

Executive Summary | June 2023

Destination Markham Tourism Strategic Master Plan (2024 – 2026)

DESTINATION MARKHAM BRANDING AND IMAGERY TO FOLLOW

CBRE

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Acknowledgements

The Destination Markham Corporation (“DMC”) Tourism Strategic Master Plan is the culmination of a strategic process that included research and analysis, public engagement, and plan development. It was created by the CBRE Project Team with the support of the DMC Project Management Team (PMT) comprised of DMC staff, the DMC Board of Directors, and the Project Advisory Team (PAG), made up of industry leaders, operators, and stakeholders.

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- **Councillor Amanda Collucci** – Ward 6 Councillor, City of Markham
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Introduction

Destination Markham Corporation (DMC or Destination Markham) was established in April 2020 as an arm's length municipal corporation. As the official Destination Management Organization (DMO) for Markham, Destination Markham is responsible for growing the city's visitor economy, establishing a destination brand that is distinct from the City of Toronto and other GTA "edge" cities, supporting businesses, developing partnerships, and creating new products and experiences to draw visitors and celebrate Markham's diversity.

Since its inauguration in 2020, Destination Markham has established robust foundations for future strategic decisions with strong partnerships in both local operators and regional organizations like Central Counties Tourism (RTO6). During the height of the COVID-19 pandemic lockdowns Destination Markham adopted a hyper-local strategy to address COVID challenges focusing on business support programs and local/regional marketing campaigns. The DMC 2022 Business Plan focused on industry growth and capacity building, and establishing its role in growing Markham's visitor economy.

Destination Markham identified the need to create an inaugural 3-Year Tourism Strategic Master Plan in its 2022 Business Plan. CBRE Tourism Consulting, in affiliation with Mellor Murray Consulting and Amplify Marketing & Communications, was commissioned to develop a plan to build strategic leadership and capacity for Destination Markham, provide insights to restart and strengthen Markham's tourism ecosystem, drive overall growth internally and externally, and define Markham's value proposition as a destination. The Strategic Master Plan was established to provide a strong organizational foundation to guide both industry partners and municipal investment, in order to develop Markham as a premier destination over the next three years, with specific action items relative to visitor attraction, infrastructure, physical assets, and visitor experience programs and services.

The CBRE Team completed an interactive strategic planning process with Destination Markham and its partners to move forward with S.M.A.R.T. objectives in the short-term, (1 year), mid-term (2-3 years), and long-term (beyond 3 years), based on comprehensive consultation and data analysis. This process included the following four phases:

- Phase 1: Environmental Scan – Destination Analysis
- Phase 2: Vision and Focus
- Phase 3: Strategy Development and Action Plan
- Phase 4: Final Tourism Strategic Master Plan and Presentations

 1 - Environmental Scan	 2 - Vision and Focus	 3 - Strategies & Action Plan	 4 - Tourism Strategic Master Plan
<p>Key Tasks</p> <ul style="list-style-type: none"> — Stakeholder Consultation — Document Review, Best Practice Review, Infrastructure Assessment, Trends Review, Organizational and Policy Assessment — Destination Analysis (PESTLE & SWOT) <p>Deliverables:</p> <ul style="list-style-type: none"> ➤ Environmental Scan Report 	<p>Key Tasks</p> <ul style="list-style-type: none"> — Visioning Session Focus Group — Draft Vision for Markham as a destination — Goals for tourism sector — 5 High-level Strategic Priorities <p>Deliverables:</p> <ul style="list-style-type: none"> ➤ Strategic Priorities Memo ➤ Vision Plan Report 	<p>Key Tasks</p> <ul style="list-style-type: none"> — Collaborate and finalize new Vision and Mission — Consolidate Strategic Pillars, Goals to direct outcomes, and Strategic Actions to meet Goals and fulfil Vision <p>Deliverables:</p> <ul style="list-style-type: none"> ➤ Draft Strategies & Actions Report 	<p>Key Tasks</p> <ul style="list-style-type: none"> — Draft Implementation Plan with organizations to lead/support actions, performance measures & costs — Final Master Plan Report and High Quality Publication <p>Deliverables:</p> <ul style="list-style-type: none"> ➤ Draft Final Tourism Strategic Master Plan (for DMC's internal use) ➤ Final Tourism Strategic Master Plan and High Quality Publication

Markham's Tourism Potential

The City of Markham is home to a range of experiences focused predominantly on heritage, sports, culinary and retail with notable facilities such as historic Unionville, Pacific Mall, and the Markham Pan Am Centre.

The majority of Markham's tourism assets are sports and recreation and culinary assets, and meeting and event facilities. Markham hosts a wide range of events, and many local cultural and culinary events have the potential to become **Hallmark Events**, including: Unionville Festival, Taste of Asia, and TD Markham Jazz Festival. There are also a number of large-scale meetings and conferences that utilize Markham's convention hotels. **The strength of Markham's group tourism markets and supporting infrastructure (e.g., hotels and restaurants), point to a strong opportunity for leadership in the GTA.**

Markham also has several strong **retail** assets, both in terms of destination malls, such as First Markham Place and Pacific Mall, and boutique retail centres in Main Street and Unionville. In addition to these robust retail anchors, Markham also features several authentic grocery stores and specialty stores that draw in visitors from surrounding communities. **Arts, culture & heritage** assets include the Flato Markham Theatre, the Markham Museum, the Varley Art Gallery, the Unionville Train Station etc., Markham's **nature and outdoor** assets in Markham include the Rouge National Urban Park and Milne Dam Conservation Park.

Markham is reasonably well connected via transit and train; however, a visitor would need to navigate several transit systems to travel to and within the city, thus travelling by car is the easiest and most direct way to travel.

A tourism investment and gap analysis identified **several potential infrastructure projects** for future consideration:

1. Multi-use event centre (convention centre / performing arts centre) – potentially locations: Downtown Markham / 19th Line between Hwy 404 and Woodbine
2. Outdoor amphitheater for festivals & events
3. Boutique hotel (on Main Street of Unionville and/or Markham Main Street)
4. Streetscaping with common wayfinding / signage
5. Family attractions, especially nature-based (e.g., Treetop Trekking at Milne Park or Rouge Valley Urban Park)
6. Year-round indoor attraction geared towards young adults
7. Waterfront enhancements at Milne Dam Conservation Park (e.g., rentals, swimming access, etc.)
8. Additional "Main Streets" e.g., redevelopment of Old Kennedy Road
9. Additional sports fields and related infrastructure meeting international standards

Fundamentals of the Tourism Strategic Master Plan

Markham’s Tourism Strategic Master Plan will set the course for the City’s efforts to grow the visitor economy, based on a robust strategic planning process. The Vision, Mission and Strategic Pillars are the fundamental elements that provide direction for the broad Goals and Strategic Actions.

Vision Statement

Markham is an unmatched GTA destination that connects visitors to a unique blend of cultural heritage, innovation, events, and authentic experiences.

Mission Statement

To be the leading authority for destination management, advancing Markham’s visitor economy with the support of its residents, businesses and government.

Strategic Pillar Areas

- 1. **Destination Management and Internal Governance**
- 2. **Research and Investment Attraction**
- 3. **Product and Experience Development**
- 4. **Destination Marketing**

Goals

The following goals give to direction on desired outcomes in order to fulfill the Vision.

Pillar	Goals
Destination Management and Internal Governance	<ul style="list-style-type: none">— To ensure DMC is a leading authority in destination management capable of growing Markham’s visitor economy— To provide the resources and support tourism related businesses need to thrive in Markham— To enhance the visitor and resident experience in Markham
Research and Investment Attraction	<ul style="list-style-type: none">— To collect and analyze meaningful visitor data to support product development and marketing

	<ul style="list-style-type: none"> — To broaden Markham's reach and renown as a destination — To attract future tourism investment to Markham
Product and Experience Development	<ul style="list-style-type: none"> — To identify and support major product and experience clusters for Markham — To establish a diverse mix of exciting and engaging tourism products and authentic experiences — To position Markham as a preferred destination for business, leisure and group events — To develop the hard and soft infrastructure to support Destination Markham's key visitor segments
Destination Marketing	<ul style="list-style-type: none"> — To build a unifying and credible corporate identity for DMC — To create an appealing consumer visitor brand that heightens awareness of Markham as a unique tourism destination

Recommended Strategies and Actions

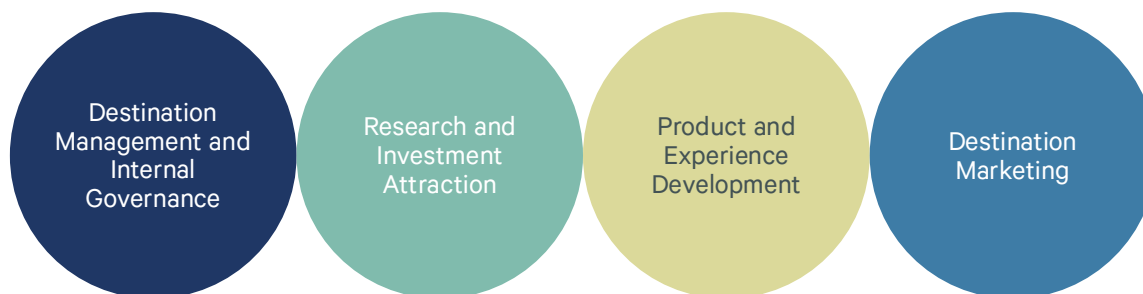
Destination management is the coordinated and thoughtful planning of all elements that make up a tourism destination. It involves attracting visitors, supporting businesses, addressing resident concerns, working with appropriate partners, and generally making the visitor economy a sustainable economic driver for Markham (including environmental, economic, social, infrastructure, and other relevant considerations).

DMOs today are tasked with addressing the interactions between visitors, the industry that serves them, the community that hosts them, and the environment in a broad sense. They need to facilitate partnerships to fulfill a collective destination vision. DMOs are expanding beyond the traditional marketing and promotion focus to include strategic planning, coordination, and management of the destination.

In order to adapt a strong destination management role in Markham and fulfill its mission, DMC must take a central role in advocacy for the visitor economy, highlighting data management and business intelligence, and aligning government, community, and industry needs. Destination Markham currently operates under the leadership of a shared position, as the Executive Director also manages the Flato Theatre.

To best support destination management and focus on strategic planning, coordination, and management of the destination, the strategic master plan includes aligning the organization structure with the four Strategic Pillar Areas.

Destination Markham Strategic Pillar Areas



Pillar #1 - Destination Management and Internal Governance

Destination Markham will lead destination management for Markham based on a combination of:

- Destination Management
- Destination Organization
- Destination Marketing

According to DestinationNEXT, MMGY NextFactor and Destination International research, the majority of DMOs (60%) focus on a combination of leisure, business and sport events, and about 1/3 of DMOs have a business model that

supports between \$1 million to \$5 million.¹ From an organizational structure perspective, the top 5 “ideal” roles for DMO staffing are:

- Destination Marketing
- Brand Management
- Destination & Product Development
- Data Research & Business Intelligence
- Destination Information Resource

Destination Analysts 2020 Survey of Tourism/Destination Marketing Organizations also indicates that pre-COVID, the average Canadian DMO was responsible for approximately 8.2 functions, and those with budgets under \$5 million were more likely to be responsible for economic development and bids to bring in sports, cultural and other public events. Based on pre-COVID data, DMOs with a budget below \$5 million typically consists of an average of 13.6 full-time equivalents (FTEs).

A study of three comparable Canadian DMOs (Tourism Mississauga, Tourism Richmond and Tourism Hamilton) provided the following insights into industry best practices. These DMOs are strongly focused on ensuring marketing is cohesive and reflective of a strong brand. These organizations **have** in-house marketing support and often work collaboratively with other organizations on promotion. Destination development activities tend to be aligned with experience development and business relations, often including industry insights and research, although this often overlaps with marketing and stakeholder relations. Both marketing and product development involve a **strong focus on events**. From an internal operations perspective, these peer DMOs consist of 10 FTEs, including a **dedicated Executive Director** who reports to the respective municipality.

Destination Markham was established with a base budget of just over \$2 million, based on a 50% share of Markham’s 4.0% Municipal Accommodation Tax (MAT). The approved Destination Markham budget for 2022 totaled \$1.69 million, which corresponds to the pause in MAT collection post COVID until April 2022. Despite that disruption, Destination Markham had a surplus of \$1.02 million in 2022.

Destination Markham’s 2023 Budget and Business Plan forecast a budget of \$2.18 Million, funded through the municipal accommodation tax, government grants, and earned income from various initiatives. This budget was approved by Council in March 2023. Year 1 of DMC’s Tourism Strategic Master Plan includes the following recommended allocations by pillar:

- Destination Management and Internal Governance – 30%
- Research and Investment Attraction – 15%
- Product and Experience Development – 30%
- Destination Marketing – 25%

There are several initiatives that would be appropriate considerations for the city’s portion of MAT revenue. They include several infrastructure projects that would benefit both visitors and residents and would therefore be ideal candidates for the funding.

Destination management is deeply rooted in the needs and wellbeing of the community and its environment. Ensuring both residents and visitors benefit from investment in the greater visitor economy should be top of mind. **Destination**

¹ Destinations International, MMGY NextFactor, [2021 DestinationNEXT Futures Study](#)

Markham has an opportunity to advocate for use of the City's share of MAT funding to support infrastructure that will benefit all. Ensuring resident and operator needs are being met will further support the economic and social benefits of the visitor economy.

Goals and Strategic Actions to achieve Goals for Pillar #1 – Destination Management & Internal Governance

Goals	Strategic Actions to Achieve Goals
To ensure DMC is a leading authority in destination management capable of growing Markham's visitor economy	<ol style="list-style-type: none"> 1. Establish a full-time Executive Director position to lead the Destination Markham team. 2. Provide regular updates to the DMC Board of Directors on implementation and tracking of strategic actions in the Tourism Strategic Master Plan. 3. Ensure DMC is consulted by and advises Council and Municipal Departments on policies and processes that impact the visitor economy 4. Create a Stakeholder Relations role to engage tourism-related businesses and associated partners. 5. Establish task forces, when needed, consisting of tourism operators and key stakeholders to provide guidance on the implementation of key destination development initiatives identified in the Tourism Strategic Master Plan. 6. Develop a Change Management Plan to reallocate internal staff into four functional areas to align with Strategic Pillars as described herein 7. Reallocate budget for DMC to support the Tourism Strategic Master Plan staffing suggestions and Implementation Plan. 8. Review internal documents and language relative to "tourism" and refocus to support the "visitor" economy. 9. Develop a tourism education and awareness plan for DMC Board members, City Council members, and key City staff on the benefits of a visitor economy to Markham 10. Schedule regular meetings with Markham's Economic Development Department to ensure strategies align with DMC's Vision and Mission
To provide the resources and support tourism related businesses need to thrive in Markham	<ol style="list-style-type: none"> 11. Create an information and awareness program to educate and inform tourism related businesses, tourism stakeholders, and residents on the economic benefits and impact of the visitor economy 12. Collaborate with the Markham Small Business Centre to support the sustainability and expansion of tourism businesses, with a focus on their unique needs 13. Develop a suite of information, data, and training resources to support tourism related businesses, including for example: <ol style="list-style-type: none"> a. The economic impact of tourism in Markham b. Visitor friendliness checklist c. Data analysis (sector studies, Prizm segment descriptions) d. Links to training programs and resources

	<ul style="list-style-type: none"> e. Links to other supporting tourism organizations (RTO6, TIAO, Destination Ontario, Culinary Tourism Alliance, TIAC, etc.) f. Funding programs g. Calendar of major tourism events and festivals taking place in Markham h. Upcoming Destination Markham product development, innovation and cooperative marketing programs.
	14. Collaborate with regional tourism partners to leverage the regional GTA experience and position Markham as a hub for a visit to the GTA.
To enhance the visitor and resident experience in Markham	<ul style="list-style-type: none"> 15. Build a web platform to encourage and facilitate collaboration between tourism businesses (e.g., log-in on the DMC website) 16. Organize regular meetings (e.g., quarterly) with tourism businesses to learn about new initiatives and opportunities to partner with DMC 17. Enhance the guest experience for visitors who are already coming to Markham to ensure they stay longer and do more in the community <ul style="list-style-type: none"> a. Encourage operators to direct guests to the DMC website for itineraries and accommodation ideas b. Ensure visitors are provided with many touch points to obtain directions to other activities, transit, parking, etc. c. Provide tools for businesses to cross-promote 18. Establish a Cultural and Visitor Hub in Downtown Markham – making it a vibrant, central location for new community and visitor-focused events, and a central place to direct visitors to other Markham Community hubs and experiences <ul style="list-style-type: none"> a. Work in collaboration with local businesses and the City’s Economic Development and Planning Departments to define boundaries of the Cultural & Visitor Hub b. Advocate for BIA development for Downtown Markham c. Advocate for the Downtown Markham hub as the location of the multi-use event and performing arts centre that can accommodate a range of CME and entertainment events, to be further defined through a full market feasibility study d. Advocate for the Downtown hub to be a central feature in other City strategies (e.g. active transportation strategy, transit, parking, etc.) e. Define and profile community hubs previously identified in the Gateway signage strategy f. Create a webpage to announce creation of the Hub and provide information on events

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- g. Allocate DMC summer staff or volunteers to act as DMC Ambassadors: provide information about events, and direct visitors to experiences and assets throughout Markham
 - h. Encourage event organizers to use Downtown Markham for their next event
 - i. Work with Economic Development to provide business advisory support to existing businesses, while working to attract new businesses that complement and support the development of a visitor experience in Downtown Markham
 - j. Work to centralize visitor-focused and community events in Downtown Markham
 - k. Establish wayfinding to direct visitors to Markham's community hubs
19. Advocate for interim transportation solutions through regional partnerships (in line with Research and Investment Attraction Strategic Action #5)
 20. Work with Economic Development to identify and prioritize tourism-aligned infrastructure throughout the City of Markham that also benefits residents (see [Infrastructure Assessment](#)).
 21. Develop a framework, including terms of reference and criteria for the allocation of the City's portion of MAT revenue to invest it into the visitor economy.
 22. Leverage internal research for the potential of a multi-use event centre, Cultural and Visitor Hub in Downtown Markham (including outdoor events), and other infrastructure as prioritized in collaboration with Markham Economic Development.
 23. Create a visitor-friendliness plan to help tourism businesses direct residents and visitors to notable assets and experiences within Markham (e.g. enhance cross-promotion, increasing length of visitor's stay in Markham)
 24. Educate decision-makers on the importance of large-scale sporting events, business events (conventions), and festivals in order to grow Markham's identity and visitor economy and improve quality of life for residents
 25. Make it easier for event organizers to manage costs and receive permits for celebrations, festivals, and events within the city (e.g., at community parks)
 26. Consider hosting a Spark² or similar program to support new tourism product development initiatives.
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² Additional information on Spark programs is available at www.tourisminformation.ca.

Pillar #2 - Research and Investment Attraction

In its mission to become a leading DMO, DMC needs to ensure it has the data and business intelligence to make informed decisions. This strategic pillar area involves elements from both Data Research & Business Intelligence and Destination Information Resource in terms of the top 5 “ideal” roles for a DMO. The United Nations World Tourism Organization’s (UNWTO’s) 2021 *Guidelines for Institutional Strengthening of Destination Management Organizations* frames this well:

Responsible and sustainable destination management should entail a process that effectively and harmoniously addresses the interactions between the visitors, the industry that serves them, the community that hosts them and the environment in a broad sense (natural and cultural resources)³.

According to UNWTO, DMOs have a responsibility to bring together resources, expertise, and a degree of independence and objectivity to lead destination management for the greater community. DMOs connect the sometimes very isolated and occasionally diverging elements for the better planning and management of the destination; calling for a coalition of many organizations and interests working towards a common goal.

Fundamental DMO functions include gathering market intelligence (data gathering and analysis, market research, etc.), monitoring the industry, and fostering investments. **Destination Markham will act as the central source to collect data and to distribute market intelligence to the community, residents, and the government.**

A **Business Intelligence and Development Director** will lead initiatives under this pillar. The role will entail creating a strong research and data collection process to support Markham’s visitor economy. As one stakeholder suggested, “we need to start tracking visitation in every way possible so that we know how best to attract [visitors] and who our competitors are” (i.e. to understand the features of destinations that visitors choose as an alternative).

Furthermore, while collecting data and research is vital to tracking the impact on Markham’s economy and improvements made to the visitor experience, it is not the end goal. Data collection only serves a purpose if the data is put to use by:

- Ensuring the correct data is being tracked in order to measure performance across the Tourism Strategic Master Plan’s pillars and ensure alignment with Markham’s Economic Development strategic plan’s performance measures.
- Interpreting visitation trends (e.g., attraction attendance, popularity of new experiences, visitor demographics) and impacts for various stakeholders (e.g., businesses, Council, provincial government, residents, potential investors).
- Providing feedback to ongoing destination management efforts such as marketing campaigns, business and visitor satisfaction, and the economic impact of hosting major events.
- Informing future strategies and tactics (e.g., visitor friendliness training impact, marketing campaigns, investor attraction).

³ World Tourism Organization (2021), UNWTO Guidelines for Institutional Strengthening of Destination Management Organizations (DMOs)

Goals and Strategic Actions to achieve Goals for Pillar #2 – Research & Investment Attraction

Goal	Strategic Actions to Achieve Goals
To collect and analyze meaningful visitor data to support product development and marketing	<ol style="list-style-type: none"> 1. Establish a Business Intelligence & Development Director position, in line with strategic recommendations, and reallocate support roles accordingly, including database (CRM) management. 2. Develop a program to track visitation to Markham through: <ol style="list-style-type: none"> a. macro 3rd-party data b. industry-generated data (segmented by festivals/events, major business events in hotels, sporting events) 3. Work with partners to undertake annual visitor surveys to gain a qualitative understanding of visitors' perception of Markham's tourism offerings 4. Research existing events to determine which events attract the most visitation, revenue, and geographic dispersion and then determine the best approach to grow those events (in partnership with event venues and organizers). <ul style="list-style-type: none"> — Examples include significant sporting events that bring in out of town visitors staying overnight, or Taste of Asia and Night It Up! events which encourage repeat visitation to Markham. 5. Research and define interim solutions for transportation (e.g., potential vehicle routes, transit, etc.) and parking through collaboration with local businesses and City departments 6. Collect and use event data to educate decision-makers on the importance of large-scale sporting events, business events (conventions), and festivals in growing Markham's identity and visitor economy 7. Continue to partner with CCT to undertake visitor research and analysis 8. Collect and track tourism economic development statistics, in collaboration with external partners (like CCT), including: <ul style="list-style-type: none"> — New and enhanced investment into tourism assets and experiences, — The number of tourism-related businesses and the associated employment using the Tourism Asset Inventory, and — The economic impact of Markham's visitor economy by measuring visitor spending in Markham, the attributable GDP portion, and infrastructure associated with new/enhanced investments. 9. Contribute data regularly to the suite of information, data, and training resources to support tourism related businesses (see Pillar 1).

To broaden Markham's reach and renown as a destination

10. Broaden existing target markets by examining which attractions and activities will drive more visitation from young people (i.e., 18 to 34 years)
11. Identify niche visitor segments that align with Markham's key and distinct assets (e.g., competitive freestyle bikers, Olympic qualifiers for synchronized swimming and water polo, Hakka culture, cuisine enthusiasts, etc.)
12. Provide tourism awareness and education tools for residents, municipal agencies, and tourism stakeholders, so that they can all be ambassadors for Markham and effectively promote and support the destination
13. Research opportunities to grow Markham as a GTA destination for Provincial/regional conferences and sports tournaments (in line with Pillar 3)

To attract future tourism investment to Markham

14. Undertake a product-market match exercise and develop a strategy to address [gaps in infrastructure](#).
15. Create actionable investment attraction tools to support investment in Markham's tourism industry (e.g., up to date visitor statistics, available development sites, relevant policies, contact information of key people, gap analysis insights)

Pillar #3 - Product and Experience Development

Tourism product and experience development can be defined as the creation of new or enhanced and innovative products, experiences, and services for visitors to enjoy and the act of connecting stakeholders with those products and experiences. Product and experience development was identified as a **high priority** for Markham to develop a strong destination identity during the strategic planning process.

A senior leader is required to provide strategic direction to tourism operators and create a compelling destination.

Markham offers unique authentic Asian culture, cuisine, and shopping venues, but there is little collaboration between the individual businesses. There is also limited awareness outside of Markham of the rich tourism experiences available. Under this pillar Destination Markham will develop compelling experiences and itineraries to match visitors with tourism assets.

A compelling tourism experience consists of the core product (attraction, activity, etc.), the service before, during, and after the visit, the story of the place or people that make the experience memorable, and the narration or unique way that story is delivered. **Destination Markham can connect the dots for visitors and create a compelling story, building on its unique culinary, cultural, and shopping offerings.** Similar opportunities exist for incorporating Markham's charming and historic communities, such as Unionville and Markham Village, and key assets such as the Varley Art Gallery and Markham museum.

Tourism Experience Elements



Markham will leverage its reputation as a technology and corporate office hub to expand its meeting and event markets. Its location, in close proximity to downtown Toronto, the Pearson airport, and an abundance of national and international head offices make Markham an appealing location for corporate events. The unique after-business-hours experiences in Markham provide opportunities to expand the economic impact.

Similarly, the Markham Pan Am Centre and Joyride 150 have already established Markham as a desirable destination for sports tournaments and elite athletes. Destination Markham must now focus on expanding the visitor impact by increasing the number of visitors from outside the region and the duration of their visits. With the appropriate infrastructure, DMO support, and partner collaboration, sports tourism can be a significant component of Markham's visitor economy.

To truly compete as a destination for larger group events, Markham must have sufficient meeting space. **A feasibility study should be the first step in determining the need and potential impact of a multi-use facility to support Markham's sports, culture, and business group tourism markets.**

At the onset of the COVID-19 pandemic, many businesses were surprised to discover that their business relied on visitors. Destination Markham can play an important role in educating local businesses about the impact of visitors to their business and the local economy and the best ways to serve these visitors.

There is currently no comprehensive wayfinding strategy that connects visitors to Markham's many tourism assets and experiences. A wayfinding strategy that incorporates both hard assets (signage) and digital navigation (based on digital

maps and directions) will be instrumental in assisting visitors to find their way and experience the many related tourism assets that are dispersed throughout Markham. **Wayfinding systems have the added benefit of supporting the residents of the community and would be an ideal use of the City's portion of the MAT.**

The Rouge National Urban Park represents a key opportunity for visitors seeking a safe, active and healthy outdoor experience. Destination Markham can build upon this asset with an active transportation strategy that connects the park to wayfinding and transportation routes in the city. It will be important to work with the various cycling clubs, conservation authorities, related stakeholders and tourism related businesses to incorporate outdoor experiences into Markham's tourism offering.

The CBRE Team's tourism asset analysis indicates that the sports and recreation assets have the highest immediate potential for attracting visitors to Markham followed by retail centres and major festivals. All the tourism asset categories would benefit from enhancements to market readiness to meet the expectations of visitors to Markham. Many of the asset categories have the potential for off-season visitors which is a desirable attribute in a typically seasonal industry. Visitor duration could be expanded by greater use of itineraries, routes and experiences to include Markham's culinary, arts, culture and heritage and entertainment/recreation assets.

Markham's four core product and experience clusters are:

1. Sports Tourism
2. Retail Centres
3. Culinary & Dining
4. Hallmark Events and CME (Conferences, Meetings and Events)

A key role for Destination Markham will be ensuring tourism related businesses are market ready from training front line staff through developing digital excellence. Destination Markham can support the development of new products and experience by providing promotional and consulting support for operators who work collaboratively and create their own itineraries, offering incentives for new product development aligned with its core objectives and by identifying and leveraging the city's unique culture and experiences.

Goals and Strategic Actions to achieve Goals for Pillar #3 – Product & Experience Development

Goals	Strategic Actions to Achieve Goals
To identify and support major product & experience clusters for Markham	<ol style="list-style-type: none"> 1. Establish a Destination Development Director to oversee the development and enhancement of Markham's tourism assets and experiences 2. Create position(s) to support visitor-focused festivals and CME industry 3. Develop product offering and visitor appeal in four targeted product and experience clusters: <ol style="list-style-type: none"> a. Sports Tourism <ul style="list-style-type: none"> – Advocate for City funding to enhance city sports assets to support local sports activities and open Pan Am Centre for more visitor focused events – Work with Pan Am Centre to prioritize the attraction of national and international sports events – Establish a Sport Tourism task force with Recreation Services and Economic Development to work on attracting a targeted list of events, and examine opportunities for new and enhanced infrastructure to best grow the sport tourism cluster b. Retail Centres <ul style="list-style-type: none"> – Work with the primary retail centres in Markham in order to enhance events and visitor appeal, including: <ol style="list-style-type: none"> 1) Historic downtown of Unionville 2) Historic downtown of Markham Main Street 3) Pacific Mall 4) First Markham Place 5) Other evolving retail centres (e.g., Markville Mall) – Advocate for better wayfinding to centres, and provide orientation for visitors at the centres – Encourage operators to share data with DMC to better understand the visitor profile and key motivators – Work with operators to create digital assets and visitor-focused marketing – Support Economic Development's investment attraction efforts for tourism-related businesses in the primary retail centres

c. Culinary & Dining

- Using market intelligence, create experiences to position Markham as the Culinary Capital of Asian dining
- Build on Markham's strengths in Asian cuisine as a first step in creating awareness of Markham's visitor economy
- Educate restaurants on visitor friendliness (e.g. English menus, website development, etc.
- Work with Culinary Tourism Alliance to provide restaurants with the tools to develop targeted visitor experiences and materials for culinary itineraries
- Develop visitor itineraries that incorporate festival events, culinary and shopping

d. Hallmark Events and CME (Conferences, Meetings and Events)

- Focus on enhancing Taste of Asia, Unionville Festival, TD Markham Jazz Festival, Markham Music Festival as Hallmark Events for Markham
- Lead the attraction/development of a new hallmark event for Markham designed specifically for visitors
- Sponsor keynote speakers and performers at Markham's hallmark events through MAT funding, to elevate their appeal to visitors
- Encourage promotional support targeting external (visitor) markets
- Collect visitation and spend data at the events to inform business intelligence, event enhancements, and future marketing
- Advocate for investment in a multi-use event centre to be located in Downtown Markham
- Leverage the Flato Markham Theatre to support hallmark events and CME, including visitor packages

To establish a diverse mix of exciting and engaging tourism products and authentic experiences

4. Establish and maintain a tourism asset and experience inventory.
5. Identify the product, services, and stories that combine to create compelling tourism experiences.
6. Create itineraries for the four (4) targeted product & experience clusters that build upon the draw of Markham's existing unique culinary assets to increase length of stay (see Action #3)
 - a. Identify experiences aligned with Markham's key visitation drivers and visiting friends and relatives (VFR) demand
 - b. Incorporate Markham's outdoor assets and activities

To position Markham as a preferred destination for business, leisure and group events

7. Develop Markham's **conferences, meetings & events** product offering
 - a. Develop an inventory of business meeting venues, accommodations, and services (inclusive of parking and transportation access points)
 - b. Identify key target associations and organizations for Markham
 - c. Engage Markham's business community to host their events in Markham
8. Establish an advisory team to advocate for and support growth of sport tourism events and venue enhancements in Markham (see Action #3a)
 - a. Identify key opportunities, support bid development, develop supplementary itineraries, and support event sales and marketing materials (see Pillar 4, Action 11c)
 - b. Prioritize sports facilities as sport tourism assets in marketing campaigns
9. Collaborate with event-related partners to promote big festivals and events (e.g., Pan Am Centre, Markham Fairgrounds, TD Jazz Festival, etc.)
10. Support collaborative efforts between York University and the Markham Pan Am Centre to host larger, multi-venue events
11. Advocate for a portion of MAT revenues for bids on large-scale events in Markham (e.g., national/international conventions, sport tournaments, etc.)

To develop the hard and soft infrastructure to support Destination Markham's key visitor segments

12. Improve visitor wayfinding and navigation to establish Markham as a unified destination
 - a. Establish a digital base map that includes tourism assets, experiences, and nearby amenities
 - b. Develop a wayfinding strategy that connects itineraries, tourism asset clusters and related amenities.
 - c. Provide directions and tourism routes via digital maps to Markham's tourism assets, experiences, and itineraries.
 - d. Advocate for a portion of MAT revenues to implement the wayfinding strategy and fund destination-wide signage.
13. Expand the infrastructure needed to support the group and event markets as identified with Markham's Economic Development department, such as:
 - a. Creation of a Cultural and Visitor Hub in Downtown Markham
 - b. Conduct a pre-feasibility study / needs assessment for a multi-use event centre (e.g. for cultural, entertainment, sports, business events, conferences, and/or performing arts) in Downtown Markham
 - c. Conduct a pre-feasibility study / needs assessment for accommodations in the historic downtown retail centres (Unionville and Markham Village)
 - d. Advocate for a parking strategy to maximize the Pan Am Centre's potential as a sports tourism attractor

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14. Build upon Markham's outdoor and nature based experiences
 - a. Support the development of a municipal active transportation strategy for the City of Markham (in alignment with York Region)
 - b. Review partnerships with cycling clubs, conservation authorities, and businesses to provide access to more nature-based experiences (e.g., Rouge Valley National Urban Park, Milne Dam Conservation Park, etc.)
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Pillar #4 - Destination Marketing

Product development is the first step in effective tourism marketing. A destination needs to have products and experiences that resonate with residents and visitors before a DMO can effectively promote it through positioning statements, branding, marketing campaigns, and advertisements. There is a diverse range of offerings in Markham, and marketing campaigns that support them. Destination Markham would benefit from a more data-driven and unifying identity and brand platform to leverage these offerings.

Destination Markham needs to consolidate its positioning first by articulating a strong and unifying **corporate identity**. This identity will act as the business foundation for consistent messaging with residents, key stakeholders, partners, and target audiences. This is a critical step. A brand is not just a graphical element. It must be true to the organization's mission and vision. Destination Markham needs a brand strategy, including a brand character and positioning statement, that includes how the organization is perceived now, and how it should be perceived once strategic and marketing goals are met.

In addition to the corporate identity, it will be important to develop and launch an experiential consumer **visitor brand** that will be firmly supported by DMC's corporate identity and marketing efforts. The visitor brand will require its own brand and marketing strategy, which will be informed by a range of new and existing products and experiences, as well as related marketing assets for DMC. A future thinking approach to brand positioning should incorporate DMC's Vision and Mission.

By creating this unifying identity and brand platform, DMC will be able to operate on two specific levels:

1. Firmly establishing and communicating its corporate business efforts
2. Creating a true consumer visitor brand that will attract both day-trip and overnight visitors with appropriate tourism products and experiences

Distinguishing a personality that acknowledges and resonates with **all** target markets by being inclusive, will illustrate how the visitor economy and DMC initiatives impact people in a positive way.

Destination Markham has to this point utilized outsourcing for its marketing, which was appropriate in its initial phases. Moving forward, a **dedicated Marketing and Brand Management Director role is needed** to provide strategic direction for all marketing efforts. A marketing and communications specialist who really understands the goals and objectives of the organization, has a deep understanding of today's marketing tools and trends, and knows how to track and analyze all data and marketing campaigns, will give Destination Markham a distinct advantage.

A dedicated Marketing and Brand Management Director leading all marketing and communications strategies will provide decisive and strong leadership to both an internal marketing team, direct any external vendors to implement multiple targeted campaigns.

The **CBRE Team recommends managing marketing entirely in-house**. The Marketing and Brand Management Director will have an internal team including a Content Developer/Manager and Graphic Designer, producing and executing all strategies and campaigns. This team will bring the organization's goals and objectives to life. The team will be available to quickly respond to emerging opportunities, track campaigns and adapt and respond to challenges by changing messages or reassessing digital campaigns as the need arises. This in-house marketing team could be supported by independent specialists, such as photographers or web developers if required on a per campaign capacity basis.

As a first step DMC should establish a qualified Marketing & Brand Management Director to guide it through the initial strategic actions. These foundational elements have the potential to elevate DMC as the leading authority for destination management for Markham's visitor economy. Once the corporate DMC brand and visitor-facing brand are established, it will be crucial to aggressively market key tourism assets and experiences to reach broader markets. For example, Destination Markham and the Sport Tourism Advisory Task Force could develop a pitch document to promote sport tourism venues and attract more events to Markham.

Goals and Strategic Actions to achieve Goals for Pillar #4 – Destination Marketing

Goal	Strategic Actions to Achieve Goals
To build a unifying and credible corporate identity for DMC	<ol style="list-style-type: none"> 1. Establish the Marketing and Brand Management Director role, in line with strategic recommendations, to focus on development of both the corporate brand and the consumer visitor brand. 2. In line with best practices, establish Content Developer/Manager and Graphic Designer roles to build the foundation for an in house marketing department to support messaging, design and content for brand initiatives. 3. Develop a dedicated marketing strategy that supports DMC's mission 4. Position DMC as a leader - building all corporate materials to clearly communicate a simple statement that defines: who and what DMC is, why it exists, where it is physically located and how the organization benefits Markham's residents, businesses, and government 5. Build awareness of DMC and its features and benefits as an organization Internally (i.e., residents, businesses, and government) 6. Continue to develop the DMC Corporate Brand <ol style="list-style-type: none"> a. At a minimum, support the existing corporate graphic with a tagline that concisely and clearly explains DMC's "reason to be" (ideally 5 words in length) b. Create a corporate brand identity statement as the cornerstone of all future marketing materials 7. Work with appropriate strategic partners to grow awareness of DMC's identity
To create an appealing consumer visitor brand that heightens awareness of Markham as a unique tourism destination	<ol style="list-style-type: none"> 8. Align Markham's assets and experiences to the needs and wants of its visitor markets <ol style="list-style-type: none"> a. Establish specific value propositions for DMC's target audiences and ensure marketing campaigns are specific in their content, language, and benefits for each audience b. Review Markham's assets and experiences in relation to historic visitation, as detailed in the Phase 1: Background Review & Initial Findings Report 9. Undertake a visitor branding exercise for DMC <ol style="list-style-type: none"> a. Build a dynamic and memorable personality for DMC's visitor brand as both a day-trip and overnight destination, that is both appealing and approachable b. Create a unique and engaging logo and tagline for the Markham's visitor brand

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- c. Create specific and focused awareness campaigns that reflect and support the new visitor brand as dynamic and memorable
 - 10. Work with appropriate strategic partners to grow awareness of the new visitor brand identity and excitement
 - 11. Aggressively market key existing tourism assets and experiences for wider recognition, promoting;
 - a. New product and experience itineraries
 - b. Culinary establishments, products, and experiences
 - c. Sport tourism – including development of a pitch document (in partnership with the City Recreation Services and Economic Development)
 - d. Event and festival venues and experiences
 - e. Meeting and conference venues and related tourism experiences
 - f. Group travel experiences
 - g. Major events taking place within Markham
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Measuring Success

Implementation Plan

As part of the planning process, the CBRE Team has also assisted Destination Markham in determining how best to measure the successful implementation of the Tourism Strategic Master Plan. A detailed Implementation Plan was established for Destination Markham’s internal use.

For each of the 66 Strategic Actions identified, the Implementation Plan details key partners, time frame (immediate, short, medium, long term and ongoing), priority (critical, high and medium) and the estimated budget where appropriate.

The CBRE Team identified 17 strategic actions for Destination Markham to implement within the first 6 months in order to set the foundation for Destination Markham’s broader mandate that includes strategic coordination and management of Markham as a destination.

Performance Measures

The Implementation Plan also provides the basis for measuring performance. **Performance measures** link the individual actions in the implementation plan to specific outputs that lead to desired outcomes. The performance measurement framework links the individual actions in the implementation plan to specific outputs that lead to desired outcomes.

The four elements of the performance measurement framework are inputs, actions, outputs and outcomes.

Inputs	Actions	Outputs	Outcomes
Human, financial, organizational and community resources required to implement the strategy	Specific activities undertaken using the inputs to further the strategy	The results of the actions. For example, # of tourism operators at a digital marketing workshop	Broader longer-term impacts on the visitor economy and community as a whole arising from the implementation of the strategy



As Destination Markham begins the implementation process, the majority of measurement work will be focused on inputs and actions, on the left side of the spectrum; ensuring the organization has the necessary resources to implement the strategy and has begun work to implement the recommended actions. As the organization matures it will be appropriate to measure the outputs, the result of the actions and ultimately the outcomes including changes in the number of visitors coming to Markham and the economic impact of the visitor economy.

Measurements to track by the end of the first year of the three-year Tourism Strategic Master Plan include, but are not limited to, the following:

Full time Executive Director role established and filled	Input
Total MAT funds available to Destination Markham for strategic initiatives	Input
Destination Markham initiatives aligned with strategic pillars	Action
Year 1 Business Intelligence Action Plan and tactics prepared	Action
Number of operators engaging with Destination Markham on a regular basis	Output
Number of overnight visitors staying at local hotels	Outcome

Destination Markham's success will be visible when the broad outcomes of performance measurements are directly tied its overall mission: **to be the leading authority for destination management, advancing Markham's visitor economy with the support of its residents, businesses and government.**

Appendix A – Glossary of Industry Terms

Tourism

According to Statistics Canada, tourism is defined as: "the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited." It includes travel for business, leisure and other personal reasons, such as visiting friends and relatives, religious purposes, or medical treatment. The term "usual environment" is defined as the place where an individual lives and works, or studies, and includes any other places frequented. Canada has defined the concept of "outside the usual environment" as greater than 80 kilometres one way from home. Crossing an international or provincial border, is considered tourism no matter the distance travelled.

Tourist/Visitor

In Canada, the term "tourist" is used to denote all visitors, whether they are same-day or overnight visitors. As such, the two are used interchangeably in this Strategy.

Community vs. Tourism Events

The term "event" is used to describe a wide range of activities. Events vary from local community-based events (e.g. Folk Festivals) to major events (e.g. The Olympics). Events help to capture attention and promote attractions and infrastructure in smaller communities. Community events and festivals can attract tourists and visitors at regional, provincial, national and international levels, but need to be promoted beyond the community in order to do so. A "tourism" event is an event that brings people from outside their usual environment to a place. The following list distinguishing events that typically draw tourism demand and revenue sources:

Tourism Event Types				
Event Type	Time Frame	Tourist Demand	Value	Example
Mega Events	Occasional	High	High	Olympics Pan American Games World Fairs
Hallmark Events	Recurring	High	High	Mardi Gras, New Orleans Calgary Stampede Oktoberfest, Munich
Regional Tourism Events	Recurring & One-Time	Medium	Medium	Regional Sport Tournament Large Music Festivals
Local Events	Recurring & One-Time	Low	Low	Local celebrations (Canada Day) Barbeques, Local Fairs

Source: D. Getz, 1997, 2005, 2008

Tourism Asset/Product

According to the UNWTO, a Tourism product is “a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific center of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers.

Tourism-Related Experience

A tourism-related experience is a set of activities in which individuals engage in while travelling for tourism purposes. Each tourist builds his or her own tourism-related experiences that satisfy a wide range of needs and interests, from pleasure to a search for meaning. A tourism-related experience typically involves events, activities and interactions that people engage in outside their permanent residence with organizations, environments, and other people, that enable them to create, develop and enjoy personal narrative and memories.⁴

⁴ IGI-Global, “Experience Economy Domains in Tourism: Extending the Knowledge and Understanding of Experiences”

Thank you

For more information

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