



Economic Impact of Tourism Development  
Associated with Marmora Pumped Storage

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Final Report

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Prepared by A-Frame Content & Marketing



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# Executive Summary

**A unique opportunity for reinvention: the site of the former Marmoraton mine is ideally suited to host the largest electricity storage facility in Canada and reinvigorate tourism in Eastern Ontario.**

## Background

The Marmoraton Mining Company Limited, a subsidiary of Bethlehem Steel Corporation, began mining the site one kilometre southeast of the village of Marmora in 1950, after an aerial geological survey conducted by the Government of Canada uncovered a 20-million-ton iron deposit. The mine and plant employed 300 workers at its height. Bethlehem Steel closed the mine in 1978 due to decreased demand for iron ore, leaving behind an open pit mine and 70 million tonnes of waste rock. Though there was warning of the closure, few formal arrangements were made until the final termination of operations; at the mine's closing, 250 jobs were lost and no reclamation plan was put in place.

Northland Power's proposal to construct a 400 megawatt pumped storage facility on the site of Marmora's former open-pit iron mine is a **\$750 million private sector investment** for electricity system infrastructure that has the potential to turn the site into a major electricity system asset and economic development engine for Eastern Ontario. This is an opportunity to turn a derelict mine into an asset that caters to tourists while beautifying an otherwise under-utilized property. Northland's plan also makes use of existing manmade infrastructure and as a result it is cheaper than wind, solar and natural gas-fired power (and without the emissions).

## The Economic Impact of Tourism Development Associated with Marmora Pumped Storage Report

The Marmora pumped storage site is the first energy facility of its kind in Canada to be hosted on the site of a former open pit mine and the first to incorporate tourism infrastructure as a draw. This report, the Economic Impact of Tourism Development Associated with Marmora Pumped Storage, provides a high-level blueprint for the development of the site and allows the community to begin building its tourism brand right away. Highlights of the report's findings include:

Marmora & Lake's assets include easy access to nature and outdoor activities, numerous historical and natural attractions, a mix of seasonal and year-round residents, and direct highway access. The increase in tourism once the site is fully developed will generate over \$32 million in annual tourism-related spending, including \$6.7 million in federal taxes, \$5.4 million in provincial taxes, \$69,000 in municipal taxes and over \$15.5 million in total labour income within Regional Tourism Organization (RTO) 11.

### Visitors

The mine's natural beauty already attracts visitors, and further development and beautification of the site would help to draw tens of thousands of visitors annually (similar to other pumped storage sites around the world); one geographically comparable pumped storage site attracts over 200,000 visitors annually.



Pumped storage facilities around the world have developed highly successful tourism programs.

The proposed site in Marmora is expected to attract over a quarter million visitors every year following the completion of the Tier Three recommendations.

## Jobs

The pumped storage facility and associated tourism assets will add 381 jobs to Hastings County, the majority of them in Marmora & Lake – more jobs than when the mine was operational – and potentially increase total wages earned by Marmora & Lake residents by 15–20%. An increase in jobs will also grow local spending and boost tax revenue.

**“The Marmora Pumped Storage Hydro project is an innovative way to build on the massive man-made infrastructure that would otherwise sit dormant. Converting a closed mine into a value-added energy asset and platform for economic development can be a boon for this rural community and the region as a whole.”**

~ **Jeff Leal**, Minister of Agriculture, Food and Rural Affairs

Source: [www.MarmoraandLake.ca](http://www.MarmoraandLake.ca), Ontario's Ministers of Energy and Rural Affairs visit Marmora Pumped Storage Hydro Site

## Location

Situated midway between Toronto and Ottawa, the site location is the perfect stopping point for travellers visiting Ontario. The Highway 7 and 401 corridors will provide direct access to a facility with spectacular views of a manmade geological site. Surrounded by natural wetlands and forest, this landmark-in-the-making is ideal for all-season outdoor activity. Minutes away you will find the town centre of Marmora & Lake and its principal waterways, the Crowe River and Crowe Lake. The site is also close to transmission (only 8 kilometres away) with ample capacity to handle the 400-megawatt output and is easily accessible for employees, equipment and supplies.







The facility's highest points of elevation provide spectacular panoramic views of the mine, which is 4 times the drop of Niagara Falls. The perimeter of the mine is 5 times the length of the Canadian Horseshoe Falls.

## Media Coverage

There has been impressive media attention from across the country, with four of Canada's leading news agencies reporting on the project.

- **Globe and Mail** – Report on Business – February 20, 2013  
The project made the front page of the business section in a story by Shawn McCarthy, the Globe's national energy writer. <http://goo.gl/3I21Jx>
- **CBC Radio** – Ontario Morning – February 21, 2013  
CBC Radio picked up on the Globe and Mail story and aired a 7-minute interview. <http://goo.gl/tIOYAA>
- **Maclean's Magazine** – June 2013 edition  
Included the Marmora Pumped Storage in a piece highlighting major energy innovations being developed in Canada and abroad. <http://goo.gl/9VkVgM>
- **Canadian Mining Journal** – The May 2013 Edition  
Carried a well written story about the project. <http://goo.gl/DU03au>
- **Bing Home Page** – January 17 and 18, 2014  
A picture of the site was viewed by millions over the course of two days in January 2014.

## Recommendations

The construction of Northland Power's pumped storage facility and the site's development by the municipality into a tourist destination is an incredible opportunity to boost Marmora & Lake's economic growth. The facility is poised to become the Niagara Falls of Eastern Ontario. This can be achieved with a focused implementation process:

**Tier One recommendations** include the first steps that need to be taken towards site development, as well as lower-cost initiatives, some of which can be started before construction begins.

- Mapping out a multi-use trail system
- Providing rest area facilities for the duration of construction and information on the project's progress
- Establishing the location of larger tourism infrastructure projects in relation to the pumped storage facilities

**Tier Two recommendations** build on Tier One recommendations and focus on the site's primary tourism infrastructure projects.

- Establishing a campground and recreational facility at Mud Lake
- Establishing a visitor centre
- Building educational opportunities

**Tier Three recommendations** build on Tier Two recommendations, with projects that may be best undertaken once the majority of pumped storage construction is complete, and also offer options for future blockbuster projects.

- Further trail development that will allow for fossil viewing
- Landscaping and/or botanical gardens
- Adding outdoor adventure with a zip-line and expanding the campground facilities at Mud Lake
- Establishing a national mining museum on the site

Note: Estimates based on data supplied by the National Household Survey (NHS), Ontario's Tourism Regional Economic Impact Model and the number of visitors at other pumped storage sites; economic assumptions estimate the number of visitors based on the visitor origin ratios from the Ministry of Tourism, Culture's 2011 visitor data for RTO 11.



# Introduction

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The pumped storage facility proposed by Northland Power for the former site of the Marmoraton Mine has the potential to significantly boost tourism and economic growth.

The Municipality of Marmora & Lake has requisitioned a plan to explore the development of tourism assets that may be implemented to complement the Marmora pumped storage project. This plan will also explore the potential economic impact these assets may bring to Marmora & Lake, Hastings County and the Province of Ontario. The Economic Impact of Tourism Development Associated with Marmora Pumped Storage report provides a roadmap of potential tourism investments and suggestions for implementation both before and once the Marmora pumped storage project has been approved.

The consultation process has engaged community stakeholders, local educational institutions and other industry specialists, and we have taken into consideration other regional and provincial tourism plans. This is Marmora & Lake's opportunity to develop and grow a lively and sustainable tourist attraction centred around the pumped storage facility.



We have suggested a brand for the tourism portion of this plan to better capture the attention of and generate excitement within the community. The Recharge Marmora Tourism Plan allows us to tie together the unique character of the pumped storage facility, through use of the word "recharge", and a call to action for the community. Together we will recharge Marmora & Lake with exciting new possibilities that will encourage active living, tourism and growth.

Leveraging and synthesizing data is key to establishing baselines against which to measure expected performance and project future growth. Compiled by undertaking a thorough review of existing tourism environments at the municipal, county, regional and provincial levels, collecting data from an inclusive group of stakeholders and interviewing other pumped storage facilities around the world, this report shapes a realistic and achievable plan that can begin even before ground breaks on the pumped storage site.

## **Pumped Storage Facilities:**

- Electric Mountain, U.K.
- Bath County Power Station, U.S.A.
- Tennessee Valley Authority/Raccoon Mountain, U.S.A.

## **Primary Stakeholders:**

- Eastern Ontario Trails Alliance
- Crowe Lake Waterway Association
- Ontario Highlands Tourism
- Bay of Quinte Tourism
- Hastings County Tourism
- Municipality of Marmora & Lake
- Marmora & Lake Economic Committee
- Business Owners of Marmora & Lake
- Ministry of Tourism, Sport and Culture
- Hastings County Wellness

There are many paths to the same finish line. Recognizing that a plan that produces long-term growth will need to have a solid implementation strategy, our suggestions are organized into tiers. The recommendations in this plan allow for short-, medium- and long-term development that can evolve as funding becomes available and infrastructure demands grow. Groundwork needs to be laid now in order to ensure stability for the community during times of change.

Strong, sustainable assets are the key to future growth and development. The estimates presented in this report, established using Ontario's Tourism Regional Economic Impact Model (TREIM), are conservative, but still demonstrate that the project will be an incredible asset to the area, will have trickle-down effects to surrounding communities and the province, and will be an excellent return on investment spending.

The final Economic Impact of Tourism Development Associated with Marmora Pumped Storage report provides a concrete framework for tourism asset development in the municipality of Marmora & Lake related to Northland Power's proposed pumped storage project. The plan takes a coordinated and holistic view of the area's destination tourism potential and suggests opportunities for a range of development to encourage organic and sustainable growth.



**“This is quite a piece of landscape, not only for the potential of hydro generation, but generally it’s very impressive. The project itself is an excellent concept.”**

~ **Bob Chiarelli**, Minister of Energy

Source: [www.MarmoraandLake.ca](http://www.MarmoraandLake.ca),

[Ontario's Ministers of Energy and Rural Affairs visit Marmora Pumped Storage Hydro Site](#)

# Background

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The goal of this plan is to leverage both regional and site-specific assets in order to create a lively and sustainable tourist attraction that is centred on the pumped storage facility. The methodology used to create this report included:

1. Conducting an assessment of opportunities for the Marmora pumped storage site through extensive research into existing pumped storage facilities, provincial statistics and other regional tourism plans (more detailed research is available in Appendix D: Pumped Storage Facility Site-specific Learnings).
2. Stakeholder engagement through surveys, interviews and meetings.
3. Tourism asset development recommendations developed in response to data collected in 1 and 2 above, and including:
  - a. Determining the logistics of a visitor centre to highlight pumped storage and recreational geology/mining of the area.
  - b. Identifying interpretive areas at the Marmora pumped storage site.
  - c. Identifying recreational opportunities.
4. Potential economic impact on region using the TREIM tool.

A wide range of interested individuals, businesses and organizations were interviewed in an effort to be as inclusive as possible. The goal of the interviews conducted for this report was to foster dialogue to determine the social and environmental issues that matter most to stakeholders, and to determine which recommendations will best meet those goals and address any issues that might arise.

It is important to note that there was no negative feedback received from any stakeholder concerning the opportunity for tourism asset development related to pumped storage. In fact, many locals are looking forward to the potential benefits (increased customer traffic, investment and spending) that such a large-scale development might bring.

# Context For Recommendations

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Existing data and interviews with representatives of other pumped storage facilities, combined with an analysis of tourism trends, illuminated many of the opportunities and challenges facing the Marmora pumped storage project. Research results and a limited analysis are outlined below. In brief, Marmora & Lake is well-positioned for large-scale, year-round tourism development: the population grows with seasonal residents in the summer, it is a relatively popular retirement community and it has been able to host a successful winter festival for the past 36 years. Its proximity to well-travelled and well-maintained highways (as of 2010, the village of Marmora saw annual daily traffic volume of 5,300 vehicles along Highway 7) make it an accessible location for a wide variety of travellers.

## 1. Local Context

Marmora & Lake is a municipality in Hastings County, Ontario, (the estimated population in 2011 was 4074 and the median age was 50.9) located midway between Ottawa and Toronto, about 30 minutes north of the 401. The largest village, Marmora, is located along Highway 7, a major transportation route for trucks and vehicles travelling to and through those destinations. The village of Marmora is surrounded by the Crowe River, Crowe Lake and Beaver Creek, and the municipality has a rich history and offers exceptional access to boating and trails.

Marmora & Lake's assets include easy access to nature and outdoor activities, numerous historical and natural attractions, a mix of seasonal and year-round residents, and direct highway access, while its challenges include an aging population, small tax base, difficulty attracting a broad range of businesses and the need to encourage more than day-trip tourism.

Looking at the area's key opportunities and challenges in the context of the pumped storage development allowed us to position the recommendations optimally within the tourism market and existing municipal, regional and provincial economic growth and tourism plans.

### Local Tourism Opportunities

- The proposed site for the pumped storage facility is completely unique and cannot easily be replicated elsewhere:
  - » For pumped storage: the lower reservoir is already in place, space exists for the upper reservoir, and the site offers proximity to a major hydro corridor
  - » For tourism: the site offers proximity to existing trails, Mud Lake, and a number of highways
- Access is strong:
  - » Public entrance to the site will be located on Highway 7
  - » Site is an easy driving distance between Ottawa/Toronto (2 to 2.5 hours)
  - » Site is 30 minutes from 401 at Belleville
  - » The Highway 407 extension to Highway 35/115 is underway and will offer improved access from Toronto
- Marmora & Lake council is supportive
- Community is supportive
- Lots of natural attractions to build on, including nature, geology, a rich mining history and ample outdoor recreation
- Perfect destination for trail development within the Eastern Ontario Trails Alliance (EOTA) system
- Pumped storage plant and tourism will create jobs in an area with low household incomes

- Economic growth through increased local tax base
- Tourism growth resulting in more visitors/more visitor spending
- Increased jobs/services/activities/infrastructure for locals
- Opportunity to attract other investors and/or projects to municipality and region

## **Local Tourism Challenges**

- Purchase agreement for electricity is not yet in place
- Funding for capital projects is not secure
- Long and uncertain timeline for completion means that if the project takes too long to be approved/roll out, early investors may not be able to sustain businesses and services
- Lack of living space and infrastructure to support workers at start of project
- Lack of accommodations for tourists during early stages of development
- Outdoor activities earn less tourism revenue per visitor than many other forms of tourism
- Reliant on strong public/private partnerships

## **2. Regional Context**

Marmora & Lake is fortunate to be located within the boundaries of a number of tourism organizations. Hastings County officially became part of the Bay of Quinte Tourism region early this year; the Ontario Highlands Tourism Organization (OHTO) includes the village of Marmora in their Comfort Country region (which also includes Madoc, Stirling and Tweed); and Hastings County Opportunities in Tourism (HOT) is a well-established organization focused on developing tourism assets, collaborating on tourism marketing and promotion, and coordinating ways to enhance and improve the tourism appeal for all communities in the county. All of these groups have robust websites, marketing plans and community engagement strategies that currently benefit the municipality of Marmora & Lake.

### **Regional Tourism Opportunities**

It is important to present cohesive tourism products that are easily marketable to the public. By focusing on geology and history, the pumped storage project, Marmora & Lake, Hastings County and the Ontario Highlands can all capitalize on creating unique visitor experiences:

#### **Geology**

- Recreational geology brochure produced by the OHTO includes Marmora & Lake sites
- Region has some of the most diverse geology in the world
- Geology has shaped how our communities developed
- Could be developed into a significant regional theme

#### **History**

- The village of Marmora can celebrate that it is Upper Canada's first iron town
- Provide information about the settling of the area, which is one of Ontario's oldest region (e.g., St. Mathilda's, one of the oldest Catholic churches in Upper Canada's interior)
- Leverage its past as a logging centre
- Highlight cultural history with further festivals and activities like SnoFest or PurdyFest
- Touring (motorcycling, snowmobiling, driving, etc.) on roads and trails is this region's biggest asset

## Regional Tourism Challenges

The OHTO has identified a number of challenges faced by the region. Finding information and statistics for communities is difficult, and the area often has to rely on provincial- or county-level measures rather than location-specific data. This is largely due to the lack of resources for tourism in the region and a poor response rate to the National Household Survey (the census). Given this, very little analysis exists on the potential growth of the area. This makes the work of connecting with and surveying local residents and businesses all the more vital, as anecdotal evidence can become important benchmarks against which growth can be measured.

- Nature is the region's greatest consumer product. However, nature lovers typically do not contribute greatly to tourism spending.
- Over 70% of visitors to the region fall into the VFR (visiting friends and family) category. This group also tends to spend little. Accommodation and food are where many municipalities benefit primarily from tourism, which for VFR visitors are often supplied by hosts.
- The region currently suffers from a lack of demand for accommodation. Many accommodation establishments in the OHTO region are small, family-run businesses that see an average vacancy rate of 50%. Unfortunately, without demand it is hard to invest in this product, and until we invest in the product it is unlikely we will see an increase in demand.
- Many of the region's communities have no purchasable product, which is why it is so important to focus on offering fulfilling visitor experiences. With many small businesses working with limited budgets that deliver little impact for marketing dollars, marketing partnerships are a way for the region as a whole to share a unified approach, elevating the tourism experience for the entire area. Examples include:
  - » Bay of Quinte Region's Cheddar and Ale Trail  
<http://tourism.bayofquinte.ca/things-to-do/food-and-drink/our-cheddar-ale-trail/>
  - » Ontario's Highlands recreational geology (<http://ontarioshighlands.ca/things-to-do/geology/>) and motorcycling (<http://ontarioshighlands.ca/things-to-do/motorsports/motorcycling/>) initiatives

## 3. Pumped Storage Context

Interviews were conducted with representatives at pumped storage sites in the United States and Europe to better understand how other power generation stations combine tourist attractions and operational power facilities, what type of tourist attractions they offer, and best practices and advice for operating similar facilities. More detailed information on each interview can be found in Appendix D: Pumped Storage Facility Site-specific Learnings.

As a result of these conversations, it is recommended that Marmora & Lake's work in establishing tourism in relation to the pumped storage project:

- Engages local organizations like the Eastern Ontario Trail Alliance and the Crowe Valley Conservation Authority for development and marketing
- Actively works with school boards to offer field trips and other learning opportunities
- Develops focused tourism attractions that are managed by dedicated staff
- Leverages the strengths of locals to better develop the area's tourism-related businesses and infrastructure in addition to pumped storage-specific tourist draws



Listed below are the key interview takeaways by topic:

## Facilities

- The following features are present at one or more of the interviewed sites:
  - » Explanation of how the pumped storage facility works
  - » Models of the power facility
  - » Educational or historical videos
  - » Static informational displays
  - » Explanation of the site's history
  - » Interactive maps or exhibits
  - » Community impact statement, including lists of organizations involved in the tourism or pumped storage facilities
  - » Gift shop
  - » Café
  - » Community centre and meeting rooms
  - » Tourism flyers for other attractions in the area
- Most sites were organized around a visitor centre.
- Admission to the visitor centres was always free, with paid access to tours.
- Each site offered a number of outdoor facilities, such as picnic areas, multi-use trails, hiking, fishing, swimming and camping.
- The sites were generally owned and operated by the power generation companies, though individual aspects were sometimes shared with a government agency, like the visitor centre at Electric Mountain, or contracted to private businesses, like the café at Electric Mountain or campsites at Tennessee Valley Authority (TVA).

## Visitors and Tours

- The number of visitors ranged widely from one site to the next. However, there appears to be a correlation between the size and vibrancy of the visitor centre and the number of visitors. There also seems to be a strong preference for drop-in visits: the Bath County facility was the only one to require booking in advance and it attracted fewer than 1000 visitors a year.
- Electric Mountain and the Tennessee Valley Authority (TVA) both recognized that much of their popularity is due to nearby outdoor activities, such as hiking, cycling and camping.
- Every person interviewed agreed that there are a number of security concerns about visitors interacting directly with the power facility and that this affected how tours were structured.
- Some locations conducted heavily monitored tours of part of the facility while others only offered videos, informational displays and/or re-creations of a section of the power facility.

## Staffing

- Interviews also revealed that it is important to have at least one staff member dedicated to operating any tourism facilities. This person should be enthusiastic about offering a strong tourism experience.
- Splitting staff time between tourism and non-tourism responsibilities will hinder their ability to provide tourists with a memorable experience.

- Local volunteers can provide a strong supplement to paid staff and help reduce the overall cost of labour at tourism facilities. Allowing locals to volunteer will also encourage a sense of ownership and pride in the community and may help engage an aging population.
- Volunteers may be able to coordinate fundraising activities to help finance the maintenance or expansion of tourism assets.
- The TVA's pumped storage visitor centres are staffed predominantly by volunteers. A representative from the TVA noted that while volunteers are enthusiastic and cost-effective, there are also drawbacks to relying heavily on volunteers, including their unreliability and potential lack of specialized skills.

### **Advertising and Marketing**

- It is possible to attract a large number of tourists without a large advertising budget. The majority of sites interviewed made brochures and other printed materials available at other regional tourism hubs but often did little else to advertise the site's tourism experiences.
- Occasional news pieces and word of mouth drove large numbers of visitors to sites.
- Partnering with regional tourism organizations was seen as having a strong source of referrals for Electric Mountain.
- Most sites expressed a desire to do more advertising and believed it would help attract more visitors. Small advertising budgets, lack of time/expertise, and a lack of motivation due to contentment with the number of visitors were offered as reasons more advertising wasn't pursued.

### **Other notes**

- A common theme is the need for partnerships with local organizations that can refer visitors and also help to improve tourism assets. One example: the Tennessee Valley Authority worked with regional mountain biking groups to build and maintain multi-use trails and encourage cyclists to visit TVA visitor centres.
- A supportive local community was also noted by several sites. Electric Mountain is able to attract so many visitors in part because the nearby municipality has eagerly embraced tourism opportunities, and local businesses effectively cater to the numerous visitors. Overall, this has created a more favourable experience for visitors and leads to more word-of-mouth referrals and repeat visits to both the pumped storage facility and the municipality.
- The Marmora pumped storage site developments recommended later in this plan highlight the best developments at other pumped storage facilities: Raccoon Mountain (TVA) has a well developed outdoor trail network and a functional but relatively modest visitor centre, while Electric Mountain provides a robust, well-staffed visitor centre that focuses on education and a well-developed set of outdoor experiences.

## Introduction

Tourism generates significant economic stimulus and growth by encouraging local consumption of goods and experiences. As Ontario's economy continues to shift away from manufacturing and resource-based industries, attracting a desirable visitor base in order to grow dependable tourism industries is a viable means of economic improvement for smaller municipalities.

## 1. Marmora & Lake Visitation Characteristics and Trends

It is difficult to provide a complete picture of the current state of tourism in Marmora & Lake; as with many other municipalities in Ontario, comprehensive local data is not available. Many of the different studies used to compile these initial findings cover slightly different regions, such as Hastings County or Ontario Regional Tourism Zone 11 (RTO 11, which includes the area from the Haliburton Highlands to the Ottawa Valley). As a result, most of the data presented in this report has been collected on a regional/county basis. Additionally, in many cases the most recent data available is several years old. For a list of the Marmora & Lake's current tourism offerings see Appendix E: Snapshot of Current Marmora Tourism Assets.

### Demographics

In 2011, the largest demographic to visit RTO 11 was the 15-24-year-old age bracket (1,109,800 visitors), followed closely by visitors 35-44 years old (1,040,400) and 25-34 years old (999,100). The least frequent visitors were those ages 65+. Further, of the 3,931,500 total household/party visits, 84% of them consisted entirely of adults.<sup>6</sup> This suggests that while it is important to develop child-friendly tourism components, it would be a mistake to focus primarily on those developments.

In terms of visitor origins, 94% of visitors to the region came from within Ontario.<sup>6</sup> This indicates room for improvement in attracting visitors from other areas. The pumped storage site will be the first site of its kind in Canada to use a re-purposed mine and enable tourism; thus it may be particularly appealing to Canadian tourists originating from outside of Ontario.

### Attractors

Current tourists visit the county for outdoor experiences, rocks and minerals, art, culture and heritage and picturesque villages.<sup>1</sup> Meanwhile, outdoor experiences appear to be the chief tourism draw of existing pumped storage projects elsewhere in North America, and popular tourist attractions at other pumped storage projects include bird nesting boxes, multi-use trails, observation points, camping and tourist centres. Given this, the initial development initiatives at the Marmora pumped storage site should focus on creating outdoor tourism assets.

Shopping and entertainment offerings in the region are significantly underdeveloped. That only 141,900 of the visits to RTO 11 were primarily for shopping (2.5% of the total visits)<sup>6</sup> emphasizes the lack of available shopping and entertainment attractions, and many seasonal residents have said they would like to have access to more local retail options.<sup>5</sup>

### Sources of Local Information

Close to 58% of visitors found out about county tourist destinations by word of mouth, followed by 20% who live within the area and thus already know about them, and 17% who used the internet.<sup>2</sup>

Informal sources such as cottage association newsletters (62.8%) and friends and family (51.3%) are the most popular for obtaining local information. In comparison, visitors guides (11.5%), websites (10.3%) and social media (10.3%) are infrequently used as sources of information.<sup>3</sup> This means it is especially important

for Marmora & Lake to focus on providing a notable experience to visitors and then staying top-of-mind after a visit to encourage word-of-mouth advertising through marketing strategies.

## Accommodations and Length of Stay

The vast majority of visitors listed the primary purpose of their travel to the region as pleasure or visiting friends/relatives (VFR). Of 6,419,100 total nights (which counts each day trip as 1 night), 3,753,000 visited for pleasure and 2,480,800 visited to VFR.<sup>6</sup> Because word of mouth is such a strong tourism driver in the area, engaging area residents and other tourism site operators will be an important part of attracting visitors.

The most frequent length of stay in the region was day trips (3,283,200). The next most frequent were 2-night visits (967,500) and 1-night visits (731,300).<sup>6</sup>

Visitors spend much less on day trips than overnight trips. Currently, the village of Marmora has only 21 rooms available (not counting private rentals, Airbnb listings, or the proposed development on Cook Road), and types of available accommodations include bed and breakfasts, motels, campgrounds and trailer parks. Offering a wider range of accommodation types might attract a wider range of visitors.

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1 The Hastings County Premier-Ranked Tourist Destinations study

2 2012 Hasting County Tourism Review

3 Seasonal Residents Survey for North and South Hastings 2013

4 The review notes that "From 2011 to 2012, roughly the same number of visitors provided comments in relation to the number of surveys received (about 35%)."

5 Seasonal Residents Survey for North and South Hastings 2013

6 Ministry of Tourism, Culture and Sport's Regional Tourism Profiles

## 2. Economic Impact

As the Marmora pumped storage project will be the first of its kind in Canada designed to encourage tourism, modelling and prediction is difficult; the proposed site plan presented in this report is more ambitious in its tourism scope of offerings than the tourism offerings of the other pumped storage sites interviewed here. Additionally, the Marmora site has the added benefit of being less remote than the sites located at Raccoon Mountain (TVA) and Electric Mountain. This report therefore assumes greater visitor numbers than those reported by either of these facilities.

Based on the TREIM tool, the increase in tourism once the site is fully developed will generate over \$32 million in annual tourism-related spending, including \$6.7 million in federal taxes, \$5.4 million in provincial taxes, \$69,000 in municipal taxes and over \$15.5 million in total labour income within RTO 11. It will also add 381 jobs to Hastings County, the majority of them in Marmora & Lake – more jobs than when the mine was operational – and potentially increase total wages earned by Marmora & Lake residents by 15–20%.

Estimates based on data supplied by the National Household Survey (NHS), Ontario's Tourism Regional Economic Impact Model and the number of visitors at other pumped storage sites; economic assumptions estimate the number of visitors based on the visitor origin ratios from the Ministry of Tourism, Culture's 2011 visitor data for RTO 11.

## 3. The Connected Explorer

In an effort to identify and understand the types of visitors with the best potential to support tourism growth in Ontario, the OHTO partnered with the provincial RTOs and the Ontario Tourism Marketing Partnership Corporation to complete an extensive study of consumer segments. They determined that the segment with the most potential for growth is the [Connected Explorer](#):

“The Connected Explorer has a psychological need to take a break from the everyday. They are a confident, youthful, optimistic group. They have a deep-seated need to travel and expose themselves to many new experiences and learning opportunities. Travel for them is about expanding their horizons and escaping the everyday.”

This Connected Explorer profile aligns with the demographics (outlined above) most likely to visit Marmora & Lake: they are young adults, have disposable income and prefer to engage with nature and new experiences through outdoor adventure, nature sightseeing, touring and attending festivals and events. Developing the land around the pumped storage site and building more experiences that are tailored to this audience, and marketing them accordingly, will increase the number of Connected Explorers Marmora & Lake is able to attract.

## 4. Development Direction

The Marmora pumped storage site offers excellent development potential for both tourism and local business opportunities. Based on current offerings located in Marmora & Lake and the property’s unique attributes, we believe the opportunity exists to better attract and cater to two existing communities:

- Sport and Adventure
  - » Increasing the trail systems, especially looped trails, on the property is a natural and cost-effective opportunity to allow for a number of outdoor activities, and local sports equipment rental has been identified by a number of stakeholders as a very important offering.
- Travellers
  - » We need to give people a reason to stop in Marmora & Lake as they travel along Highway 7 or the Hastings Heritage Trail, whether it’s for the afternoon or overnight. Truckers and day-trippers need space to park and get a quick bite to eat and commuters with dogs look for good places to let them out and run. The Marmora pumped storage site has the advantage of offering direct access off Highway 7, which allows for the best opportunity to capture just about anyone, from passing motorists with kids in tow to motorcyclists, tour buses and truck drivers. The key is to make a wide range of easy parking options available to all kinds of vehicles.

# Marmora Pumped Storage Site Recommendations

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## Introduction

The Municipality of Marmora & Lake, and the Marmora pumped storage site in particular, has a wealth of natural assets and resources that are well-suited to increased tourism development. Three implementation principles were developed during two working group sessions with the municipality and a group of local stakeholders. These principles were that any recommendations in this report must:

- Emphasize the pumped storage site as a year-round attraction
- Emphasize how development might benefit local businesses:
  - » new opportunities to bid on contracts (food, retail, etc.)
  - » new venues for locals to sell goods
  - » new tourist partnership opportunities between new/existing businesses
- Focus development on geotourism, and in particular:
  - » educational and learning opportunities
  - » showcase for local mining, logging and natural resources history

The recommendations that follow are based on feedback from interviews and surveys, as well on the synthesis of existing tourism plans and studies already undertaken at municipal, county and provincial levels. The recommendations have been organized into three tiers of development. This allows for long-term budgeting to ensure sustainable growth and flexibility.

**Tier One** recommendations include the first steps that need to be taken towards site development, as well as lower-cost initiatives, some of which can be started before construction begins.

**Tier Two** recommendations build on Tier One recommendations and focus on the site's primary tourism infrastructure projects.

**Tier Three** recommendations build on Tier Two recommendations, with projects that may be best undertaken once the majority of pumped storage construction is complete, and also offer options for future blockbuster projects.

These tiers provide a high-level blueprint for the development of the site. There is no timeline included in this report as the pumped storage site construction has not yet been approved, and there are a number of studies that need to occur prior to the implementation of most, if not all, of these recommendations.

A number of the recommendations in this report focus on what is known as 'soft adventure tourism' (tourism that requires little or no experience and is low risk) due to the natural environment assets the Marmora pumped storage site offers and the fact that outdoor tourism is already a draw in the area.

**"As the jobs minister for Ontario, I travel a lot overseas and if there's one thing I hear over and over again from people I meet overseas, it's how they look to Ontario for innovation, I can think of few better examples than this and the opportunity that's before us."**

~ **Eric Hoskins**, Minister of Health and Long-Term Care, former Minister of Economic Development, Trade and Employment  
Source: [The Intelligencer, Marmoraton could mine tourism, jobs](#)



# Marmora Pumped Storage Site

## Tier One Recommendations

Tier One suggestions include the first steps that need to be taken towards site development, as well as lower-cost initiatives, some of which can be started before construction begins. These include:

1. Mapping out a multi-use trail system during site plan development.
2. Implementing rest area facilities for the duration of construction, including portable washrooms, vending machines and signage directing travellers to usable trails and providing information on the project's progress.
3. Establishing the location of larger tourism infrastructure projects (parking lots, visitor centre site) in relation to the pumped storage facilities.

### 1. Multi-use Trail System



The Marmora pumped storage site is already surrounded by an extensive trail network, including the Hastings Heritage Trail and the Trans-Canada Trail, that is mostly managed and maintained by the Eastern Ontario Trail Alliance (EOTA). It is recommended that Marmora & Lake develop a multi-use trail system within the pumped storage site that connects to these existing trails. This will create a hub for the approximately 25,000 current users, including 2000 motorized users, of the EOTA trails.

Many of the multi-use trails already developed in the municipality and county have been built on old railway beds. The pumped storage site offers the opportunity to grow and expand a network of shorter looped trails, which would appeal to day- and multi-day-trippers alike. A master trail plan should be developed to account for all trail development on the pumped storage site, which should include a mix of multi-use 'sport' trails and paved, accessible walking trails that take into account mountain biking, running, hiking, cross country skiing and snowshoeing.

One benefit of building a multi-use trail system in tandem with the construction of the pumped storage facility is that it can be utilized by visitors and locals relatively early on in the development process. The earlier visitors can enjoy the property, the sooner the municipality can start building an invested consumer base and enticing visitors to return to see construction updates, including new trails, facilities and amenities.

Given this, initial trail development should be focused on areas located away from the actual pumped storage facility construction site. The development of these trails should be done alongside clearing for parking lots and other infrastructure developments.

Once trail routes have been established, secondary areas for development along the trail network can be plotted. These might include:

- Picnic and restroom sites
- Birding infrastructure
- Designated sporting trails (for mountain biking, etc.)

## Supporting Facts

- According to EOTA, 85% of Canadians walk for leisure and recreational reasons and the average time spent on trails is [1 hour and 50 minutes](#). Connecting the pumped storage site to the nearby 156-km Hastings Heritage Trail, which has 25,000+ trail users who spend over [\\$6 million annually](#), would encourage additional visitors to spend time and money in the village of Marmora.
- According to the [Ontario Trails Council](#), trails are a popular outdoor destination with approximately 800,000 Ontarians using hiking trails annually:

Economic Benefits				
User Group	KM of Trail	Expenditure Trail Use	Expenditure Day/Night Related	Total
Snomobiles/ATVs	50,000	\$ 682 million	\$ 518 million	\$ 1.2 billion
Hikers	8,000	\$ 70 million	\$ 240 million	\$ 310 million
Urban Pedestrian	4,000	\$ 400 million	\$ 40 million	\$ 440 million
Cyclists - Shared Use	2,000	\$ 20 million	\$ 26 million	\$ 46 million
X-Country Skiers	2 million	\$ 134.5 million	\$ 1.5 million	\$ 136 million
Dog Sledders	34,000	\$ 161,000	\$ 322,250	\$ 483,250
Equestrians	71,000	\$ 3 billion	\$ 649,000	\$ 3.7 billion

## Implementation Considerations

1. Consult expert advisors to determine the extent of the trail system and develop the best approach to developing trails. Recommended resources for trail development on the Marmora pumped storage site include:
  - a. Linda Bracken - EOTA Chair and Marmora & Lake Councillor
  - b. Cindy Cassidy - EOTA General Manager
  - c. John Wright - Northland Power Inc., Executive Director, Business Development
  - d. Peter Dunbar - Recreation, Tourism and Hospitality Consultant who was recommended as one of the top advisors in Ontario for trail development.
2. Establish safety precautions for all the trails and accessible land. This will include fencing, railings, signage and lighting. As trails become available throughout the reservoir, the expenditure on guard rails will be a priority.
3. Address accessibility considerations, such as minimum width and height guidelines, and maximum slope requirements.

4. Develop easy-to-access trails focusing on the areas that are already clear and that offer impressive views of the mine and the village of Marmora. Developing these trails should be done in unison with clearing the pumped storage site for construction on the upper reservoir (this portion of trail development will be further outlined in Tier Two recommendations).

## 2. Rest Area Facilities



Basic amenities such as portable or temporary washrooms, vending machines, picnic tables and parking spaces should be made available to travellers at or before the start of construction. This will help to encourage trail and highway travellers to view the site as a rest stop.

Visually appealing signage outlining the stages of construction and information about the project should be erected near any rest area facilities. This signage should be used as a marketing tool to entice visitors to return again and it is recommended that such signage be included as one component of the overall marketing strategy for the Marmora pumped storage site. Signage should be highly visible from the beginning of the project throughout the expansion of the tourism facilities.

Temporary signage directing visitors to open trails should also be prominent. This area might be established at the current mine viewing platform off Marmora Mine Road. This would also allow travellers to view construction progress.

## 3. Tourism Infrastructure Projects



Much of the development of tourism assets will depend on the size and location of the pumped storage infrastructure and the areas available beyond its boundaries. Without final site specifications from Northland Power, this report is unable to offer specific recommendations on tourism infrastructure location, size, etc.

With that in mind, in addition to the trail development mentioned, the primary high-level development recommendations are:

#### **Parking lot(s) location, size and clearing**

- Locate parking lots off main Highway 7 public entrance
- Construct separate lots for group/tour bus parking and for car parking in order to minimize the visual impact and noise of parking lots; this will allow the site to retain more of its natural character
- Clear lots while construction of the pumped storage power generation facility is underway
- Review recommendations from this report, determine approximate location, size and number of lots needed, then request approval from Northland Power

#### **Visitor centre site location/placement**

- Should be determined in consideration with visitor centre plan (discussed in more detail in Tier Two recommendations) and necessary proximity to pumped storage facilities

#### **Permanent picnic and other recreation area(s) location**

- Determine requirements for open (sporting fields, picnic areas) and naturally wooded areas
- Determine best location for public rest areas; ideally, they should be close to parking lots, trails and washroom facilities

See Appendix A: The Marmora Pumped Storage Site Design Renderings for possible trail locations. An extensive survey of the property will be needed in order to verify the best locations of all paths and trails.



# Marmora Pumped Storage Site

## Tier Two Recommendations

Tier Two suggestions build on the Tier One recommendations in order to build the site's primary tourism infrastructure projects. These include:

1. Further developing multi-use trails.
2. Establishing a designated night sky area on the upper reservoir.
3. Establishing a campground and recreational facility at Mud Lake.
4. Establishing a visitor centre.
5. Building educational opportunities.

### 1. Multi-use Trail Development



Tier One of this report recommends the planning of an extensive trail system around the lower reservoir and surrounding acreage. Tier Two includes the cutting of these trails, and once construction is complete on the upper reservoir, this report recommends including a paved walking trail around the upper reservoir, as well as the development of trails connecting the upper and lower reservoirs.

Nayler's Common Wetland and Trails, located just north of the pumped storage site, was designated a Provincially Significant Wetland by the Ministry of Natural Resources in 2013. Nayler's has become a popular site for birders and nature enthusiasts thanks to local investment in trail clearing, marking and the construction of a viewing platform. Nayler's Common is a prime area for the construction of a series of boardwalk trails that provide an intimate view of the wetlands. Boardwalk trails should be connected to the larger site trail system.

Boardwalks and trails may be used to help educate the public on wetlands and to help build support for the protection and restoration of wetlands, facilitate bird watching and ecotourism, and offer science education and research opportunities at all academic levels.

#### **Key elements include:**

- Access trail or road to wetland boardwalk or trail, parking area, and open kiosk or signage with map and explanatory materials

- The boardwalk and/or trail
- A signage system for marking the trail and points of interest
- Informational brochures

## Implementation Considerations

1. The same advisors noted in Tier One should continue to consult on all aspects of trail expansion.
2. The process of cutting trails through woods can be started as soon as a master plan has been established.
3. Daytime-only access should be considered for trails located closest to the pumped storage facility due to security issues.
4. Undertake necessary environmental, capacity and infrastructure studies of Nayler's Common and surrounding area to determine if development on this scale is possible.
5. Consider features that may be visible from the boardwalk and trail that would make the boardwalk more appealing to use, including vegetation, wildlife, open water and unobstructed views of the surrounding area.
6. There will be several limitations on boardwalk and trail construction, including:
  - a. Endangered and sensitive plant and animal species that may require special protection
  - b. Connection to existing trails and paths, parking lots, and roads
  - c. The possibility of high water or flooding, damage due to annual freezing, and high winds.
  - d. Distractions such as utility lines and roads
  - e. The cost of construction and maintenance

See Appendix A: The Marmora Pumped Storage Site Design Renderings for more information on implementation considerations.

## 2. Night Sky Designation Area



Dark sky tourism is a small but growing trend and a dark sky is as much of an asset as beautiful scenery. It is recommended that the municipality designate a stargazing area on the upper reservoir that is accessible via the lower trail system.



This area should be clearly separate from the upper reservoir of the pumped storage site and the paved trail, as it is meant to best be used in the evening. Depending on the proximity of the stargazing area to the facility operations, it may be difficult to establish a formal dark-sky preserve. However, dark-sky preserves have positive effects on the health of nocturnal wildlife and establishing formal boundaries are recommended if it is possible to do so. Regardless, establishing an area with minimal light pollution and outfitted with picnic tables will help to encourage stargazing and provide a destination for school groups.

**“Through 2010, we have seen a jump in the business by 25 to 30%, specifically because of the Dark Sky Park. Up to this point, the vast majority of people had a very definite interest in astronomy. The extra visitors have come to see what all the fuss is about, but also because they have seen a dark sky on holiday and want to repeat the experience in the UK.”**

~ BBC

### Implementation Considerations

1. Find areas that are both accessible and free of unneeded light
2. Identify safe routes between the campsites and stargazing locations
3. Ensure there is a school-friendly stargazing area
4. Source an online star chart and/or a planisphere for distribution
5. Offer binoculars rentals
6. Install permanent telescopes

\* Northland Power is currently unaware of the lighting requirements needed on site.

## 3. Mud Lake Campground



Mud Lake is located on the Marmora pumped storage site and is set back from the reservoirs and proposed location of the pumped storage facility. It is known for excellent fishing, and it is large enough in size to potentially support recreational activities. With room for a campground and a lake that offers fishing, stand-up paddleboarding, canoeing, kayaking and more, it has the potential to be an excellent economic resource for the municipality and will complement its existing water resources of Crowe River and Crowe Lake.

Initially, the site should offer camping space for tents and RVs only. This will keep initial infrastructure simple and implementation costs low. Other campground facilities to consider include fire pits, communal shower and washroom facilities, and a small sundries store.

The site should host a year-round equipment rental location; this was noted as a must-have by many local stakeholders, and equipment rental is frequently cited as something many tourists have to leave Marmora & Lake to access. Equipment does not have to be limited to water sports and might include a number of assets that could be utilized across the entire pumped storage site:

- Canoes, kayaks and stand-up paddleboards
- Fishing and ice fishing equipment
- Bicycles (touring and mountain)
- Cross-country skis and snowshoes
- Binoculars (for birding and stargazing)
- Tents (for summer and winter camping)

## Supporting Facts

- 526,500 trips to RTO 11 were made for fishing in 2011.  
Source: Ministry of Tourism, Sport and Culture's Regional Tourism Profiles - Visits
- 1,029,000 visitor-nights were spent in camping/RV facilities in 2011 in RTO 11. The main purpose of 93% of these visits was for pleasure, which suggests that this region is already seen as a popular destination for camping/RVing.  
Source: Ministry of Tourism, Sport and Culture's Regional Tourism Profiles - Visits
- Camping is identified as a Mass Appeal attractor in the Hastings County Premier-ranked Tourist Destinations (PRTD) Final Report.
- Spending associated with the Canadian sport tourism industry reached \$3.6 billion in 2010, an increase of 8.8% from 2008, based on Statistics Canada (2010) data commissioned by the Canadian Sport Tourism Alliance (CSTA). This compares to a 0.7% decrease in tourism demand for the Canadian tourism industry as a whole, thus continuing sport tourism's trend of being one of the fastest growing industry segments within Canada's tourism industry.  
Source: Canadian Sport Tourism Alliance

## Implementation Considerations

1. Undertake necessary environmental, capacity and infrastructure studies of Mud Lake and surrounding area to determine if development on this scale is possible.
  - a. Ideally, conduct all studies in tandem with studies done for the pumped storage site and/or while lower reservoir water drainage is occurring. This will allow for site clearing to happen alongside trail cutting and clearing for parking lots.
2. Infrastructure issues that may arise before, during and after these studies include:
  - a. Connections to municipal sewers and utilities
  - b. Waste management
  - c. Vehicle entry points
  - d. Whether the lake is swimmable and can support a significant number of users
  - e. Connections to the existing trail system
  - f. The number and location of campsites, showers and comfort facilities
  - g. Administrative offices

3. Determine whether the municipality will run the campground or if site management will be contracted out. Will sport equipment rental be publicly run or will it be contracted as well? There are benefits to both that should be considered:
  - a. Is the municipality able to adequately manage the business of running an additional campground and/or equipment rental?
  - b. Will hiring a private company to operate campgrounds allow the municipality to recoup enough of its initial investment in establishing the campground?
  - c. Who will provide upgrades and maintenance?

## 4. Visitor Centre



Visitor centres serve an important function for tourism sites: they act as an anchor for additional development, offering an opportunity to combine design and multi-use functionality that will attract and serve a maximum number of visitors.



In keeping with the target demographics identified earlier in this report, the public now expects a higher level of service, information and retail opportunities packaged in a beautiful design that is also environmentally sustainable. The emphasis should be on local products and local experiences; tourists want to immerse themselves in local experiences rather than passively 'watch' their surroundings.

Development and design of the visitor centre should be driven by the desired interpretive goals for the site. As mentioned in the introduction to these recommendations, stakeholder research indicates that it should be a priority to develop geotourism,

and in particular educational and learning opportunities, and create a showcase for local mining, logging and natural resources history.

The visitor centre should allow for a range of cultural and educational opportunities; it should be a place where visitors can learn about Marmora & Lake's history, interact with informative and educational displays, and enjoy the work of local artisans. Included in the Tier Two recommendations is a primary focus on sustainable planning by establishing a space that will grow with increased demand for tourism activities.

The visitor centre should be a mixed-use space composed of the following elements:

### **Interpretive centre for the Marmora pumped storage site**

- Tours of power generation facilities
  - » It is recommended that Northland Power be consulted to determine a mutually suitable tour. If they do not wish to give tours of the power generation facilities due to security concerns, the municipality should encourage them to participate in creating videos and displays that demonstrate the pumped storage process to visitors.
- If it is unlikely that Northland will be willing to lead tours of the actual energy facility, an interpretive exhibit that provides information about the pumped storage energy facility and acts as a gateway between the centre and more security-sensitive areas of the site should be developed as an alternative. Interviews with representatives at other pumped storage facilities highlighted the existence of a strong demand for educational opportunities for tourists and school groups.
- An interactive explanation and demonstration of how pumped storage works and more specifically, how it works within Ontario's energy production system, should include:
  - » Educational videos
  - » Models of the facility
  - » Interactive exhibits such as 'control the water flow to light a bulb'
- The space housing the centre should be large enough to accommodate tour groups and school field trips.

### **Public washrooms**

- Public washrooms should be free to use and located in an area that the public can reach without paying admission. This will encourage casual visitors from both the highway and the trails to stop at the visitor centre (the number one reason travelers stop is to use washroom facilities).
- Research shows that once you get visitors to stop there is a four-times greater chance they will spend money, and promoting public washrooms increases the opportunity to sell products, services and encourage washroom-users to visit the site's attractions.
- Knowledge of free washrooms will encourage goodwill and increase the likelihood of repeat visits.

### **Cafeteria-style dining options and seating**

- Offering food purchasing options and seating for large groups will ensure that they stay and spend money in the community following group visits; one of Marmora & Lake's current tourism challenges is that medium-to-large groups come for activities (like Greensides Farm) and leave right after because there are no facilities large enough to accommodate groups.
- The municipality should consider establishing highway rest-stop-style food options and/or a convenience stores at the Marmora pumped storage site that are similar to the newly redesigned rest stops down along the 401. Knowing that there is a 401-style rest stop along Highway 7 may encourage more travellers to move off the 401 to Highway 7.

### **Museum**

Marmora & Lake has a rich mining, logging and natural resource heritage and it makes sense to try to capitalize on the educational opportunities offered by this unique site. Options include:

- An anchor site for the existing Miner's Loop that will act as a meeting spot for tours, sell tour guides, and provide regular viewings of Heather Hawthorne's local documentary The Price of



Gold, which highlights the rich history of Deloro; a permanent exhibit at each of the stops on the Loop should also be considered.

- Satellite exhibit of the Canadian Mining Hall of Fame, which has expressed interest in expanding its satellite locations and would be happy to provide more information/options.
- Blockbuster national mining museum (outlined in more detail in Tier 3 recommendations).

## Gallery

Dedicated space to showcase local artists and artisans. The Connected Explorer is interested in experiencing local culture and making space readily available for them to view and purchase souvenirs contributes directly to the local economy.

## Meeting space and/or rooms rentals

There is a lack of available meeting and/or space for medium-to-large groups in Marmora & Lake. Several multi-use rooms would allow for group meetings, health and fitness classes, and other space for community groups, and renting these rooms out would generate income for the municipality, while existing meeting spaces remain available for not-for-profit or low-income organizations.

## Supporting Facts

- The Tim Hortons located on Highway 7 in Madoc is one of the busiest stores in the entire chain, serving between 2,500 and 3,500 cups of coffee on an average day as “truckers, cottagers heading north, commuters heading from Toronto to Ottawa and loyal, daily customers often jam-pack the Madoc parking lot.” The store has been in the top ten percent of Tim Hortons locations for the last three years, which demonstrates great demand in the area for rest stop options.  
Source: <http://www.intelligencer.ca/2010/11/18/madoc-tim-hortons-one-of-the-busiest-in-north-america>
- The Highway 407 East extension from Pickering to Highway 35/115 will help build strong communities and a transportation network that will strengthen Ontario’s economy by creating opportunities for local businesses, employment and population growth. The new highway will also relieve congested sections of Highway 401— Canada’s busiest highway — and improve the movement of goods and services across Ontario. This is very important in the Ontario-Quebec corridor, which facilitated \$560 billion or 74 per cent of Canada’s international trade in 2007. The value of international trade through this corridor represents over 36% of Canada’s GDP. This Highway 407 East extension will also lead to increased usage of the Highway 7 corridor between Toronto and Ottawa, and will make the pumped storage site even more easily accessible to travellers.  
Source: <http://www.highway407east.com/project-info/faqs/>
- Using Electric Mountain as a benchmark, it is estimated that not building a visitor centre at the Marmora pumped storage site and providing only outdoor attractions like multi-use trails will generate almost \$9 million less in tourism-related spending, including \$3.4 million less in total tax revenue and almost \$4.5 million less in total labour income within RTO 11.
- According to one report from the United Kingdom, providing dining options will increase visitors’ length of stay at a visitor’s centre. Coffee, tea and snacks will encourage visitors to stay for an additional 20 minutes, while light fare will encourage visitors to stay for an additional 35 minutes.  
Source: <http://www.building.co.uk/cost-model-visitor-centres/3089572.article>
- Based on our interviews with stakeholders from other pumped storage tourism sites, there appears to be a strong link between the size and scope of a visitor centre and the number of tourists who visit the centre.

## Implementation Considerations

1. The municipality should decide on the priority of the following objectives for the visitor centre:
  - a. Promotion: raising awareness of the site and energy facility
  - b. Filtering: directing visitor traffic through the building to other attractions (Mud Lake, trails, etc.)
  - c. Interpretation: educating visitors about the site and its history
  - d. Substitution: acting as the public “face” of the actual pumped storage facility, which will be inaccessible to the public
2. Once the key objectives of the visitor centre have been identified, the municipality should develop or issue an RFP for the creation of an interpretive master plan that addresses the visitor center facilities and program requirements. This planning process should also serve to define the visitor center messaging, niche, uniqueness, accessibility, interpretive themes, interpretive tools and techniques, displays, programs and services.
3. Based on the interpretive master plan, the municipality should decide on a preferred style of construction. Options may include:
  - a. One large building that houses mixed-use development
  - b. A series of three to five smaller buildings that house distinct developments such as a welcome centre, museum/gallery, conference/activity room rentals, interpretative centre, etc.

This decision will depend on a number of factors, including budget, interpretive use and location. It may be more cost-effective or a better fit with the landscape to design and build several small structures that may shift in purpose and use as tourism grows.

4. Contract a designer and/or architectural firm to design and build the visitor centre. External design will play as important a role as internal design. The exteriors of all buildings should maintain a consistent look that is in keeping with the surrounding landscape. For example, a Muskoka-style visitor centre may better convey the feeling of outdoor adventure than a modern concrete and glass building. Public consultations should be factored into the design process. Visitor center architectural and engineering design is the next level of analysis. Detailed guidance and specifications should be provided by the chosen designer and are beyond the scope of this report.





## 5. Educational Opportunities



Education and learning opportunities should be a key component of visitor centre development, as recommended in the proposal of an interactive learning centre focused on the pumped storage facility. In addition to hosting Canada's first pumped storage energy plant within an open pit mine, the site is rich in resources and natural learning opportunities, and the development of additional learning programs focused on mining and geology would fill a gap in local education offerings. Examples of existing educational sites in the region include the H.R. Frink Outdoor Education Centre and Conservation Area (owned by the Hastings and Prince Edward District School Board in partnership with the Algonquin and Lakeshore Catholic District School Board) and Farmtown Park (operated by the Hastings County Museum of Agricultural Heritage), which offer programs in outdoor education and conservation and agricultural history, respectively.



There is no site in the municipality that is focused on mining and geology education that is designed for children or school groups. It is also important to make educational offerings available to the public, as well school groups, as children's activities are a great draw for travelling families and provide a setting for informal 'learning vacations.' Programming may include a variety of offerings that change seasonally (or at other regular intervals), such as:

- Natural resource development and mining/forestry videos and interactive displays
- Digging for minerals and/or fossils, similar in style to Batawa Ski Hill's Dino Dig
- Panning for gold station
- Safely guided walks and talks along the upper and lower reservoirs
- Campfire programs
- Stargazing and astronomy
- Storytelling
- Living history and oral history programs
- Demonstrations
- Environmental education activities
- Puppet shows and dramatic presentations
- Roving interpretations
- Visitor information stations

## Implementation Considerations

1. Consult with local school boards (like the Hastings and Prince Edward District School Board) when developing the visitor centre's interpretive master plan to ensure that learning tools and goals align as much as possible with Ontario's school curriculum and student learning objectives.
2. Ensure facilities and infrastructure are developed with groups in mind.
3. Partner with post-secondary educational programs to offer work-study positions, volunteer or summer employment, and research opportunities.
4. Develop secondary programming with local community groups, historical foundations and archives that include storytelling sessions, historical reenactments/play/demonstrations and walking tours.



# Marmora Pumped Storage Site

## Tier Three Recommendations

Tier Three recommendations build on Tier Two recommendations by outlining with projects that may be best undertaken once the majority of pumped storage construction is complete, and also offers options for future blockbuster projects. These recommendations include:

1. Further trail development inside the lower reservoir that will allow for fossil viewing.
2. Landscaping with native plants and/or the creation of botanical gardens.
3. Adding outdoor adventure with a zip-line.
4. Expanding the campground facilities at Mud Lake.
5. Establishing a national mining museum on the site.
6. Suggesting future projects.

### 1. Multi-use Trail Development



Northland representatives have already expressed an interest in seeing the municipality develop trails that descend partway into the lower reservoir. Currently, visitors can see the limestone layer in what will be the lower reservoir. The existing water will be drained to optimal levels for pumped storage operations, exposing the fossil layer and mineral deposits located below the limestone layer. A trail that allows direct access to fossil viewing is a great educational asset.

As noted in this report's Demand Analysis, rocks and minerals are already one of the core attractors to the region and providing accessible fossil viewing offers a remarkable opportunity to interact with history. Adding a trail around the lower reservoir where visitors can view rock-embedded fossils will differentiate the Marmora pumped storage site from others around the world and help cement it as a truly unique tourist destination.

### Implementation Considerations

1. Trail design is dependent on the location of Northland Power's pumped storage infrastructure and the best fossil and mineral deposits.



2. Safety and accessibility should be of paramount consideration during the design of this trail.
3. Access should only be available during site operating hours.
4. Access may be self- or tour-guided, though this may depend on access points and whether or not it is necessary to protect the fossils from vandalization.

## 2. Landscaping and Botanical Gardens



Final landscaping should be incorporated once all major construction is completed. The size and envisioned uses of the site make it an ideal area for planting botanical gardens populated by native plants, which would encourage garden tourism.

### **According to a 2011 study completed for the Ontario Garden Tourism Coalition:**

- 26,553,246 North Americans visited botanical gardens while on overnight trips in 2006 (3,246,208 Canadians and 23,307,038 Americans).
- Visiting a garden-themed attraction while on a trip was the 10th most frequent culture and entertainment activity type undertaken by Canadian pleasure travellers in the 2005 and 2006.
- Visitors of garden-themed attractions are well-educated and have above-average household incomes.
- Visitors of garden attraction were more active in culture and entertainment activities while on trips than the typical Canadian pleasure traveller and are especially likely to visit educational attractions, take part in participatory activities and attend live art performances; they were also very active in outdoor activities while on trips, particularly those involving nature and fitness.



The creation of landscaped trails would allow for guided and self-guided walking tours, gardening demonstrations and planting lessons, and even the opportunity to be a 'gardener for the day.' Target markets for this type of programming might include garden tourists, the Connected Explorer, and school or other education groups. These programs could be run on a paid and/or volunteer basis.

### 3. Zip-line



**“Adventure travel is big, and zip-line courses offer a very different and active way to see the sites above the teeming masses. And, can you believe it? There is already a standards organization for zip-lines, showing they have truly arrived.”**

~ [Dennis Schaal](#)



Zip-lines were originally developed as tools for biologists in tropical regions to observe the plant and animal life above the tree canopy (Association for Challenge Course Technology). And according to Skift, more than 700 have been built in North America, with the total number growing about 10% annually. This suggests that zip-lines are a major tourist attractor in the outdoor adventure category, and anecdotally, over the course of preparing this report many local stakeholders expressed a strong interest in a zip-line at the Marmora pumped storage site.

A zip-line on the Marmora pumped storage site would be the first of its kind in Hastings County, as the closest zip-lines are both Treetop Trekking franchises located in Campbellcroft (Ganaraska Forest) and Peterborough. Given the height of the slag heap currently on the pumped storage site, there is a unique opportunity to have lines cross over the pumped storage reservoirs, Mud Lake and/or other recreational trails and woods.

#### Implementation Considerations

1. Lines could be constructed to take guests over the open lower reservoir, creating a completely unique experience.
2. The heavy forestation of the site and man-made ridges of slag provide varying landscape options for constructing platforms and lines at different heights and degrees of incline.
3. The zip-line site should have a well-secured entrance area that is not accessible after operating hours.
4. There are a number of options for operation and construction:
  - a. Lines could be constructed/run by municipality
  - b. Municipality could put out an RFP for tour constructors/operators
  - c. Franchisee could be sought for Treetop Trekking investment: <http://treetoptrekking.com/en/>

## 4. Expand Mud Lake Campground Facilities



Expanding the campground facilities to include camping cabins and larger cabins will attract more overnight visitors. Providing more on-site choice of accommodations broadens the tourism market by meeting a wider range of traveller needs and desires and will appeal to the 'luxury camping' market – designed for people who want to experience nature, but with all the comforts of home – which is currently underserved in the area.

**“There has been a growing desire for ‘authenticity’ – exemplified by the popularity of local produce, farmers’ markets, organic food, crafts – and time with family and friends outdoors. Camping ticks all of these boxes and is inherently sociable.”**

~ Dan Yates, [Pitchup.com](http://Pitchup.com) – an online campsite directory and guide,

Camping cabins offer the feel of camping for those who don't have the gear. They are permanent structures, without running water, that might offer a fire pit, picnic, table and chairs, bed(s) with linens and blankets, bath towels and soap, with access to communal washrooms and showers. Structural options can include wooden buildings, thick canvas tents or yurts.

Cabins may range from studio A-frames with sleeping lofts to two- or three-bedroom models that are able to accommodate whole families, and amenities may range from private bathrooms to gas stoves/fireplaces. The municipality should also consider the construction of rustic lodges that can sleep an even greater number of guests.

### Supporting Facts

- According to the Outdoor Industry Association's Special Report on Camping in 2011, there was a 34% increase in campers staying in lodges in the winter months and a 16% increase in campers staying in lodges during the summer at KOA Campgrounds from 2010 to 2011. This demonstrates a desire exists for winter accommodation, and adding cabins and/or lodges would help to meet this demand.  
Source: <http://www.tiaontario.ca/template.aspx?id=301>
- A study conducted by researchers at the University of Waterloo found that “campsite use level, as measured by the average number of camper nights per campsite, is significantly higher” for campsites that provide electricity, higher levels of site privacy and higher overall quality. Expanding the Mud Lake campground will allow the municipality to offer campers these amenities.  
Source: [www.ahs.uwaterloo.ca/~eagles/.../Sildoja\\_and\\_Eagles\\_2004\\_000.pdf](http://www.ahs.uwaterloo.ca/~eagles/.../Sildoja_and_Eagles_2004_000.pdf)
- Ontario Parks offers 'Learn to Camp' programs in 9 participating parks; these programs are popular with new immigrants, and transportation is often provided from city centres to the parks. With its central location between Ottawa and Toronto, the Mud Lake campground would be an ideal location to host such a program, and the number of amenities at the site is likely to attract repeat visitors.



## 5. Blockbuster National Mining and Earth Science Museum



Marmora & Lake has not fully capitalized on its rich heritage. With a history of logging, the distinction of being Upper Canada’s first iron town and a diverse geological location, the pumped storage site would make an ideal setting for a National Mining and Earth Science Museum—imagine something as entertaining as the Ontario Science Centre or Montreal’s Espace pour la vie. The Marmora pumped storage project is a flagship for green renewable energy, and there are strong connections between pumped storage, energy production, the environment, and the geologic makeup and historical use of the area.

This is not the time to be bound by limitations: the larger the attraction, the larger the economic impact. By developing attractions that are must-see for all visitors to the province, the pumped storage project will create jobs, attract new residents and retain current ones, grow municipal income and increase property values. In short, thinking big will boost the overall prosperity for Marmora & Lake and Ontario as a whole.

A museum located on the Marmora pumped storage site could be modelled on the Britannia Mine Museum, which is located in British Columbia. Formerly a working copper mine, the site is now an award-winning mining museum that celebrates B.C.’s industrial past. Marmora & Lake’s museum should be similar in scope, with attractions that include panning for gold and reconstructions of mining facilities to displays of tools used at Marmoraton and Deloro, delivered through interactive programming. This would be an excellent space in which to celebrate Marmora & Lake’s mining history and to collect in one place the artifacts and stories that shaped this region.

The success of Canada’s museums is due to careful and strategic collaboration across all levels of government. Given this, and due to the longer-term scope of this recommendation, we have not provided implementation considerations here. Much more research is necessary before moving forward with the development of this asset, and that research is outside the scope of this current project.

### Supporting Facts

- There are 37 history and science museums in Ontario and only one of them is located in RTO 11. Building a National Mining and Earth Science Museum in the village of Marmora will help address the region’s underrepresentation in this area and provide visitors and locals alike with a broader range of educational tourism offerings.  
Source: Ministry of Tourism, Sport and Culture’s Regional Tourism Profiles - Establishments
- 31.2% of seasonal residents in South Hasting have said that they “would like to start participating” in a local heritage museum/centre.  
Source: 2013 Seasonal Residents Survey - North & South Hastings

## 6. Future Project Recommendations

These additional projects fall outside of the scope of the tiered recommendations included in this report; however, they are viable projects that should be considered by the municipality once the pumped storage site is established as a tourism destination. The viability of these projects is contingent upon there being enough demand to justify committing the resources required to build and operate them, and once this demand can be adequately demonstrated the municipality should explore the possibility of developing these tourism assets.

It should be noted that each of these future project recommendations were suggested by multiple stakeholders, demonstrating belief that they have a place in the overall picture of tourism in Marmora & Lake.

### **360°-view Restaurant**

The highest point of the pumped storage site offers an incredible 360-degree view of the surrounding area and is the ideal location for an event venue and restaurant. Marmora & Lake would benefit from a year-round, stylish and good-sized venue for events and entertainment, and as tourism increases there will be a growing demand for upscale dining. Building a unique eating establishment will help round out the tourism offerings at the pumped storage site and make an already-one-of-a-kind location that much more attractive to potential visitors.

In fact, demand for additional dining options in Marmora & Lake already exists among seasonal residents, other long-term visitors and locals. In the 2013 Seasonal Residents Survey - North & South Hastings, seasonal residents were asked "What goods or services are currently not available near your seasonal residence that you would like to be able to obtain?" A large percentage of the responses ask for better restaurants or other dining options.

### **Helipad**

The inclusion of a helipad provides two key community benefits: first, it supports the luxury tourism market by offering the option for helicopter tours of the surrounding area; and second, it also supports the local community by providing a safe landing space for emergency helicopters to transport patients to nearby hospitals. A helipad would provide quicker, more direct access to care for trauma patients and for Marmora & Lake's aging population, given that the nearest emergency room is located 25 minutes away in Campbellford.

### **Gondola**

Gondolas are being increasingly utilized as a transit option at locations with heavy tourism. For example, an Emirates Air Line cable car was installed for the 2012 Summer Olympics to allow easy access to Olympic venues.

We recommend further research into the installation of a gondola to connect Nayler's Common and the pumped storage site once the site is established as a tourism centre and there is a sufficient number of tourists to justify this type of infrastructure.

#### **A gondola offers a number of potential benefits:**

- Offers spectacular views of the village of Marmora and the pumped storage site.
- Reduces the need to drive between sites and provides greater accessibility to the entire pumped storage site directly off Highway 7.
- Offers trail users a link between the top of the trail system and downtown Marmora.
- Encourages visitors at the pumped storage site to visit local businesses by more directly connecting the pumped storage site and downtown Marmora.

# Municipal Recommendations

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As tourism is still very much a small industry in Marmora & Lake, this section outlines key considerations that should be taken into account before implementing any of the previous recommendations. These include:

1. Initiating a project management strategy to ensure the proper oversight for the multitude of tourism opportunities.
2. Investing in infrastructure to help local businesses thrive, protect the municipality's existing assets and highlight places that are valued by the community.
3. Community capacity building to strengthen Marmora & Lake's community economic and social resources.
4. Properly marketing the attractions proposed in this report to attract more visitors to the pumped storage site.

## 1. Project Management

Given the scope of the recommended tourism asset development and the number of partners involved, maintaining ongoing, coordinated communications will be one of municipality's keys to success. A proper project management strategy will help the municipality effectively manage tourism assets, make the most of Northland Power's readiness to accommodate on-site development of tourism infrastructure and generate a greater economic boost for local businesses.

### Implementation Considerations

1. Strike a steering committee or group to manage the implementation of the Recharge Marmora Tourism Plan and the development of tourism assets on the pumped storage site; this may be the responsibility of the economic development committee or another newly formed group. The committee should report directly to council and have the authority to oversee tourism asset development.
2. Hire an additional staff person. Reporting to the municipal council and the steering committee, this staff member should help implement the Recharge Marmora Tourism Plan, provide day-to-day oversight of tourism asset development, represent the municipality's interests in working with local stakeholders, and act as a liaison between the municipality and Northland Power.
3. Re-establish a local business improvement association. Local businesses need to be prepared to make the most of the increased number of visitors to the area. This voluntary group can share resources and work with the tourism steering committee to further its members' collective interests.
4. Establish a clear relationship with Northland Power, who have expressed a strong willingness to enable the municipality to develop public tourism assets. However, commitments, responsibilities and costs associated with specific projects have yet to be determined. The municipal council or tourism steering committee should work with Northland Power to establish a clear relationship that includes how Northland Power will enable the development and ongoing maintenance of public tourism assets moving forward.
5. Establish a clear implementation plan. This report recommends a broad plan to develop tourism assets with a focus on the pumped storage site. Municipal council and the tourism steering committee must determine which elements to adopt and should then establish a master implementation plan that includes precise deliverables. This implementation plan must take into account Northland Power's timeline for building the pumped storage facility and the municipality's ability to reasonably finance, build and manage tourism assets.

## 2. Infrastructure Investments

Like many rural municipalities in North America, Marmora & Lake has aging infrastructure. It is particularly important to consider infrastructure improvements that will support both increased tourist traffic and an increased population base as the area grows in popularity. The municipality should consider the following actions to begin the process of upgrading existing infrastructure and building new facilities to support its burgeoning tourism industry.

**“A strong, prosperous rural Ontario requires modern and efficient infrastructure.”**

~ **Grant Crack**, Member of Provincial Parliament for Glengarry-Prescott-Russell  
and Parliamentary Assistant to the Minister of Rural Affairs  
Source: [Market Wired](#)

### Implementation Considerations

1. Identify public infrastructure services, facilities and demands that need to be developed or upgraded to meet citizen and visitor needs. The Marmora pumped storage project will attract a huge number of visitors to the area and this will put a strain on existing infrastructure. The municipality should survey its existing infrastructure to determine what is lacking and what will need to be upgraded in order to adequately serve increased tourist traffic. This could include:
  - Offering free wireless Internet provided by municipally owned broadband throughout the visitor centre at the pumped storage site and the village of Marmora.
  - Providing public transportation or shuttles between local sites of interest such as the pumped storage site, the villages of Marmora and Deloro and Crowe Lake.
  - Creating bike lanes and extending sidewalks to encourage pedestrian and bike traffic from downtown Marmora to the site entrance off Marmora Mine Road.
  - Working to attract small businesses and franchises to fill in retail and service gaps, as many full-time and seasonal residents believe there are many gaps in Marmora & Lake’s retail landscape.

Given the lengthy timeframe to make infrastructure improvements we recommend that the municipality conduct this assessment as soon as possible.

In addition, many of the tourism assets that this report recommends developing at the pumped storage site will require public utilities. The municipality should make arrangements as soon as possible to provide running water, electricity and other utility services as necessary to buildings that will be constructed at the pumped storage site.

2. Conduct an audit of existing infrastructure and create a plan to improve and better use current assets. In addition to identifying existing infrastructure’s ability to meet increased visitor demands, the municipality should also conduct an audit to determine if infrastructure could be better used to address the needs of local residents and tourists alike. Examples may include finding ways to make more frequent use of the beach cantina on Crowe River, which is predominantly unused. Beautification projects should also be considered, such as offering incentives to encourage building owners to refurbish storefronts on Forsyth Street and Matthew Street/Highway 7.

## 3. Community Capacity Building

Helping local businesses work more effectively by providing up-to-date visitors statistics and feedback, encouraging residents to volunteer at tourism sites and linking locals with regional support networks will create a more engaged public and vibrant business environment.

## Implementation Considerations

1. Establish a method of better collecting visitor statistics and feedback. The National Household Survey figures for the area are of little use due to low response rates and current efforts to collect visitor statistics in Marmora & Lake are uneven at best. The municipality should develop a comprehensive plan to collect as much visitor data as possible to provide decision makers with more reliable information in order to make more informed decisions regarding the direction of local tourism efforts.

Once visitor data and feedback is being collected it should be used to examine the strengths and weaknesses of current attractions and identify gaps in service and product offerings. Feedback forms, surveys and other methods of public consultation will also provide an opportunity for the municipality to collect contact information from tourists who are interested in receiving updates regarding the pumped storage site.

The Hastings County Tourism Review (2012) was able to gather visitor contact information on 30.5% of the surveys it collected. This is a high contact collection rate and suggests there is a promising opportunity to develop a marketing campaign that effectively captures visitor contact information and then uses it to encourage repeat visits.

2. Train local residents and other tourism stakeholders to be ambassadors. Sightseeing is only one aspect of the tourism experience, and interactions with local businesses play a strong role in whether a tourist will return to a destination or recommend it to friends and family. One of the most cost-effective ways to improve Marmora & Lake's overall tourism offering is to encourage local businesses to provide more positive interactions with tourists. There are several well-developed programs within the region:
  - The Ontario Highlands Tourism Organization runs OHvation, a program designed to improve service excellence: <http://ohto.ca/initiatives/ohvation/>
  - The Ontario Tourism Education Corporation offers e-learning service courses: <http://www.otec.org/Home.aspx>
  - The municipality should consider providing service training for businesses that frequently interact with tourists.
3. Continue to determine key community indicators to identify local strengths and weaknesses, and measure improvement. The municipality should consider relying on organizations such as the Ontario Healthy Communities Coalition that can provide support in identifying economic and non-economic community indicators.
4. Keep the public involved and aware of significant milestones and developments. In order to keep the public engaged and feeling positive towards tourism developments, it is important for the municipality to make its residents aware of significant milestones and developments. Public open houses and digital outreach via the Recharge Marmora Facebook page or municipal website updates will allow locals to stay informed and provide input regarding progress at the pumped storage site and through the municipality. It is also important for the municipality to be a frequent and vocal cheerleader for the project so that others will feel comfortable chiming in to express their own excitement.

One key way of involving the public is by providing volunteer opportunities. As evidenced at the Raccoon Mountain (TVA) pumped storage site, allowing locals to volunteer will foster a sense of ownership and engender a more positive attitude among the community towards tourism development.

5. Continue working with regional tourism organizations. Regional tourism organizations represent an important network for support and visitor referrals. The municipality should continue fostering relationships with Bay of Quinte Tourism, Ontario's Highlands Tourism Organization, Hastings County Opportunities in Tourism, and Ontario Ministry of Tourism, Culture and Sport and should seek out collaborative opportunities where possible. Other tourism organizations are a rich source for cross-promoting events and attractions through word of mouth, rack cards and other printed materials,



and general awareness campaigns. The municipality should also consider applying to be a part of national tourism campaigns such as the Canadian Signature Experiences program run by the Canadian Tourism Commission.

In addition, the municipality should look to build new tourism-related relationships or form new groups to extend its tourism support network. For example, there may be an opportunity to work with other communities along Highway 7 to build a "Drive 7" campaign.

## 4. Marketing

The Recharge Marmora brand was created to establish a tourism product that would capture attention and generate excitement about Marmora & Lake's future. This brand acts as a call to action for locals and visitors to participate in 'recharging' Marmora & Lake's economy.

Canada's Wonderland, Niagara Falls and Blue Mountain are all notable tourism brands in Ontario, and Marmora & Lake needs to market itself in a similar manner. Other pumped storage facilities have names like Electric Mountain and Raccoon Mountain, which convey a sense of the outdoor experience they offer. The name of the Marmora pumped storage site should have significance to the site as well as generate excitement and a desire to visit.



Through the use of blogs, social media, advertorials and other marketing efforts, Marmora & Lake can introduce itself to potential visitors; Marmora & Lake already has an up-to-date Facebook page that acts as a resource for upcoming events. This type of approach is much more cost effective than more traditional marketing efforts, even though content creation is most effective when updated regularly.

### Implementation Considerations

1. Hire a creative agency or marketing manager to develop and carry out a marketing campaign with a focus on content marketing. Marmora & Lake should begin work on marketing to tourists as soon as possible. This will allow for organic growth leading up to and during the construction of the pumped storage facility. Activities that might begin now include:
  - Developing a Marmora & Lake tourism microsite that is engaging and mobile friendly
  - Increasing Marmora & Lake's online and social media presence
  - Developing collateral that targets the 15-44-year-old demographic
  - Adding new highway signage through the Tourism-Oriented Directional Signage (TODS) program
  - Utilizing existing platforms like Urbanspoon and TripAdvisor
  - Developing a seasonal tourist flyer/handbook for shopping in Marmora & Lake

Inbound content marketing costs 62% less per lead than outbound marketing and generates 54% more leads (WebDam Solutions), and focusing on content marketing will allow the municipality to get the most from a limited marketing budget. It is also easy for organizations with little marketing experience to outsource content marketing, with 62% of companies currently outsourcing their content marketing (Mashable). By targeting content marketing campaigns based on specific demographics (e.g., the Connected Explorer) and geographic regions (e.g., Ontario and Quebec), the municipality can ensure that its advertising is focused on reaching the audiences who are most likely to visit the area.

2. Create a Recharge Marmora Fund to support trail development, historical initiatives, equipment purchases and other local activities. A Recharge Marmora Fund will serve two purposes: first, it may help to finance the development and maintenance of minor but significant tourism elements such



as historical initiatives, trails or local events. Second, the fund could also help the municipality encourage Marmora & Lake residents to act as ambassadors by giving locals a sense of ownership and offering them an active role in tourism development. It will also provide the provincial government and other stakeholders with additional evidence that the community broadly supports the pumped storage project.

The money for the Recharge Marmora Fund should be solicited through local fundraising, sponsorships and local activities. Fundraising expectations should be modest and selecting a specific goal, such as sponsoring the development of a trail or paying for historical plaques at significant sites, would encourage wider community interest and allow supporters to measure progress towards the fundraising goal.

3. Develop a tourism-focused website that is engaging, easy to use and that will act as a hub for content marketing and other communications. The Internet is one of the main sources of information that tourists rely upon to learn about the area. Marmora & Lake should develop a stand-alone tourism website (separate from the municipal site) that includes all aspects of Marmora & Lake's tourism offerings, such the trail system, Miners' Loop, Crowe Lake and Crowe River, with a strong focus on the pumped storage site.

Building a tourism-focused webpage or website sooner rather than later will allow Marmora & Lake to begin generating interest in the pumped storage site, provide updates on the progress being made, and capture valuable contact information from potential visitors so that Marmora & Lake can begin marketing to them once the appropriate tourism assets are in place. One example of successful sister tourism and corporate sites may be found at [bayofquinte.ca](http://bayofquinte.ca) and [tourism.bayofquinte.ca](http://tourism.bayofquinte.ca).

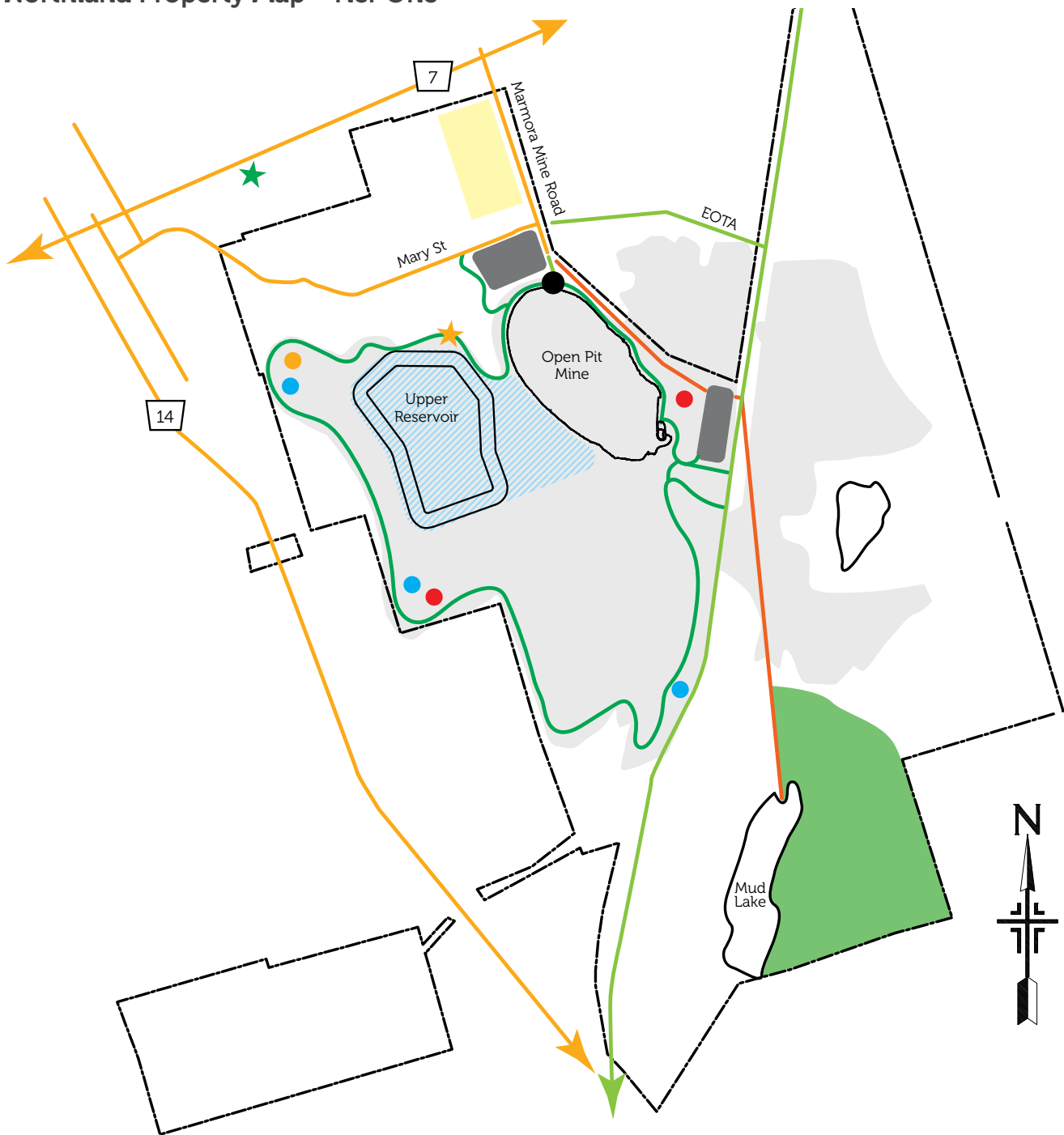
4. Brand the tourism destinations at the pumped storage site. The Marmora pumped storage site should be seen as a must-stop location for travellers on Highway 7 and as a major destination for tourists. Positioning the Marmora pumped storage site as a major destination on par with Niagara Falls or the CN Tower will take time, and starting the branding process before construction begins will afford the municipality the opportunity to share the size and scope of on-site development, attract attention for tourist attractions as early as possible and allow as much time as possible to develop widespread interest in Eastern Ontario's newest tourist destination.
5. Reach out to schools. Encouraging schools to send field trips to the Marmora pumped storage site will provide an excellent addition to the overall number of annual visitors to the site. It is important that the educational offerings at the site align with the current educational curriculum, ideally across all grade levels. Several of the existing pumped storage sites interviewed noted that schools are often eager to visit pumped storage locations but must base their timing on the school calendar; at other pumped storage sites, schools tended to visit most in the spring. This means that availability is often quite restricted. Given this, it is recommended that the municipality begin reaching out to schools during Tier One development in order to allow for sufficient time to arrange for field trips. Additionally, forging connections with post-secondary training will help to ensure skilled workers in fields ranging from carpentry to tourism are available for employment at the site.
6. Research potential external funding resources. Stable and sustainable funding is the cornerstone of stable and sustainable growth, and a combination such as community fund-raising (as mentioned above) and private and public investment should be investigated once the implementation plan has been finalized.

# Appendix

# Appendix A

## The Marmora Pumped Storage Site Design Renderings

### Northland Property Map - Tier One

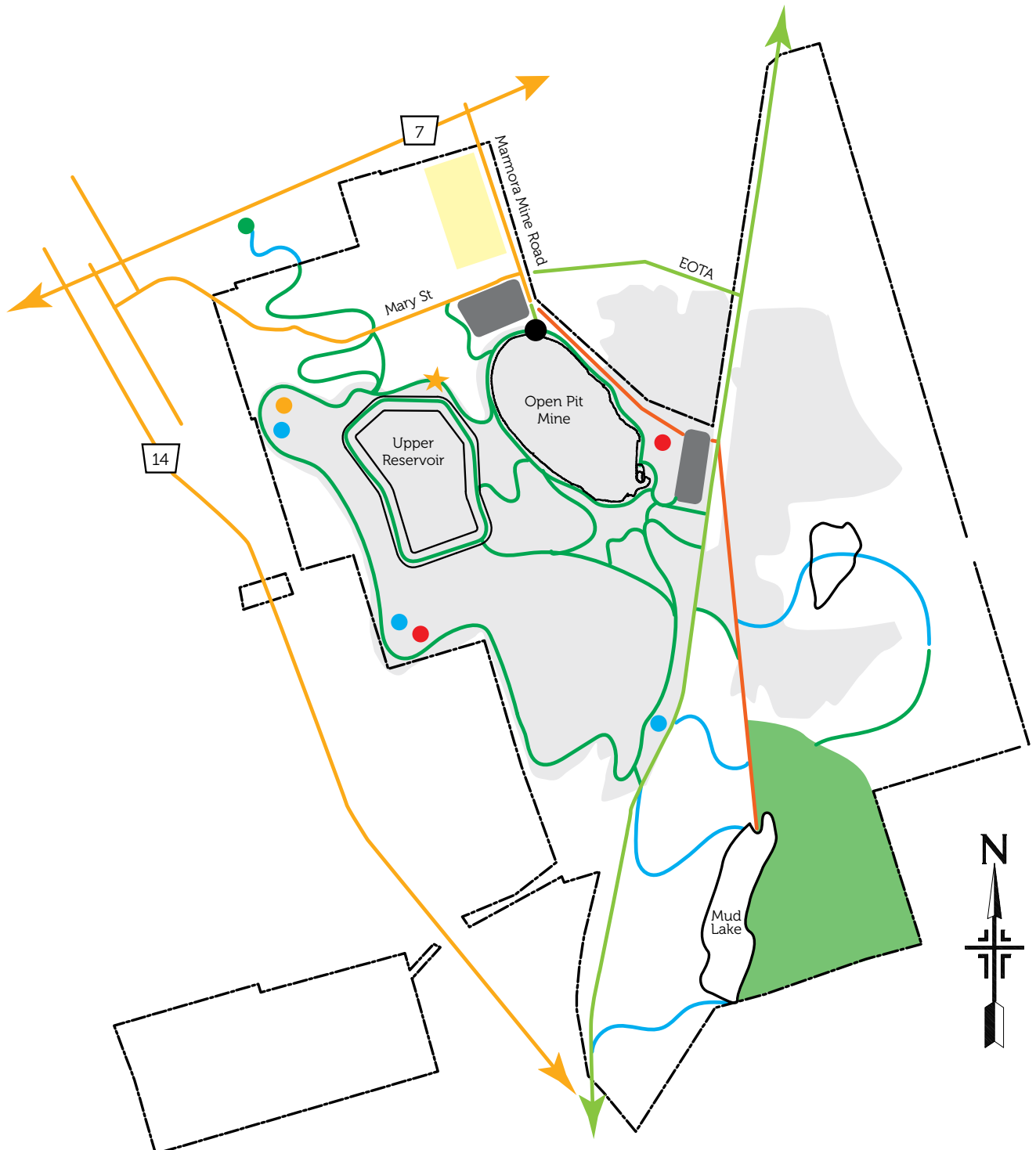


LEGEND					
	Cleared Ground Area		Possible Trail Extensions*		Picnic Areas*
	Northland Property Line		Northland Construction Zone**		View of Crowe River and Lake
	Current Lookout and Parking		Naylor's Common		360 Degree Lookout Point
	Existing Roads		Parking*		
	Possible Road Extensions*		Visitor Centre Site Location*		
	Existing Trails		Rest Area Facilities*		

\*Conceptual location recommendations only.

\*\*Location assumption.

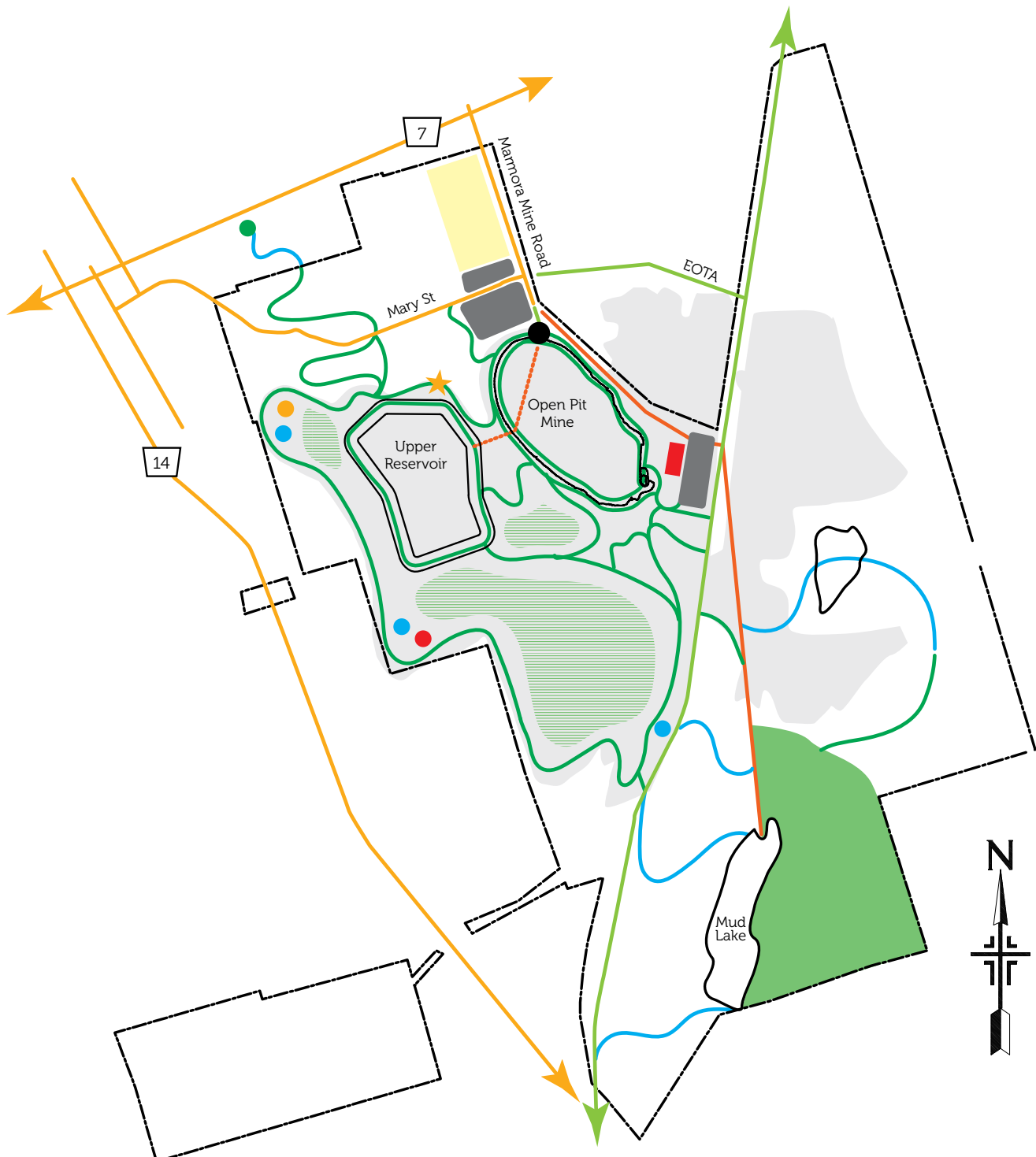
# Northland Property Map - Tier Two



LEGEND					
	Cleared Ground Area		Possible Trail Extensions*		Picnic Areas*
	Northland Property Line		Naylor's Common		View of Crowe River and Lake
	Current Lookout and Parking		Parking*		360 Degree Lookout Point
	Existing Roads		Visitor Centre Site Location*		Mud Lake Campground*
	Possible Road Extensions*		Rest Area Facilities*		Possible Boardwalks
	Existing Trails				

\*Conceptual location recommendations only.  
 \*\*Location assumption.

# Northland Property Map - Tier Three



LEGEND			
Cleared Ground Area	Possible Trail Extensions*	Picnic Areas*	Zip Line
Northland Property Line	Nayler's Common	View of Crowe River and Lake	National Mining Museum
Current Lookout and Parking	Parking*	360 Degree Lookout Point	Botanical Gardens
Existing Roads	Visitor Centre Site Location*	Mud Lake Campground*	Possible Boardwalks
Possible Road Extensions*	Rest Area Facilities*		
Existing Trails			

\*Conceptual location recommendations only.  
 \*\*Location assumption.



## Appendix B

### The Economic Impact of Visitor Centre with Museum & Gallery in RTO 11 in 2014

This report was generated by the Ontario Ministry of Tourism & Culture's TREIM model on July 24, 2014

Note: The Ministry of Tourism and Culture does not take any responsibility for inputs that the user has provided, nor for the interpretation of the results.

#### 1. Introduction

This report provides an estimate of the economic impact that Visitor Centre - Museum & Gallery is expected to have on Ontario's economy, in terms of Gross Domestic Product, employment and taxes generated. The analysis is based on the following information the user has provided to the MTC's Tourism Regional Economic Impact Model:

Number of Visitors for Activity (or Event) of Type Museums & Galleries				
Origin	Same Day		Overnight	
	Total Number of Visitors	Percent of Visitors' Origin	Percent of Visitors' Origin	Average Length of Stay (nights)
Ontario	235,370	58.40%	41.60%	2
Rest of Canada	6,437	58.80%	41.20%	4
USA	7,564	27.70%	72.30%	5
Overseas	629	12.50%	87.50%	3
<b>Total</b>	<b>250,000</b>			

Given that the detailed breakdown of spending by the above visitors on category, such as transportation, accommodation, etc. is not available from the user, the TREIM utilized the average expenditure of visitors in RTO 11 with characteristics closest to those provided by the user from Statistics Canada's 2009 Travel Survey of Residents of Canada and the International Travel Survey to generate the detailed spending as followings ( in dollars ):

Travel Services	\$ 0
Public Transportation	\$ 796,207
Private Transportation - Rental	\$ 139,640
Private Transportation - Operation	\$ 6,244,267
Local Transportation	\$ 209,874
Accommodation	\$ 4,963,448
Food & Beverage - At Stores	\$ 2,589,900
Food & Beverage - At Restaurants/Bars	\$ 12,138,942
Recreation & Entertainment	\$ 5,606,690
Retail - Clothing	\$ 3,961,139
Retail - Other	\$ 2,378,534
<b>Total</b>	<b>\$ 39,028,644</b>

**The user also has selected the following parameters:**

- The visits take place in RTO 11 in 2014
- The impact is to be shown for RTO 11 and for Rest of Ontario
- Induced impacts of household spending are included
- Induced impacts of business investment are included
- The economic environment is as follows:

Baseline	2010	2011	2012	2013	2014
Ontario Real GDP (% change)	3.20%	2.88%	3.26%	2.38%	1.86%
Ontario CPI (% change)	2.43%	2.25%	2.13%	1.53%	1.42%
Ontario Population (% change)	1.11%	1.15%	1.19%	1.33%	1.21%
Ontario Unemployment Rate	8.72%	8.32%	7.67%	7.43%	6.95%
Government of Canada 3 month T-Bill Rate	0.60%	1.72%	3.11%	3.46%	3.07%

## 2. Summary of Findings

Economic Impacts of Visitor Centre - Museum & Gallery in RTO 11 in 2014 ( in dollars )

	RTO 11	Rest of Ontario
<b>Total Visitors' Spending</b>	<b>\$ 39,028,644</b>	
Gross Domestic Product (GDP)		
Direct	\$ 15,938,847	\$ 0
Indirect	\$ 4,400,134	\$ 2,155,212
Induced	\$ 3,879,432	\$ 1,509,374
<b>Total</b>	<b>\$ 24,218,413</b>	<b>\$ 3,664,586</b>
Labour Income		
Direct	\$ 10,254,885	\$ 0
Indirect	\$ 2,979,130	\$ 1,517,790
Induced	\$ 2,372,125	\$ 1,022,642
<b>Total</b>	<b>\$ 15,606,139</b>	<b>\$ 2,540,431</b>
Employment (Jobs)		
Direct	342	0
Indirect	52	29
Induced	40	19
<b>Total</b>	<b>434</b>	<b>48</b>
Direct Taxes		
Federal	\$ 3,989,228	\$ 0
Provincial	\$ 4,098,718	\$ 0
Municipal	\$ 24,873	\$ 0
<b>Total</b>	<b>\$ 8,112,818</b>	<b>\$ 0</b>
Total Taxes		
Federal	\$ 6,763,543	\$ 737,190
Provincial	\$ 5,455,299	\$ 573,457
Municipal	\$ 69,052	\$ 11,993
<b>Total</b>	<b>\$ 12,287,894</b>	<b>\$ 1,322,640</b>

Economic Impacts of Visitor Centre - Museum & Gallery in RTO 11 on GDP by industry ( in dollars )

Industry	Impact on RTO 11		Impact on Rest of Ontario	
	Direct GDP	Total GDP	Direct GDP	Total GDP
Crop and Animal Production	\$ 0	\$ 115,386	\$ 0	\$ 58,195
Forestry, Fishing and Hunting	\$ 0	\$ 11,849	\$ 0	\$ 10,856
Mining and Oil and Gas Extraction	\$ 0	\$ 21,783	\$ 0	\$ 22,174
Utilities	\$ 0	\$ 331,122	\$ 0	\$ 65,529
Construction	\$ 0	\$ 613,400	\$ 0	\$ 97,077
Manufacturing	\$ 0	\$ 724,392	\$ 0	\$ 683,236
Wholesale Trade	\$ 0	\$ 745,417	\$ 0	\$ 305,403
Retail Trade	\$ 1,759,042	\$ 2,580,876	\$ 0	\$ 191,356
Other Transportation and Warehousing	\$ 674,303	\$ 948,328	\$ 0	\$ 294,397
Ground Passenger Transportation (excl. Rail)	\$ 186,795	\$ 228,983	\$ 0	\$ 17,891
Information and Cultural Industries	\$ 130,923	\$ 487,967	\$ 0	\$ 202,174
Other Finance, Insurance, Real Estate and Renting and Leasing	\$ 0	\$ 1,496,429	\$ 0	\$ 505,579
Car Renting and Leasing	\$ 76,979	\$ 103,006	\$ 0	\$ 16,571
Owner Occupied Housing	\$ 0	\$ 722,989	\$ 0	\$ 85,176
Professional, Scientific and Technical Services	\$ 0	\$ 439,987	\$ 0	\$ 235,540
Other Administrative and Other Support Services	\$ 0	\$ 266,260	\$ 0	\$ 112,408
Travel Agencies	\$ 0	\$ 0	\$ 0	\$ 0
Education Services	\$ 0	\$ 35,456	\$ 0	\$ 6,081
Health Care and Social Assistance	\$ 0	\$ 112,046	\$ 0	\$ 86,549
Arts, Entertainment and Recreation	\$ 2,174,046	\$ 2,269,964	\$ 0	\$ 65,698
Accommodation Services	\$ 3,889,244	\$ 3,921,595	\$ 0	\$ 138,080
Food & Beverage Services	\$ 3,537,891	\$ 3,668,438	\$ 0	\$ 230,035
Other Services (Except Public Administration)	\$ 25,200	\$ 239,146	\$ 0	\$ 71,257
Operating, Office, Cafeteria, and Laboratory Supplies	\$ 0	\$ 0	\$ 0	\$ 0
Travel & Entertainment, Advertising & Promotion	\$ 0	\$ 0	\$ 0	\$ 0
Transportation Margins	\$ 0	\$ 0	\$ 0	\$ 0
Non-Profit Institutions Serving Households	\$ 158,402	\$ 338,004	\$ 0	\$ 37,650
Government Sector	\$ 188,138	\$ 415,993	\$ 0	\$ 80,292
Net Indirect Taxes on Production	\$ 0	\$ 29,745	\$ 0	\$ 5,496
<b>Total</b>	<b>\$ 15,938,847</b>	<b>\$ 24,218,413</b>	<b>\$ 0</b>	<b>\$ 3,664,586</b>

**The Economic Impact of Visits** in RTO 11 and other Ontario regions: since no Ontario region is economically self-sustaining, in order to produce the goods and services demanded by its visitors, it will need to import some goods and services from other regions. As such, some of the economic benefits of the visitors' spending in RTO 11 will spill over to other Ontario regions, such as the one you have selected as "additional". If the second column of Table 1 contains only zeros, then that means that RTO 11 does not trade with that region.

**Gross Domestic Product (GDP):** value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travelers.

**Direct impact:** refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travelers, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc. Direct impact on GDP, employment and tax revenues is also called tourism GDP, tourism employment and tourism tax revenues.

**Indirect impact:** refers to the impact resulting from the expansion of demand from businesses or sectors directly produce or provide goods and services to travelers, to other businesses or sectors.

**Induced impact:** refers to the impact associated with the re-spending of labour income and /or profits earned in the industries that serve travelers directly and indirectly.

**Employment:** refers to number of jobs, include full-time, part-time, seasonal employment, as well as both employed and self-employed.

**Federal tax revenues:** include personal income tax, corporate income tax, commodity tax (GST/HST, gas tax, excise tax, excise duty, air tax and trading profits) and payroll deduction that collected by the federal government.

**Provincial tax revenues:** include personal income tax, corporate income tax, commodity tax (PST/HST, gas tax, liquor gallonage tax, amusement tax and trading profits) and employer health tax that collected by Ontario provincial government.

**Municipal tax revenues:** include business and personal property taxes that collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with HST or personal income taxes). Rather, these taxes show the percent of the total property taxes collected by a municipality that can be attributed to tourism because of tourism's contribution to the economic activity of the municipality and hence its tax base.

**Industry:** The industry follows Statistics Canada's 2007 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

## Appendix C

### The Economic Impact of Visitors with No Visitor Centre in RTO 11 in 2014

This report was generated by the Ontario Ministry of Tourism & Culture's TREIM model on July 24, 2014

Note: The Ministry of Tourism and Culture does not take any responsibility for inputs that the user has provided, nor for the interpretation of the results.

#### 1. Introduction

This report provides an estimate of the economic impact that Visitors - no visitor centre is expected to have on Ontario's economy, in terms of Gross Domestic Product, employment and taxes generated. The analysis is based on the following information the user has provided to the MTC's Tourism Regional Economic Impact Model:

Number of Visitors for Activity (or Event) of Type Any Outdoors				
Origin	Same Day		Overnight	
	Total Number of Visitors	Percent of Visitors' Origin	Percent of Visitors' Origin	Average Length of Stay (nights)
Ontario	235,370	58.40%	41.60%	2
Rest of Canada	6,437	58.80%	41.20%	4
USA	7,564	27.70%	72.30%	5
Overseas	629	12.50%	87.50%	3
<b>Total</b>	<b>250,000</b>			

Given that the detailed breakdown of spending by the above visitors on category, such as transportation, accommodation, etc. is not available from the user, the TREIM utilized the average expenditure of visitors in RTO 11 with characteristics closest to those provided by the user from Statistics Canada's 2009 Travel Survey of Residents of Canada and the International Travel Survey to generate the detailed spending as followings ( in dollars ):

Travel Services	\$ 0
Public Transportation	\$ 486,306
Private Transportation - Rental	\$ 396,541
Private Transportation - Operation	\$ 6,928,320
Local Transportation	\$ 82,946
Accommodation	\$ 3,797,125
Food & Beverage - At Stores	\$ 4,155,333
Food & Beverage - At Restaurants/Bars	\$ 6,181,715
Recreation & Entertainment	\$ 3,935,348
Retail - Clothing	\$ 1,627,180
Retail - Other	\$ 2,593,926
<b>Total</b>	<b>\$ 30,184,740</b>



The user also has selected the following parameters:

- The visits take place in RTO 11 in 2014
- The impact is to be shown for RTO 11 and for Rest of Ontario
- Induced impacts of household spending are included
- Induced impacts of business investment are included
- The economic environment is as follows:

Baseline	2010	2011	2012	2013	2014
Ontario Real GDP (% change)	3.20%	2.88%	3.26%	2.38%	1.86%
Ontario CPI (% change)	2.43%	2.25%	2.13%	1.53%	1.42%
Ontario Population (% change)	1.11%	1.15%	1.19%	1.33%	1.21%
Ontario Unemployment Rate	8.72%	8.32%	7.67%	7.43%	6.95%
Government of Canada 3 month T-Bill Rate	0.60%	1.72%	3.11%	3.46%	3.07%

## 2. Summary of Findings

Economic Impacts of Visitors - no visitor centre in RTO 11 in 2014 ( in dollars )

	RTO 11	Rest of Ontario
<b>Total Visitors' Spending</b>	<b>\$ 30,184,740</b>	
Gross Domestic Product (GDP)		
Direct	\$ 11,290,866	\$ 0
Indirect	\$ 3,505,587	\$ 1,861,966
Induced	\$ 2,787,174	\$ 1,177,612
<b>Total</b>	<b>\$ 17,583,627</b>	<b>\$ 3,039,578</b>
Labour Income		
Direct	\$ 7,040,179	\$ 0
Indirect	\$ 2,374,120	\$ 1,296,199
Induced	\$ 1,710,097	\$ 794,795
<b>Total</b>	<b>\$ 11,124,396</b>	<b>\$ 2,090,994</b>
Employment (Jobs)		
Direct	221	0
Indirect	41	23
Induced	29	14
<b>Total</b>	<b>291</b>	<b>37</b>
Direct Taxes		
Federal	\$ 2,800,924	\$ 0
Provincial	\$ 2,963,714	\$ 0
Municipal	\$ 17,189	\$ 0
<b>Total</b>	<b>\$ 5,781,827</b>	<b>\$ 0</b>
Total Taxes		
Federal	\$ 4,761,168	\$ 605,295
Provincial	\$ 3,988,188	\$ 473,691
Municipal	\$ 51,054	\$ 10,286
<b>Total</b>	<b>\$ 8,800,410</b>	<b>\$ 1,089,272</b>

Economic Impacts of Visitors - no visitor centre in RTO 11 on GDP by industry ( in dollars )

Industry	Impact on RTO 11		Impact on Rest of Ontario	
	Direct GDP	Total GDP	Direct GDP	Total GDP
Crop and Animal Production	\$ 0	\$ 135,483	\$ 0	\$ 66,099
Forestry, Fishing and Hunting	\$ 0	\$ 11,309	\$ 0	\$ 10,933
Mining and Oil and Gas Extraction	\$ 0	\$ 18,320	\$ 0	\$ 20,409
Utilities	\$ 0	\$ 237,094	\$ 0	\$ 53,941
Construction	\$ 0	\$ 456,682	\$ 0	\$ 84,534
Manufacturing	\$ 0	\$ 673,527	\$ 0	\$ 647,151
Wholesale Trade	\$ 0	\$ 652,432	\$ 0	\$ 278,385
Retail Trade	\$ 1,571,505	\$ 2,148,885	\$ 0	\$ 148,179
Other Transportation and Warehousing	\$ 592,470	\$ 816,470	\$ 0	\$ 287,710
Ground Passenger Transportation (excl. Rail)	\$ 81,904	\$ 112,514	\$ 0	\$ 13,859
Information and Cultural Industries	\$ 103,694	\$ 367,169	\$ 0	\$ 164,538
Other Finance, Insurance, Real Estate and Renting and Leasing	\$ 0	\$ 1,056,230	\$ 0	\$ 391,168
Car Renting and Leasing	\$ 218,601	\$ 237,721	\$ 0	\$ 13,149
Owner Occupied Housing	\$ 0	\$ 510,787	\$ 0	\$ 72,936
Professional, Scientific and Technical Services	\$ 0	\$ 330,007	\$ 0	\$ 191,954
Other Administrative and Other Support Services	\$ 0	\$ 196,416	\$ 0	\$ 90,959
Travel Agencies	\$ 0	\$ 0	\$ 0	\$ 0
Education Services	\$ 0	\$ 24,967	\$ 0	\$ 4,723
Health Care and Social Assistance	\$ 0	\$ 79,573	\$ 0	\$ 64,379
Arts, Entertainment and Recreation	\$ 1,501,912	\$ 1,571,025	\$ 0	\$ 42,826
Accommodation Services	\$ 2,732,400	\$ 2,754,997	\$ 0	\$ 73,985
Food & Beverage Services	\$ 1,810,822	\$ 1,903,343	\$ 0	\$ 135,233
Other Services (Except Public Administration)	\$ 27483	\$ 181,897	\$ 0	\$ 55,813
Operating, Office, Cafeteria, and Laboratory Supplies	\$ 0	\$ 0	\$ 0	\$ 0
Travel & Entertainment, Advertising & Promotion	\$ 0	\$ 0	\$ 0	\$ 0
Transportation Margins	\$ 0	\$ 0	\$ 0	\$ 0
Non-Profit Institutions Serving Households	\$ 111,182	\$ 238,378	\$ 0	\$ 30,024
Government Sector	\$ 132,054	\$ 295,846	\$ 0	\$ 63,388
Net Indirect Taxes on Production	\$ 0	\$ 22,848	\$ 0	\$ 4,915
<b>Total</b>	<b>\$ 11,290,866</b>	<b>\$ 17,583,627</b>	<b>\$ 0</b>	<b>\$ 3,039,578</b>

**The Economic Impact of Visits** in RTO 11 and other Ontario regions: since no Ontario region is economically self-sustaining, in order to produce the goods and services demanded by its visitors, it will need to import some goods and services from other regions. As such, some of the economic benefits of the visitors' spending in RTO 11 will spill over to other Ontario regions, such as the one you have selected as "additional". If the second column of Table 1 contains only zeros, then that means that RTO 11 does not trade with that region.

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**Industry:** The industry follows Statistics Canada's 2007 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

## Appendix D

### Pumped Storage Facility Site-specific Learnings

#### Electric Mountain

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#### Facilities

- Facilities located near a small village and the highest mountain in Wales, and it was a popular area for hiking before the pumped storage facility was constructed.
- The visitor's centre is a two-story building that includes educational exhibits, a café and gift shop, meeting rooms and a community centre, and regularly features local artists in many of these spaces.
- The tourism centre is run by the government
- Operation of the café and a gift shop are contracted out to be run privately.
- The meeting rooms and a small community centre space are rented out.
- Many of the educational exhibits focus on teaching about both pumped storage and the local region.
- There is a "soft play" area where children can play, and that can also be rented out for parties.

#### Visitors and tours

- Approximately 40,000-45,000 people take tours of the facility every year. And roughly 1 in 5 visitors to the centre take a tour of the facility, meaning an estimated 200,000-225,000 people pass through the visitor's centre each year.
- Tours start on a bus that takes visitors into the facility where there is a viewing gallery into a section of the pumped storage facility and videos about how it was built and is operated.
- No cameras or recording devices are allowed, and visitors are provided with lockers to store them before beginning the tour.
- Tours last approximately 70 minutes.
- There is security on the tour and in the soft play area.

#### Staff

- There are 4 full-time staff members, one of whom is a maintenance worker.
- An additional 13 seasonal staff are hired each summer.

#### Advertising

- There is very little advertising done to attract visitors. There are Electric Mountain brochures and a compelling website, but little else in terms of traditional advertising.

- Electric Mountain participates in a regional tourism group that hires a PR firm to collectively promote tourism in the area.
- The only targeted promotional activity is to reach out to schools and present Electric Mountain as a field trip destination, offering workshops that teach about hydro in addition to their standard educational displays.
- Electric Mountain takes into account when schools are most likely to undertake field trips when approaching them about organizing school visits.

### **Best practices and other notes**

- The full-time staff at Electric Mountain work closely with the local community to ensure their buy-in, and Electric Mountain credits its success to a strong partnership with locals.
- They have also focused on developing the village infrastructure and local businesses, as a strong village supports and enhances Electric Mountain's tourism offering.
- Diane noted that protecting the surrounding environment is important to Electric Mountain.

## **Bath County Power Station**

Terry Nelson  
 Manager Fossil & Hydro Operations, Dominion Generation  
 540-279-3372  
 terry.nelson@dom.com

### **Facilities**

- There is no main visitor centre and no central information displays. All information was conveyed as part of a tour through the power generation facility.
- There is also a sizeable recreational area near the power station that offers a number of outdoor activities, including picnics, swimming and fishing. However, while the area is nominally managed by the power station, they do little more than maintain the area and do not track the number of visitors.

### **Visitors and tours**

- They stopped giving tours to the general public last year because of security concerns, although school groups can still book tours. The following notes are about how their tours used to operate.
- Visitors had to book tours in advance, and the power station would not give tours to people who showed up without prior notice.
- Tours began with a short video about the power station, and then went through the control room and other parts of the facility.
- Tours took between 30-60 minutes.
- Tours were given by staff at the power plant (usually managers), and who gave the tours was based on who was available and interested in conducting them. As a result, the enthusiasm of the tour guides varied.
- From 2003 to 2011, the Bath Country power station gave an average of 27.3 tours per year, with an average of 285.5 people per year touring the facility.

## Staff

- Because there is no visitor centre there was no full-time staff dedicated to overseeing tourism activities. Instead, one employee of the power company managed tour bookings in addition to her regular duties, and tours were conducted by staff based on their availability.

## Advertising

- No advertising is done, though there are several online videos about the power facility that may attract visitors.

## Best practices and other notes

- Bath County's interest in tourism operations is nearly non-existent, as they view it as a distraction from their work as a power generation facility. However, Terry noted the importance of having tour guides who are interested in speaking to the public about pumped storage.

## Raccoon Mountain/Tennessee Valley Authority

Contact details

Laura Smith

Operations Performance Analyst,

Tennessee Valley Authority

## Facilities

- The Tennessee Valley Authority (TVA) operates four separate power facility-related visitor centres, one of which is Raccoon Mountain.
- Most of the centres were constructed in the 1970s and renovated in 2007. Some of the centres are open seasonally while others are open year round.
- The sites are extremely scenic and have been run as tourist destinations since the 1970s, including trams and elevators that took visitors into the power facilities. These have since been shut down due to security concerns but were a popular feature when they were running.
- There are also numerous campgrounds owned by the TVA. The TVA directly operates several of the campgrounds and leases the rest of them out to be run privately.

## Visitors and tours

- They have 60,000-80,000 visitors annually, with 40,000-50,000 of them visiting a single site (Fontana).
- There is no direct engagement between visitors and the power plants due to security concerns. Instead, TVA provides virtual tours at the visitor centres.
- Each centre provides general history of the area, details of the specific facility, an interactive map of TVA territory, and other informational displays for visitors.



## Staff

- The TVA has four full-time staff dedicated to managing scheduling and displays. There are also 100 volunteers who help manage visitors and staff the visitor centres. 90% of these volunteers are retired TVA employees, and the other 10% are locals who live near the centres (most of them near Raccoon Mountain).
- TVA has an active retirement association. In addition to providing volunteers, the retirement association pays for the majority of costs for the visitor centres.
- Security is managed by the US Core of Engineers - National District.

## Advertising

- The TVA currently does little advertising outside of brochures, though they attempt to organize school tours for the end of the spring when they have traditionally been most popular with schools.
- In their few advertising activities, they have found it most effective to present their sites “as an experience”.

## Best practices and other notes

- Laura recommends focusing on reasonable, sustainable development. She feels that the TVA has overreached in what it has tried to do by ambitiously attempting to offer too many tourist offerings too quickly. She emphasized that TVA believes that sticking within the tourism budget in recent years has allowed the TVA to consolidate its core offering.
- She also believes that partnerships with other organizations is key. One example she gives is that working closely with regional cycling groups and trail organizations has helped TVA attract more visitors.

## Appendix E

### Snapshot of Current Marmora & Lake Assets

#### Accommodations

- In total there are 21 rooms available to rent in Marmora & Lake
  - » 10 in Bella Vista Motel
  - » 4 in Limestone B&B
  - » 5 in Marmora Inn B&B
  - » 2 in Rustic Comfort B&B
  - » Prices range from \$75 to \$135 per night
- Cottage rentals available seasonally
  - » Prices range from \$600 - \$1100+ per week
- Trailer parks and campgrounds
  - » Bayview Trailer Park
  - » Blairton Tent and Trailer Park
  - » Booster Park
  - » Crowe Valley Campground
  - » Glen Allen Park
  - » Marmora KOA

#### Local Tourist Destinations

- Greensides
- Crowe Lake
- Crowe River
- Beaver Creek
- Legion Park
- Memorial Park
- Geocaching
- Horsin' Around Riding Ranch
- Camping Sites
- Marmora Mine
- Deloro Mine
- Miners Loop
- Saint Mathilda's & Mary's Grave
- Maze Caves
- Trail System
- Conservation Areas
- Marmora Historical Foundation

#### Local Tourist Attractions

- Car Show
- Summer Farmers Market
- SnoFest
- Snowmobile Drags on Lake
- Lions Country Jamboree
- Marmora Country Jamboree
- Scuba Diving
- Whitewater Kayaking
- Hunting/Fishing
- Crowe Lake Poker Run
- Marmora Fair
- Crowe Lake Cruises
- Canada Day Celebrations
- PurdyFest
- MACK Fest

## Food

- Tim Hortons
- Subway
- Country Style
- Square Boy Pizza
- Theresa's Cafe
- Country Cuisine Catering
- Bailey's Cafe
- Marmora Inn Restaurant
- Marmora Pizza Plus
- Bunkers Hideaway

## Shopping and services

- Beer Store
- BMR Boutique Inspiration
- Bonter Marine
- Broadbent's Home Hardware
- Chris' Live Bait
- Cook's Barber Shop
- Drummond's BMR
- Flowers by Sue
- Jillian's Antiques & Things
- LCBO
- Leo's Sport Shop
- Marmora Dollar Plus
- Marmora's Memory Lane
- Nickles Pharmacy
- Newman Oliver and McCarten Insurance
- Peacock Antiques
- Possibilities
- Sandra's Closet
- Savelle Salon & Day Spa
- The Cutting Corner
- Valumart

## Appendix F

### References and Other Resources

#### Boardwalk

[http://aswm.org/pdf\\_lib/2\\_boardwalk\\_6\\_26\\_06.pdf](http://aswm.org/pdf_lib/2_boardwalk_6_26_06.pdf)

<http://www.insidebelleville.com/news-story/4575254-nayler-s-common-is-a-jewel-in-our-midst/>

#### Camping

<https://ownakoa.com/buildakoa/>

<http://www.campingquebec.com/camping-industry/opening-a-campground.html>

<http://www.ontarioparks.com>

<http://www.campinginontario.ca>

#### Demographics

[http://ohto.ca/tourismstartswithyou/uploads/OHTO\\_TSWYKit\\_Web-Pages.pdf](http://ohto.ca/tourismstartswithyou/uploads/OHTO_TSWYKit_Web-Pages.pdf)

#### Funding

##### For Visitor Centre or other building construction

Canadian Industry Program for Energy Conservation:

<http://www.canadabusiness.ca/eng/program/3983/sgc-35/>

Conservation Fund:

<http://www.canadabusiness.ca/eng/program/2006/sgc-35/>

#### Ontario Highway Traffic Patterns

<http://goo.gl/uzIzXY>

#### Provincial Tourism

[http://www.mtc.gov.on.ca/en/publications/Ontario\\_Tourism\\_Market\\_Assessment.pdf](http://www.mtc.gov.on.ca/en/publications/Ontario_Tourism_Market_Assessment.pdf)

[http://www.mtc.gov.on.ca/en/publications/Ontario\\_Tourism\\_Product\\_Assessment.pdf](http://www.mtc.gov.on.ca/en/publications/Ontario_Tourism_Product_Assessment.pdf)

[http://www.wttc.org/site\\_media/uploads/downloads/world2014.pdf](http://www.wttc.org/site_media/uploads/downloads/world2014.pdf)

#### Tourism Ambassador Programs

Manitoba: <http://www.travelmanitoba.com/tourism-industry/planning-assessment-tools/tourism-ambassador-program/>

Myrtle Beach: <http://www.tourismworksforus.com/>

Niagara: [http://www.niagarasrto.com/niagara\\_ambassador](http://www.niagarasrto.com/niagara_ambassador)

Toronto: <http://www.seetorontonow.com/MeetingPlanners/beahost.aspx>

## Trails

- Since 2009, Ontario has invested over \$77 million in trails
- As part of Ontario's 2015 Pan/Parapan American Games Legacy, the Province will be investing approximately \$3.56 million in trails initiatives:
  - » Complete key segments of the Trans Canada Trail Ontario (TCTO) resulting in a continuous route of over 2,000 km
  - » Connect TCTO to four Pan/Parapan Am venues
  - » Reconfigure significant components of Waterfront Trail at Lynde Shores
  - » Include Aboriginal markers at points of significance along the TCTO

From the document Strengthening the Ontario Trails Strategy: Stakeholder Consultations, November 2013  
<http://goo.gl/aserSw>