. Comments also highlighted a desire to meaningfully include Indigenous histories and learning opportunities, moving beyond symbolic gestures to authentic interpretation, education, and potential partnership-driven programming.

Next Steps

- Use survey findings to refine the Tourism Strategy's priorities for experience development, placemaking, and destination stewardship.
- Translate the strongest experience demands (waterfront/nature, local food and beverage, locally owned retail, festivals/events) into actionable investment and partnership opportunities.
- Integrate impact management actions into the Strategy and Implementation Plan (e.g., environmental stewardship, parking/traffic planning, waste management, and visitor behaviour expectations).
- Validate themes alongside other engagement inputs (industry interviews, Tourism Summit feedback) to ensure a balanced approach that serves residents and the visitor economy.

Questions and Feedback

If you are part of the Town of Innisfil tourism community and have comments or concerns about how your input is reflected in this summary, please contact:

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We'd be happy to hear from you to better understand your perspectives.



A PRACTICAL GUIDE TO ESTABLISHING A MUNICIPAL ACCOMMODATION TAX (MAT)

AN ONTARIO-FOCUSED, IMPLEMENTATION-READY ROADMAP FOR MUNICIPALITIES



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i This guide is designed for municipal staff and elected officials who want a clear, step-by-step approach to establishing a Municipal Accommodation Tax (MAT) in Ontario. It combines legislative requirements, real municipal practice, and on-the-ground implementation lessons into a practical, decision-support tool.

The intent is not only to explain *what* a MAT is, but *how* to successfully design, adopt, implement, and manage one in a way that is transparent, defensible, and aligned with community outcomes.

What is Municipal Accommodation Tax (MAT)?

A Municipal Accommodation Tax is a locally imposed tax on short-term or transient accommodation stays (generally less than 30 consecutive days). It is collected by accommodation providers at the point of sale and remitted to the municipality.

MAT revenues are typically used to:

- Support destination marketing and tourism promotion
- Invest in tourism product and experience development
- Support events and festivals
- Offset visitor-related infrastructure and service costs
- Advance broader economic development priorities tied to tourism

A MAT is discretionary. Municipalities choose whether to implement it and how it is structured.

Legislative Authority and Regulatory Framework (Ontario)

Ontario municipalities derive MAT authority from:

- [Section 400.1 of the Municipal Act, 2001](#)
- [Ontario Regulation 435/17 \(Transient Accommodation Tax\)](#)

Key implications of this legislation:

- MAT is optional, not mandatory (for the Municipality)
- “Transient accommodation” is not defined by the province and must be defined locally
- Municipalities have flexibility in setting the tax rate
- A portion of MAT revenues must be shared with an eligible non-profit tourism entity
- Harmonized Sales Tax (HST) applies on top of the MAT

This flexibility allows municipalities to tailor MAT programs to local conditions, but it also places responsibility on municipalities to make clear, defensible policy choices.



Best Practice: Adopt an Education-First Approach

Before formal readiness assessments or policy decisions begin, municipalities benefit from taking an education-first approach. This step is especially important where MAT is new, politically sensitive, or poorly understood.

An education-first approach focuses on building a shared understanding among Council, senior leadership, and key community partners about what a MAT is, why municipalities use it, and what problems it helps solve.

Educating Council and Decision-Makers

Council education should occur early and ideally before any by-law drafting. Key messaging typically includes that:

- A MAT shifts a portion of tourism-related impacts from local taxpayers to visitors who use local services and infrastructure
- Without a MAT, municipalities often subsidize tourism infrastructure (events, marketing, public realm improvements) through the property tax base
- MAT is discretionary and locally controlled: municipalities decide the rate, scope, and allocation priorities
- MAT revenues can be used strategically to strengthen local economies and infrastructure, not just promote tourism

This framing helps move MAT discussions away from being seen as a “new tax” and toward being understood as a cost-sharing tool.

Addressing Equity Between Communities

An education-first approach should also underscore the equity implications of a MAT.

Municipalities without a MAT often face growing disparities compared to those with one, including:

- Urban or high-tourism municipalities with MATs can reinvest in marketing, events, and infrastructure, reinforcing their competitiveness
- Rural or emerging destinations without MATs rely more heavily on limited property tax bases, which can slow tourism development
- Over time, this creates a widening gap between communities that can reinvest their visitor revenues and those that cannot

Positioning the MAT as a tool to level the playing field (particularly for rural, northern, and emerging destinations) is often persuasive for Council and the public.

Note: Engagement with tourism operators should happen early in the process. This may be done in parallel with Council and Administration education or sequentially, based upon the community.

Using Case Studies to Build Confidence

An education-first approach should include real, Ontario-based examples that show how Municipal Accommodation Tax (MAT) revenues are being used successfully in communities with similar scale, tourism pressures, and fiscal realities. Concrete examples help Council move from theory to practice and reduce uncertainty about outcomes.

Overarching examples:

- Investing in wayfinding, trails, waterfronts, and public realm improvements that benefit residents and visitors
- Funding destination marketing organizations to attract shoulder-season visitation
- Supporting festivals and events that generate overnight stays
- Building tourism product development capacity in rural and smaller communities
- Improving public services and infrastructure to mitigate the impacts of increased visitation such as public washrooms and increased frequency of waste pick ups

More concrete examples help Council visualize outcomes and reduce uncertainty. Below is a list of Ontario case studies that demonstrate how MAT revenues have been used to strengthen local economies, support tourism growth, and reduce reliance on property taxes.

FUNDING DESTINATION MARKETING AND SHOULDER-SEASON VISITATION

Town of Huntsville: Huntsville Municipal Accommodation Tax Association (HMATA)

In Huntsville, MAT revenues are used to support destination marketing and visitor attraction through the Huntsville Municipal Accommodation Tax Association (HMATA), an independent, non-profit tourism organization established specifically to manage and invest MAT funds.

A key focus of HMATA's work is shoulder-season and year-round visitation, particularly in a community where summer demand is already strong. MAT-funded initiatives have supported:

- Fall and shoulder-season marketing campaigns
- Winter visitation and off-season event promotion
- Tourism product and experience development that encourages longer stays

This approach demonstrates how MAT can be used not to “sell more of what is already full,” but to stabilize employment, support year-round businesses, and improve occupancy outside peak periods, without increasing pressure on local taxpayers.



INVESTING IN WAYFINDING, WATERFRONTS, TRAILS, AND PUBLIC REALM IMPROVEMENTS

Town of Niagara-on-the-Lake: Visitor-Serving Public Realm Enhancements

In Niagara-on-the-Lake, Municipal Accommodation Tax revenues have been used to support visitor-serving public realm improvements that enhance how visitors navigate, experience, and move through the community, particularly in high-traffic tourism areas.

MAT-supported initiatives have included:

- Wayfinding and directional signage to help visitors navigate the historic Old Town, waterfront areas, and key attractions
- Enhancements to visitor corridors and public spaces that support festivals, cultural events, and pedestrian activity
- Improvements that strengthen the overall visitor experience while also benefiting residents and local businesses

Rather than funding core municipal infrastructure, MAT revenues are applied to tourism-related enhancements that complement municipal capital investments and directly support the visitor economy.



SUPPORTING FESTIVALS AND MAJOR EVENTS THAT GENERATE OVERNIGHT STAYS

City of Stratford: MAT-Supported Festivals and Experiences

In Stratford, Municipal Accommodation Tax revenues are used to support festivals, cultural programming, and tourism experiences that are demonstrably linked to overnight visitation, delivered through Destination Stratford the eligible tourism entity.

These MAT-supported investments complement events and festivals outside of the anchor Stratford Festival season and help diversify the visitor economy through:

- Cultural and culinary festivals that attract multi-day visitors
- Special events that animate the downtown and cultural district
- Experience development that encourages longer stays beyond single performances

These initiatives require upfront investment but deliver clear returns through hotel bookings, restaurant spending, and broader economic activity. By using MAT to support visitor-generating festivals and experiences, Stratford ensures that tourism-related programming is funded by visitors, rather than being subsidized solely through the property tax base.

This example demonstrates how MAT can function as a strategic event and experience development tool, helping communities attract visitors who stay overnight rather than relying primarily on day-trippers.

BUILDING TOURISM CAPACITY IN MID-SIZED AND RURAL ONTARIO COMMUNITIES

In mid-sized and rural Ontario municipalities, MAT revenues have helped build baseline tourism management capacity that would otherwise be difficult to fund. This includes:

- Professional destination management and coordination, or increased capacity within Economic Development and Tourism departments
- Visitor services and information delivery
- Product development support for local operators
- Marketing that individual businesses cannot fund on their own

Without MAT, these costs often fall to municipal general revenues or are left unfunded altogether.

This highlights a MAT as a tool that helps level the playing field between municipalities with strong tax bases and those with limited fiscal capacity, particularly important in rural and tourism-dependent communities.

Using real, local examples helps Council visualize outcomes, understand risk, and see a MAT as a practical, proven tool rather than an abstract policy concept.

At this stage, Council and senior leadership should:

- Understand MAT purpose and regulations
- See MAT as a taxpayer-protective and equity-enhancing tool
- Be aligned on the role MAT could play in local economic and tourism strategy

Setting this foundation significantly improves the quality and speed of later policy decisions.



Establishing a Process

Before drafting a by-law or announcing a tax, municipalities should undertake a local readiness assessment to understand whether the conditions are in place for successful MAT implementation.



Questions to ask in this step:

- Do we understand and have data on our local accommodation market (hotels, motels, B&Bs, short-term rentals, camp cabins, etc.)?
- Do we already have a short-term rental licensing or registration system in place?
- Are there existing municipal policies, zoning provisions, or by-laws that restrict or prohibit certain forms of transient accommodation, and if so, which accommodation types would actually be eligible to collect a MAT?
- How do these restrictions affect the potential scale and financial viability of a MAT?
- Is Council aligned on the purpose of MAT revenue?
- Do we have staff capacity to administer and enforce the program?

Municipalities that align MAT implementation with existing land-use policy, licensing, compliance, and monitoring systems tend to see higher compliance, clearer expectations for operators, and lower administrative burden.

STEP ONE: ASSESS FINANCIAL VIABILITY AND REVENUE POTENTIAL

Before proceeding to by-law development or rate setting, municipalities should assess whether a Municipal Accommodation Tax is financially viable and strategically worthwhile in their local context.

This step helps Council understand the scale of potential revenues, the local definition of “transient accommodation market,” the costs of implementation, and whether MAT will meaningfully support community priorities.

1. Inventory Eligible Accommodation Supply

Begin by identifying the accommodations that could be subject to MAT, including:

- Hotels and motels (number of properties and rooms)
- Bed and breakfasts and inns
- Short-term rentals (licensed and estimated unlicensed)
- Tourism cabins or similar accommodation units

This inventory can draw from:

- Municipal licensing and registration systems
- Property records and zoning
- DMO, RTO, or industry data
- Platform estimates (for STRs)

Understanding the size and composition of the accommodation market is foundational to creating realistic revenue projections and for defining the local understanding of “transient accommodation.”

2. Estimate MAT Revenue Potential

Once accommodation supply is understood, municipalities can estimate MAT revenues using a basic model:

$$\text{Estimated MAT Revenue} = (\text{Number of rooms} \times \text{Average occupancy rate} \times \text{Average daily rate} \times \text{MAT rate})$$

Where possible, use:

- Regional or local occupancy rates from DMOs or RTOs
- Provincial data from the Ontario Ministry of Tourism, Culture and Sport (e.g., [Ontario Hotel Statistics Dataset](#))

This exercise does not need to be perfect, its purpose is to determine whether MAT revenues are likely to be:

- Modest (e.g., covering marketing campaigns)
- Meaningful (e.g., supporting infrastructure, events, or staffing)
- Transformational (e.g., enabling long-term destination management and infrastructure investments)

3. Identify Implementation and Ongoing Costs

Municipalities should also assess the costs required to implement and administer a MAT, including:

- By-law development and legal review
- Education and communications (Council, operators, public)
- Enforcement and compliance (including STR enforcement, if applicable)
- Financial administration and reporting
- Existing staff time or new staffing requirements

This allows Council to see net benefit, not just gross revenue.



4. Determine Whether MAT is “Fit for Purpose”

At the end of this step, municipalities should be able to answer:

- Is the expected MAT revenue sufficient to justify implementation?
- What scale of outcomes could MAT realistically support?
- Would MAT meaningfully reduce reliance on the property tax base?
- Does the municipality have the capacity to administer MAT responsibly?

If the answer is “yes,” the municipality can confidently proceed to defining scope, rates, and governance, backed up by data-informed information.

Example: Estimating MAT Revenue Potential

Gather Destination Statistics

Let’s assume an example municipality has:

- 5 hotels
- 100 rooms per hotel
- 500 total hotel rooms
- Average Daily Rate (ADR): \$180
- Average Occupancy Rate: 69% (provincial average)
- 365 days per year

Estimated Annual Room Nights

Total possible room nights per year: (# of rooms) x (# of days) = (total number of destination room nights)

Estimated occupied room nights: (total number of destination room nights) x (avg. occupancy rate) = (total # of occupied room nights)

Using our example:

Total possible room nights per year: 500 rooms x 365 days = 182,500 room nights

Estimated occupied room nights: 182,500 x 69% = 125,925 occupied room nights

Estimate Total Annual Room Revenue

(Total # of occupied room nights) x (Average Daily Rate) = (Total annual accommodation revenue within the destination)

Using our example:

125,925 occupied room nights x \$180 ADR = \$22,666,500 in annual accommodation revenue

Run Scenario Models of Different MAT Rates

(Estimated total annual room revenue) x (MAT Rate) = Estimated Annual MAT Revenue

Scenario	MAT Rate	Estimated Annual Accommodation Revenue	Calculation	Estimated Annual MAT Revenue	What This Level of MAT Could Support
Scenario A	4% MAT	\$22,666,500	\$22,66,500 x (0.4)%	\$906,660	<p>Fully funded destination marketing organization</p> <p>Several mid-scale festivals or events annually</p> <p>Baseline wayfinding and visitor infrastructure</p> <p>Reduced reliance on property tax funding for tourism services</p>
Scenario B	6% MAT	\$22,666,500	\$22,666,500 x (0.06)% =	\$1,359,990	<p>Dedicated tourism infrastructure reserve</p> <p>Event hosting and bid funds</p> <p>Visitor management or enforcement capacity</p> <p>Shoulder-season programming</p> <p>Partial funding for capital or public-realm improvements</p>

Incremental Impact of Increasing the MAT Rate

Comparison	Annual Impact
Difference between 4% and 6% MAT	+\$453,330 per year (for the above example)

STEP TWO: DEFINE “TRANSIENT ACCOMMODATION” LOCALLY

(If not already in place)

Because provincial legislation does not define transient accommodation, municipalities must formally establish what constitutes transient accommodation through policy and by-law, *where this has not already been completed*. This step focuses on confirming or formally establishing the regulatory definition that will later be relied on for MAT application and enforcement, it does not involve drafting the MAT by-law itself.

This step is required only if existing municipal by-laws, zoning provisions, or licensing frameworks do not already clearly and consistently define transient accommodation for regulatory and enforcement purposes. If a municipality already has a clear, enforceable definition of transient accommodation in place, this step may involve confirming alignment rather than undertaking new by-law work.

This is a formal regulatory process, not an internal or administrative exercise, and should be aligned with existing land-use, zoning, and licensing policies.

As a reminder, accommodation types typically addressed through by-law include:

- Hotels and motels
- Inns and lodges
- Bed and breakfasts
- Short-term rentals (e.g., Airbnb, VRBO), where permitted
- Tourist cabins or similar accommodation units

In some municipalities, short-term accommodations (STAs) are licensed or regulated through different by-laws, approval processes, or departments than traditional accommodations such as hotels and motels. Where this is the case, municipalities should ensure that the formal definition of transient accommodation, and the application of MAT, is consistent across regulatory frameworks, even if licensing pathways differ.

Differences in licensing or approval processes should not create ambiguity about which accommodation types are required to collect and remit MAT, or result in uneven treatment across accommodation providers.

Where separate licensing regimes exist, municipalities should confirm:

- That all permitted transient accommodations are clearly captured in the MAT by-law
- That collection and remittance requirements are applied equitably
- That administrative and enforcement responsibilities are clearly assigned

Decisions made through this formal process directly affect:

- Which accommodation types are legally required to collect and remit MAT
- Revenue potential and financial viability
- Equity across accommodation providers
- Compliance, enforcement, and legal defensibility

Clear, enforceable definitions, grounded in existing municipal policy, help prevent regulatory gaps, disputes, and enforcement challenges later in the implementation process.

STEP THREE: DECIDE ON THE MAT RATE

Ontario municipalities are not restricted to a 4% MAT rate. While many municipalities historically adopted a 4% rate, recent practice demonstrates that higher rates are legally permissible when supported by Council rationale and local priorities.

Examples from practice include:

- Permanent MAT rates above 4%
- Temporary rate increases tied to major investments, recovery initiatives, or major events

When determining a rate, municipalities should consider:

- Regional and peer benchmarking
- Local accommodation price sensitivity
- Visitor demand and seasonality
- Community tolerance and political context
- Intended use of revenues
- Administrative capacity and needs for MAT implementation and oversight

A clearly articulated rationale is essential, especially when adopting a rate above 4%.

Ontario Municipal Accommodation Tax (MAT) Rates Comparison Chart

Municipality	MAT Rate	Status	Notes/Rationale
Toronto	8.5% (temporary) Usual rate: 6%	Temporary	Increased from 6% to 8.5% June 1, 2025 – July 31, 2026 to support FIFA World Cup 2026 hosting costs, city services, and infrastructure pressure
Ottawa	6%	Permanent	In place since 2018; supports Ottawa Tourism as a destination marketing and destination development organization, including major event attraction, investment attraction, and strategic initiatives such as the Destination Development Fund, alongside complementary city-led tourism initiatives.
Windsor	6%	Permanent	Increased from 4% effective April 1, 2025 to strengthen tourism investment and competitiveness
Ajax	5%	Permanent	Effective April 1, 2025; shared with Durham Tourism for destination marketing and development
Kingston	4%	Permanent	Supports Kingston Accommodation Partners and tourism initiatives
Barrie	4%	Permanent	Implemented to support Tourism Barrie and visitor-related initiatives
London	4%	Permanent	Funds London Tourism and tourism growth initiatives

Sudbury	4%	Permanent	Supports Destination Northern Ontario–aligned tourism priorities
Oakville	4%	Permanent	50% transferred to Visit Oakville; remainder retained for municipal tourism priorities
Waterloo Region	4%	Permanent	Shared between 7 municipalities and regional tourism organization
Stratford	4%	Permanent	Supports destination marketing and tourism development through Visit Stratford
Huntsville	4%	Permanent	Supports Huntsville/Lake of Bays Tourism and local tourism initiatives

Note: MAT applies to accommodations of fewer than 30 consecutive days and is subject to HST in all cases.

STEP FOUR: IDENTIFY OR CONFIRM AN ELIGIBLE TOURISM ENTITY

Ontario regulations require that a minimum of 50% of MAT revenues be shared with an eligible non-profit entity whose mandate includes the promotion (marketing and/or development) of tourism in Ontario.

At this stage, municipalities should focus on fit, capacity, and alignment, not just eligibility.

Early actions should include:

- Confirming whether an eligible organization already exists (e.g., Destination Marketing/Management Organization, RTO, or other non-profit tourism entity)
- Engaging with operators to determine the best fit-for-purpose organization
- Identifying whether the organization meets provincial eligibility requirements for receiving MAT revenues

Governance and Mandate Alignment Check

Before formalizing any funding relationship, municipalities should assess whether an existing eligible tourism entity is the right fit to manage MAT revenues based on actual community needs.

While many DMOs are well suited to managing MAT funds, their mandates are often primarily focused on marketing. A marketing-only mandate may not be sufficient if the municipality's priorities include:

- Investing in infrastructure or public realm improvements
- Supporting event or sport hosting capacity
- Advancing experience or product development
- Managing visitor impacts and seasonality

At this stage, municipalities should ask:

- What is the current mandate of the eligible tourism entity?
- Does it extend beyond marketing into destination management or development?
- Does the organization have the governance, financial controls, and expertise to manage non-marketing investments?

- Would a shared or hybrid model (e.g., splitting MAT revenues between marketing and municipal delivery) better align with community priorities?

Addressing mandate alignment early helps prevent misalignment later and ensures MAT revenues are deployed where they create the greatest local value.

Assess Organizational Capacity

Once mandate alignment is confirmed, municipalities should assess:

- Governance structure and decision-making processes
- Financial controls and audit readiness
- Reporting and performance measurement capacity
- Staff expertise and administrative capacity

This step ensures the organization can responsibly manage public funds.

Formalize the Relationship

Once the appropriate delivery model is confirmed, it is mandated that the Municipality and eligible tourism entity formalize the relationship through a funding or service agreement that clearly outlines:

- Roles and responsibilities
- Eligible uses of MAT funds
- Reporting and audit requirements
- Performance metrics
- Term and renewal conditions

Clear agreements reinforce accountability, transparency, and long-term stability.



Governance Models for Managing MAT Revenues

Ontario municipalities use several governance models to manage and distribute MAT revenues. The most effective model depends on local context, capacity, and intended outcomes.

Understanding these options helps municipalities design a MAT structure that aligns with community priorities, organizational capacity, and accountability expectations.



DMO/RTO-Led Model

(MAT revenues transferred primarily to an existing Destination Marketing Organization or Regional Tourism Organization)

In this model, net MAT revenues are transferred to an eligible tourism entity, typically a DMO/RTO, to deliver tourism-related outcomes on behalf of the municipality.

Characteristics:

- Municipality does not retain MAT funds for direct municipal spending
- Eligible tourism entity manages and allocates MAT funds
- Municipality retains policy authority, oversight, and accountability through a formal agreement

Best suited for municipalities where:

- The primary objective of MAT is marketing and promotion or the eligible tourism entity has a mandate not primarily focused on marketing and aligns with community tourism needs
- The DMO has strong governance, reporting, and delivery capacity
- Infrastructure and capital needs are addressed through other funding sources where the mandate of the eligible tourism organization is primarily marketing

Key risk if misaligned:

Limited flexibility if community priorities extend beyond marketing

Common practice:

- The municipality collects MAT
- Administrative costs are deducted
- Nearly all remaining funds are transferred to the eligible tourism entity
- The municipality does not retain MAT for direct municipal spending

Ontario example: Ottawa

In Ottawa, the majority of net MAT revenues are transferred to Ottawa Tourism, the city's designated destination marketing organization/regional tourism organization.

How it works:

- The City of Ottawa collects the MAT from eligible accommodations
- Administrative costs are deducted
- Net MAT revenues (5%) are transferred to Ottawa Tourism through a formal funding and accountability agreement
- Ottawa Tourism is responsible for marketing, sales, and destination development activities
- The City retains policy authority, performance oversight, and reporting requirements, but does not direct day-to-day spending decisions

How MAT is positioned:

MAT is treated primarily as a destination marketing and visitor economy development tool, rather than a general municipal revenue source. Capital infrastructure, public realm improvements, and community facilities are funded through other municipal or senior government programs.

Why this example is relevant:

Ottawa demonstrates how a municipality can:

- Maintain accountability and policy control
- Leverage a professionally governed tourism organization
- Keep MAT spending focused on visitor economy outcomes
- Avoid pressure to use MAT for unrelated municipal operating needs

This model is most applicable in communities where:

- Tourism marketing and sales are the primary MAT objectives or the selected DMO/RTO has a destination management model that meets the needs of the tourism ecosystem
- A capable, arm's-length tourism organization already exists
- Municipalities want clear separation between revenue collection and program delivery

Shared Governance Model

(MAT split equally between a tourism entity and the municipality)

In a shared model, MAT revenues are divided equally between an eligible tourism entity (often a DMO) and the municipality. Each party is responsible for delivering outcomes aligned with their mandate.

Town of Ajax – Durham Tourism

The Town of Ajax operates a shared governance Municipal Accommodation Tax model, where MAT revenues are split evenly (50/50) between the municipality and an eligible tourism entity.

Under this model:

- 50% of net MAT revenues are transferred to Durham Tourism, the regional destination marketing organization
- 50% of net MAT revenues are retained by the Town of Ajax for municipal tourism-related initiatives

Each party is responsible for delivering outcomes aligned with its mandate:

- Durham Tourism uses its portion of MAT funding for destination marketing, promotion, and visitor attraction at the regional level
- The Town of Ajax uses its portion to support local tourism initiatives, event hosting, placemaking, and visitor-serving investments that align with municipal priorities

The relationship is governed through formal agreements that set out:

- Eligible uses of MAT funds
- Reporting and accountability requirements
- Performance metrics and outcomes
- Roles and responsibilities of each party

Explore Waterloo Region – (Cities of Waterloo, Kitchener, and Cambridge, and Woolwich, Wilmot, Wellesley, and North Dumfries Townships)

Waterloo Region's seven lower-tier municipalities share MAT revenues through a coordinated regional model. 50% of MAT revenues are transferred to the DMO, Explore Waterloo Region, for destination marketing and tourism development, while the remaining revenues are retained within the municipal system and shared between the local municipalities (40%) and the Region (10%). The 40% of revenues that are shared between the seven lower-tier municipalities are split based on their percentage of the overall Regional accommodation inventory. Meaning, the more accommodations the community has, the greater their portion of the 40%.

This approach:

- Supports consistent, Region-wide tourism marketing
- Preserves local municipal control over a portion of MAT revenues for community priorities
- Enables both regional coordination and local tourism-related investment in markets such as sport hosting, business events, and travel trade

Best suited for municipalities where:

- Community needs include both marketing and infrastructure or experience development
- The municipality wants to retain direct control over part of the investment
- Accountability and flexibility are priorities

New or Expanded Tourism Entity Model

(Creation of a new entity or expansion of an existing mandate)

Some municipalities choose to:

- Create a new eligible tourism entity, or
- Expand an existing tourism entity's mandate beyond marketing to include destination management, product development, or infrastructure coordination

Best Suited for Municipalities Where:

- Existing tourism organizations are not well aligned with community needs
- MAT revenues are significant enough to justify broader management capacity
- Long-term destination management and development is a priority
- The community wants a dedicated entity focused exclusively on visitor economy outcomes

Key Considerations:

- Requires additional setup time, governance design, and organizational development
- Needs strong municipal oversight, clear agreements, and disciplined reporting
- Works best when there is clarity about what MAT should (and should not) fund

Ontario Example: Town of Huntsville – Huntsville Municipal Accommodation Tax Association (HMATA)

The Town of Huntsville implemented its Municipal Accommodation Tax through Council by-law in 2018, with the tax coming into effect on April 1, 2019. The rate is 4 % applied to all short-term accommodations of less than 30 days including hotels, motels, inns, bed and breakfasts, and short-term rentals.

Governance Structure

Instead of directing all MAT revenues to the municipality, Huntsville established a dedicated tourism organization (HMATA) to manage and deploy a large portion of the funds for tourism development and promotion.

This structure represents a hybrid governance model where responsibilities are shared between the municipality and an independent tourism entity:

- HMATA receives a majority share of net MAT revenues and focuses on destination marketing and development, including tourism product enhancement, events, outdoor activities, and shoulder-season growth.
- The Town of Huntsville retains the remaining portion of net MAT revenues to support municipal tourism-related initiatives that benefit both residents and visitors.

Under recent allocations approved by Council, the split is approximately 60 % to HMATA and 40 % to the Town for a defined period, reflecting ongoing local calibration of the model.

HMATA's Role and Focus

HMATA is a non-share capital corporation with a mission to promote and develop tourism in Huntsville, with a long-term vision of making Huntsville one of Ontario's most visited year-round destinations.

Key aspects of HMATA's mandate include:

- Marketing and attracting visitors across all seasons (especially shoulder and winter)
- Supporting tourism events and cultural activities
- Investing in tourism product development and enhanced attractions
- Offering grants and partnership programs to local organizations to support visitor attraction initiatives that encourage overnight stays, such as festivals, events, and tourism-related activities organized by community groups or businesses

How It Operates in Practice

Huntsville's MAT model demonstrates how an eligible, or newly established, tourism entity can act as a destination management and marketing organization while working closely with the municipality:

- HMATA receives the majority share of funds and makes investment decisions aligned with a strategic plan that supports year-round visitation.
- The Town retains a portion for complementary economic development and tourism-related programming.
- Both parties are expected to report publicly on how funds are used and what outcomes they achieve.
- Grants and partnership programs allow MAT funds to support a range of initiatives, from large events to outdoor attractions, that connect directly to increasing visitor demand and overnight stays.

Why This Model Matters

This structure illustrates several key points you can use when presenting MAT models to municipal leadership:

- It balances professional destination marketing and municipal oversight in a way that supports shared priorities.
- It allows a tourism organization to take the lead on visitor attraction and product development while the municipality retains control of complementary investments.
- By allocating funds based on strategic outcomes rather than departmental silos, the model supports integrated tourism and economic development ambitions

Model	Who Manages MAT Funds	Primary Focus	Strengths	Key Considerations
DMO-Led	Existing DMO/RTO	Marketing & Promotion	Simple structure, professional marketing	Limited flexibility if needs go beyond marketing
Shared Model	DMO + Municipality	Marketing + Infrastructure/ programs	Balanced control, strong accountability	Requires clear agreements and coordination
New/ Expanded Entity	New or re-mandated organization	Destination management & Development	Highly aligned to community needs	Longer setup time, governance complexity

STEP FIVE: ENGAGE ACCOMMODATION OPERATORS AND STAKEHOLDERS

Depending on the Municipality, this step may be best completed alongside Council/administration/engagement, education. Operator engagement is critical to successful MAT implementation. Accommodation providers collect the tax on the municipality's behalf and need clarity, predictability, and transparency.

Effective engagement approaches include:

- Early information sessions and briefings
- Plain-language explanations of MAT purpose and mechanics
- Clear examples of how the tax appears on guest invoices
- Honest discussion of administrative expectations

Common operator concerns typically relate to pricing competitiveness, administrative burden, and trust in how revenues will be used. Addressing these proactively improves compliance and reduces resistance.



STEP SIX: PUT THE REGULATORY FOUNDATIONS IN PLACE

(Supporting by-laws, licensing, enforcement authority, and internal capacity)

Before adopting a Municipal Accommodation Tax by-law, municipalities should ensure the regulatory and organizational foundations required to administer the tax are in place.

This step focuses on the supporting by-laws and systems that enable MAT to function effectively, such as accommodation licensing, land-use permissions, enforcement authority, and internal staffing capacity. In many municipalities, this is the most time-intensive phase of MAT implementation and can take one year or longer, particularly where short-term rental activity is significant or where regulatory frameworks need to be created or strengthened.

Establishing these foundations first helps ensure the MAT by-law is enforceable, equitable, and administratively feasible once adopted.

Implement or Strengthen Supporting By-laws

Key supporting regulations may include:

- Short-term rental licensing or registration by-laws
- Zoning or land-use permissions related to accommodation types
- Business licensing requirements
- Enforcement and penalty provisions

Without clear licensing and registration, municipalities often lack:

- Accurate data on eligible accommodations
- Fair and consistent MAT application
- Effective enforcement tools

Aligning MAT implementation with a robust STR licensing framework significantly improves compliance and equity across accommodation types.

Prepare Internal Municipal Capacity

Municipalities should identify which internal departments will be responsible for MAT-related work, such as:

- Finance (collection, reconciliation, reporting)
- Licensing and enforcement
- Legal services
- Economic development or tourism
- Communications and customer service

At this stage, municipalities should assess:

- Whether existing staff have the capacity and training to take on MAT administration
- Whether new staffing or contracted support is required
- How MAT responsibilities will be coordinated across departments

Any increased capacity requirements should be identified and budgeted for in advance.

Staff Training and Process Development

Before launching a MAT, staff should be trained on:

- MAT policy intent and legal framework
- Roles and responsibilities by department
- Compliance and enforcement procedures
- Operator inquiries and dispute resolution

Provider and Front-Line Staff Training

In addition to setting up financial and administrative systems, municipalities should plan for education and training of accommodation providers and front-line staff who will be interacting directly with visitors.

This training should equip operators and their staff to:

- Clearly explain what the MAT is and why it appears on guest invoices
- Communicate that MAT is a municipal tax, not a hotel surcharge
- Describe, at a high level, how MAT revenues are used to benefit the destination

Training tools may include:

- Plain-language FAQs for front-desk staff
- Short briefing sheets or digital training modules
- Consistent messaging that operators can share with guests

Providing clear, consistent messaging helps reduce confusion, deflects frustration away from operators, and reinforces transparency with visitors.

Timing Considerations

Municipalities should plan for this step to occur in parallel with, or prior to, MAT by-law drafting, not after.

Attempting to implement MAT without these foundations often leads to:

- Low compliance rates
- Operator frustration
- Increased enforcement costs
- Strained relationships with accommodation providers and the tourism sector

STEP SEVEN: DRAFT AND ADOPT THE MAT BY-LAW

(Can be undertaken concurrently with identifying the tourism entity)

The MAT by-law is the legal foundation of the program. It should clearly address:

- Definitions and scope of accommodation types
- The MAT rate
- Collection and remittance requirements
- Timing and frequency of remittances
- Penalties, interest, and enforcement provisions
- Any exemptions or special circumstances (ex. Accommodations being utilized part-time for underhoused peoples)

A successful launch also includes:

- Providing accommodation operators with ready-to-use visitor-facing explanations of the MAT
- Monitoring early feedback from operators and guests to identify confusion or messaging gaps
- Updating FAQs or training materials as needed during the first year

Legal review prior to Council adoption is strongly recommended to manage risk and ensure enforceability.

STEP EIGHT: ESTABLISH ADMINISTRATIVE AND FINANCIAL SYSTEMS

Once supporting by-laws, licensing frameworks, and internal capacity are in place, municipalities should establish the administrative and financial systems required to operationalize the MAT.

This step focuses on execution, ensuring the MAT functions smoothly, consistently, and transparently once implemented.

Considerations include:

- Registration and tracking of MAT-eligible accommodation providers (drawing on licensing and registration data)
- Separate line-item invoicing for MAT on accommodation bills
- Defined remittance schedules (monthly or quarterly)
- Internal reconciliation, tracking, and reporting processes
- Integration with existing finance, licensing, and compliance systems

STEP NINE: REPORTING, TRANSPARENCY, AND STRATEGIC USE OF FUNDS

Public reporting is essential to maintaining trust, legitimacy, and long-term support for a Municipal Accommodation Tax. Reporting should clearly demonstrate how MAT revenues are collected, allocated, and used, and what outcomes are achieved as a result.

MAT reporting should be coordinated between the municipality and the eligible tourism entity to provide a single, coherent picture of how visitor-generated revenues are being reinvested.

Rather than separate or duplicative reports, best practice is an integrated annual MAT report that documents:

- Total MAT revenues collected
- Administrative and implementation costs
- Funds retained and used by the municipality
- Funds transferred to the eligible tourism entity
- How MAT revenues were invested (by both parties)
- Outcomes and impacts achieved

This alignment should be clearly required through the MAT funding or service agreement with the eligible tourism entity.



Unsolicited Opinion

The quickest way to erode trust with the tourism community is to direct MAT revenues toward non-tourism or loosely related municipal operations.

Although MAT revenues flow through municipal financial systems, they are widely understood by operators and stakeholders as visitor-generated funds intended to support tourism-related outcomes.

Using MAT revenues to backfill unrelated municipal operating pressures, even if technically permissible, risks:

- Undermining operator buy-in and compliance
- Damaging relationships with tourism partners
- Weakening public confidence in the MAT
- Making future MAT adjustments or increases more difficult

Disciplined use of funds and clear, outcome-focused reporting are critical to long-term success.



Core Outcomes to Report On

To avoid overly detailed or repetitive reporting, municipalities should focus on a clear set of outcome areas, such as:

- Changes in visitation and overnight stays
- Event hosting and room nights generated
- Shoulder-season performance
- Tourism product, experience, or destination capacity improvements
- Visitor infrastructure and public-realm enhancements
- Progress toward strategic tourism, economic development, or reconciliation-related goals

This outcome-based approach keeps reporting meaningful, readable, and decision-relevant.

MAT revenues should be visibly aligned with agreed-upon tourism and community priorities. Clear alignment reinforces trust with accommodation operators, tourism partners, and the public, and supports long-term sustainability of the MAT program.

Beyond Reporting: Visibility, Legacy, and Public Benefit

While annual reporting is essential, municipalities that build lasting community support for a visitor economy go further by making MAT investments visible and tangible in the community.

This could include identifying and delivering legacy or high-visibility projects that clearly demonstrate how visitor-generated revenues are being reinvested for public benefit. Examples may include:

- Trailheads, wayfinding, or interpretive signage that explicitly notes “Funded by visitor-generated revenues”
- Public realm enhancements, event infrastructure, or visitor amenities with clearly announced MAT attribution
- Permanent or semi-permanent installations that reinforce the connection between visitation and community benefit

These visible investments serve multiple purposes:

- They reinforce transparency beyond formal reports
- They help residents see the direct value of MAT in everyday spaces
- They equip accommodation operators and front-line staff with concrete examples to share with visitors
- They strengthen long-term political and community support for the program

Municipalities may wish to incorporate MAT attribution standards into funding agreements and project design, ensuring that legacy investments clearly communicate the role of visitor-generated funding.

Done well, this approach shifts MAT from being perceived as a line item on a bill to being understood as a shared investment in place, funded by visitors and enjoyed by the community.



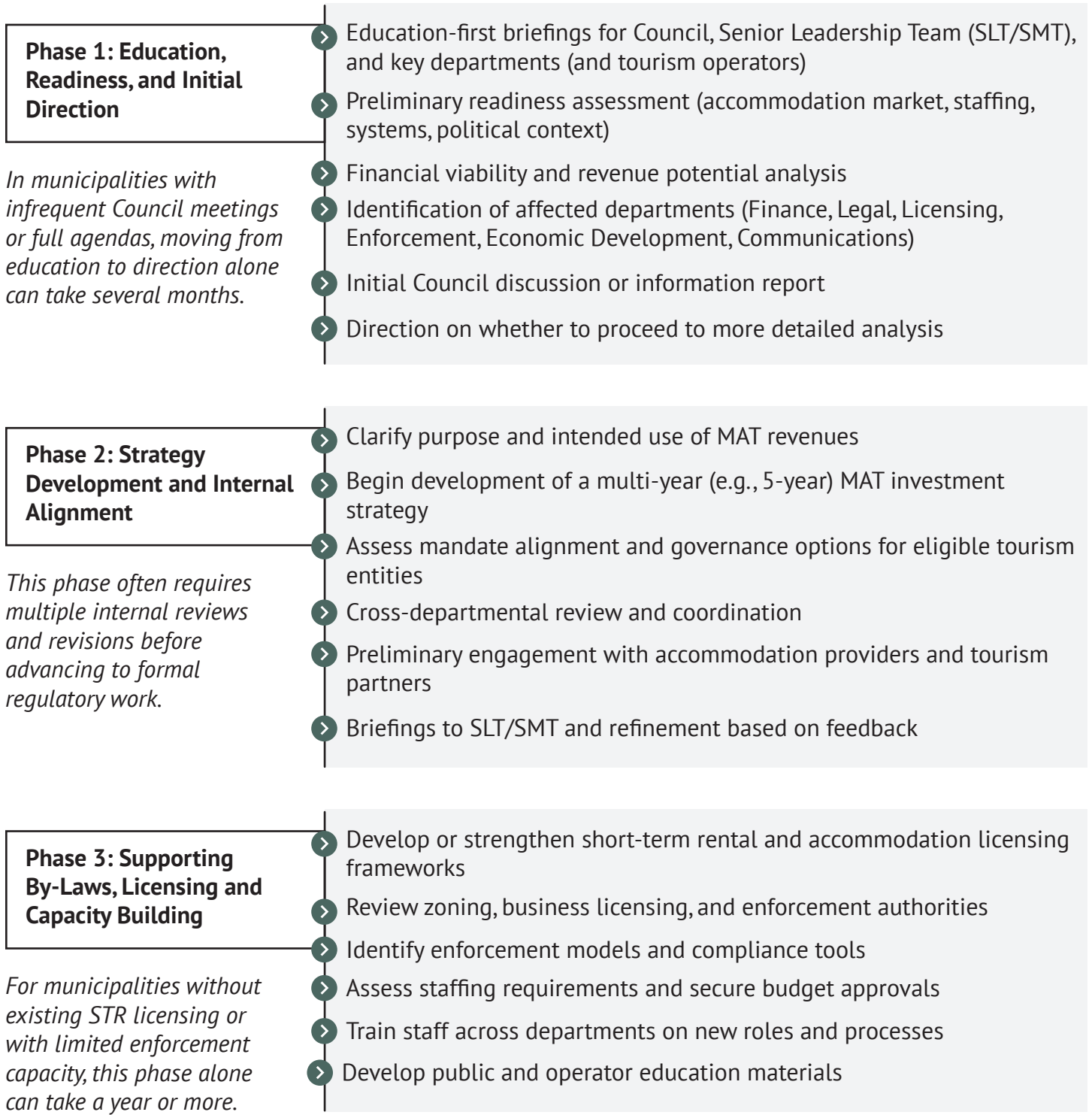
Practical Insight:

The strongest MAT programs can pair transparent reporting with visible, legacy investments that residents can point to and say, “Visitors helped pay for that.”



What the Full Process Typically Looks Like

Note: Timelines will vary by municipality depending on existing readiness, internal approval processes, staffing capacity, Council meeting frequency, and competing corporate priorities. In many municipalities, MAT implementation requires multiple layers of review and approval, including cross-departmental coordination, senior leadership review, and Council considerations, which can extend timelines significantly. Larger or more complex municipalities should anticipate a longer, phased process, particularly where new by-laws, licensing frameworks, or staffing capacity are required.



Phase 4: MAT Design and By-Law Development
(can overlap with Phase 3)

Council agenda timing can significantly affect this phase, particularly where MAT is competing with other major Municipal priorities or issues.

- Finalize definitions of transient accommodation
- Set MAT rate(s), including consideration of phased or temporary rates
- Draft MAT by-law and related agreements
- Legal review and revisions
- Internal approvals through SLT/SMT
- Scheduling of Council consideration based on agenda availability

Phase 5: Administrative and Financial System Setup

- Configure finance, tracking, and reporting systems
- Establish provider registration and remittance processes
- Integrate MAT administration with licensing and enforcement systems
- Finalize reporting requirements and templates
- Execute agreements with eligible tourism entity

Phase 6: Adoption, Launch, and Early Monitoring

- Configure finance, tracking, and reporting systems
- Establish provider registration and remittance processes
- Integrate MAT administration with licensing and enforcement systems
- Finalize reporting requirements and templates
- Execute agreements with eligible tourism entity

Important Governance Note

Municipalities should expect that MAT implementation will require:

- Review by multiple departments
- Oversight and endorsement by SLT/SMT
- Careful scheduling within Council agendas, which may meet monthly or bi-monthly
- Iteration based on legal, financial, and political considerations

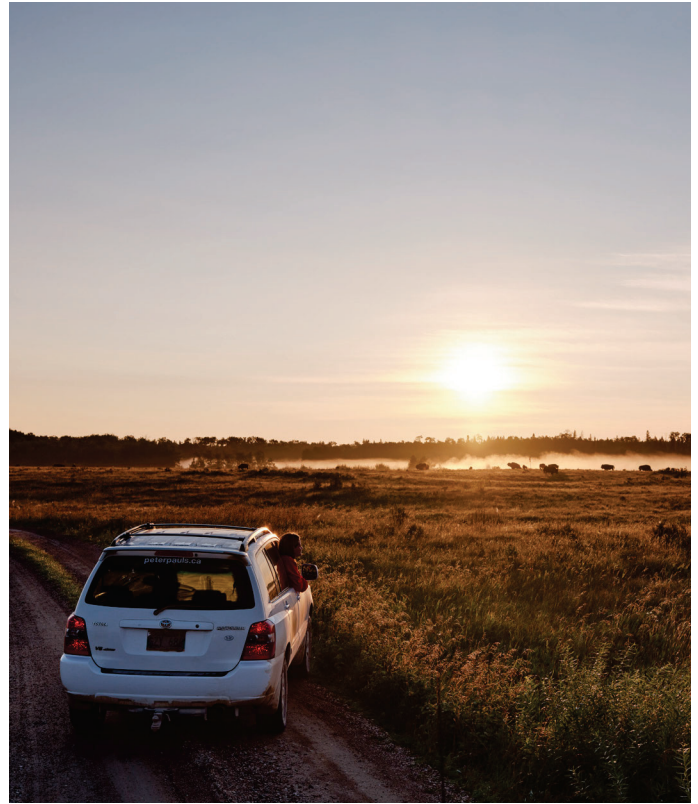
As a result, MAT implementation is best understood as a multi-year, phased initiative, not a short-term revenue tool.

Final Thought

A Municipal Accommodation Tax is not simply a revenue tool. It is a governance and investment decision that sits at the intersection of tourism, economic development, municipal operations, and community trust.

Municipalities that treat MAT as a phased, strategic initiative that is grounded in readiness, financial viability, cross-departmental coordination, and transparent reporting are more likely to see strong outcomes, higher compliance, and sustained support from both the tourism sector and the broader community.

Done well, a MAT becomes not just a source of funding, but a mechanism for mitigating harmful impacts of tourism on a community, fair cost-sharing, long-term destination management, and community-aligned investment.





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