

# MUSKOKA HERITAGE PLACE

## Operations/Business Plan and Projections

DRAFT FINAL REPORT

June 2017



Lord Cultural Resources is a global professional practice dedicated to creating cultural capital worldwide.

We assist people, communities and organizations to realize and enhance cultural meaning and expression.

We distinguish ourselves through a comprehensive and integrated full-service offering built on a foundation of key competencies: visioning, planning and implementation.

We value and believe in cultural expression as essential for all people. We conduct ourselves with respect for collaboration, local adaptation and cultural diversity, embodying the highest standards of integrity, ethics and professional practice.

We help clients clarify their goals; we provide them with the tools to achieve those goals; and we leave a legacy as a result of training and collaboration.

*Cover images courtesy of [www.muskokaheritageplace.org](http://www.muskokaheritageplace.org)*

# TABLE OF CONTENTS

<b>1. Introduction</b>	<b>2</b>
1.1 Background and Purpose of Study	2
1.2 Scope of Work and Methodology	3
<b>2. Contextual and Comparables Analyses</b>	<b>5</b>
2.1 The Realities of the Museum Marketplace	5
2.2 Historic Sites and Specialized Museums Within Overall Museum Marketplace	7
2.3 Regional Attraction Context	10
2.4 Comparables Analysis	13
2.5 Other Initiatives	22
<b>3. Existing and Potential Markets</b>	<b>25</b>
3.1 Existing Markets/Operations of MHP	25
3.2 Potential Markets	30
3.3 School Markets	33
3.4 Tourist Markets	36
<b>4. Recommendations/ Assumptions</b>	<b>39</b>
4.1 Core Recommendations	Error! Bookmark not defined.
4.2 Capital Improvements	Error! Bookmark not defined.
4.3 Programming	43
4.4 Operating Schedule	44
4.5 Admission Charges	44
4.6 Revenue Centres	45
4.7 Staffing and Volunteers	45
4.8 Marketing	45
4.9 Private Support	Error! Bookmark not defined.
<b>5. Next Steps</b>	Error! Bookmark not defined.
<b>Appendix A: Acknowledgments</b>	<b>A-1</b>
<b>Appendix B: Online Survey Results</b>	<b>B-1</b>
Last Visit	B-2
Recent Visitors	B-3
Non Visitors and Lapsed Visitors	B-11

# 1. INTRODUCTION

This chapter sets out the background to and purpose of this operations/business plan and projections study for Muskoka Heritage Place (MHP) as well as the scope of work and methodology.

## 1.1 BACKGROUND AND PURPOSE OF STUDY

The Muskoka region has a proud and important heritage and in 1957 the Rotary Club of Huntsville recognized that artifacts and buildings to reflect that heritage were being lost. Rotary members began to collect artifacts in an empty school building in 1958 and called it the Muskoka Museum. The Rotary Club then conceptualized and gained the support from Huntsville Town Council at the time for a pioneer village. In 1961 a 31-acre site was purchased with its own beaver pond off Brunel Road about one kilometer from Huntsville's downtown. Over the years Rotary acquired and relocated a variety of heritage buildings to create what was known for many years as Muskoka Pioneer Village. A main Museum building offering 5,540 square feet on two levels (2,770 sq. ft. per level) was constructed in 1966 at a cost of only \$12,800. The total exhibition space in the Museum is less than 1,500 sq. ft. with a gift shop of less than 500 sq. ft.

By 1971 a volunteer group known as The Friends of Muskoka Pioneer Village was organized to assist the Rotarians. Volunteers operated the site until 1981 when the first Director-Curator was hired. Three years earlier Rotary had transferred management of the Pioneer Village to the Town of Huntsville, which added 17 acres and two buildings to the site to reflect a pioneer crossroads community as it was between 1860 and 1910. ***A condition agreed by the Rotary Club and the Town was that the site will remain a pioneer village or park in perpetuity.***

In 1984 the Huntsville and Lake of Bays Railway Society was formed, comprised of volunteers dedicated to the restoration, maintenance and enjoyment of antique rail systems. This ultimately led in 1997 to the addition of 66 acres to facilitate the laying of about one kilometer of rail track from the Rotary Village Station along the shore of the Muskoka River to the edge of Fairy Lake for the addition of the Portage Flyer train, which was originally operational from 1904 to 1958 and debuted at MHP in 2000. With the train the Muskoka Pioneer Village name was changed to Muskoka Heritage Place.

Enhancements to the Village portion of the site included a small food service outlet in the barn for light lunches, a First Nations static display in the Museum and associated onsite encampment, as well as the "Muskoka at War" exhibit, and the "Muskoka Creative" exhibit.

During the 50<sup>th</sup> anniversary in 2008, First Nations Story Teller Mondays were added to the programming offered. In 2010 the train station was relocated to offer a better view of the Muskoka River and provide easier accessibility.

In addition to the Museum, there are now 16 buildings on site plus five open-air areas of interest including the First Nations Encampment and paddock. The site includes 37 parking spaces and opportunities for visitors to park at the neighbouring Canada Summit Centre or High School during peak periods.

Muskoka Heritage Place achieved its highest attendance at over 14,000 in visitors in 2007. However, with operating costs substantially exceeding earned and private income and with the recession of 2008-2010, staffing, programming and other operating cost reductions were implemented. In 2009 trains did not operate due to the construction of the G8/Canada Summit Centre, which caused a substantial decline in attendance. In the most recent three years, combined annual attendance levels at Muskoka Heritage Place have been in the 11,000 visitor range.

**In late 2016 the Town of Huntsville issued a Request for Proposals intended to maximize the potential of the site within the context of a legal requirement that it remain a pioneer village or park. This therefore precludes any opportunities for identifying a concept that might be substantially different from what Muskoka Heritage Place is today. Although there is to be application for capital funding from the Ontario Trillium Foundation, the objective of the planning process is not revolutionary but rather evolutionary change. It is to help increase awareness levels and community impact as well as higher attendance and non-Town revenues and therefore on development of implementable recommendations that reflect community input and the expertise of the consultants.**

After a competitive bidding process, Lord Cultural Resources was selected to conduct the study. The Lord Cultural Resources study team is led by Ted Silberberg, Senior Principal responsible for Market and Financial Planning, Vice President and historian Brad King, Senior Consultant Sarah Hill, and Research Consultants Rebecca Frerotte, Maureen Marshall and Kevin Valbonesi.

## 1.2 SCOPE OF WORK AND METHODOLOGY

In order to meet the objectives of this study we have carried out the following work elements. We:

- Reviewed and analyzed background material provided to us as well as additional data that we gathered.
- Toured the Muskoka Heritage Place site and facilities, Canada Summit Centre, Active Living Centre and other areas near the site.
- Facilitated a Visioning/Assumptions Workshop with a Steering Committee of Town elected officials and municipal staff, followed by an evening public meeting/open house attended by about 60 persons. We also conducted external interviews. Please see Appendix A, which acknowledges those who took part in the workshop and interviews.

- Developed a survey to test likes and dislikes and additional suggestions regarding the future of MHP. There were 351 respondents. Please see Appendix B for detailed survey findings with key findings and implications in Chapter 3.1 and throughout this report.
- Reviewed a brief to the consultants prepared by the Rotary Club of Huntsville, *Muskoka Heritage Place, Sustainability Study* (January 10, 2017)
- Conducted a contextual analysis to establish benchmarks for historic sites and specialized museums as well as research regarding selected heritage villages in comparison to the existing MHP operation. These analyses are set out in Chapter 2.
- Developed a more detailed analysis of data and interview feedback regarding the existing MHP market and operation as well as of potential resident, school and tourist markets for Huntsville and Muskoka, as set out in Chapter 3.
- Prepared this Phase 1 report, which detailed the analyses, conclusions and recommendations of this study. The recommendations were presented to a meeting of the General Committee and a subsequent public meeting on March 29, 2017 attended by about 45 persons. Feedback from those meetings and subsequent direction from the Town on which recommendations should be assumed for implementation in the short, medium and long terms, served to result in finalized assumptions. These formed the basis for the capital cost estimates and the attendance, operating revenue and expenses in Chapter 5 of this draft final report, which is to be presented to a meeting of the General Committee, and open to the public, scheduled for the morning of June 28, 2017.

***Bold italics are used throughout the document to highlight key findings, conclusions and recommendations.***

## 2. CONTEXTUAL AND COMPARABLES ANALYSES

This chapter seeks to learn from the experience of similar institutions in order to inform operational and business planning recommendations for Muskoka Heritage Place (MHP) and to establish a realistic context for subsequent attendance, operating revenue and expense projections. It begins with consideration of available data regarding historic sites and specialized museums within the overall museum marketplace and also includes information regarding the experience of five similar institutions.

### 2.1 THE REALITIES OF THE MUSEUM MARKETPLACE

It is the objective of this project to help boost attendance and earned income levels of Muskoka Heritage Place and to create conditions for more private support. At the same time it is essential that there be a realistic definition of success that reflects the realities of a marketplace in which museum-related institutions in Canada require substantial support from government sources. Data from Ontario, Canadian and US surveys are compared to data for Muskoka Heritage Place. More detailed information regarding MHP are set out in the following chapter.

- **On-Site Attendance:** MHP has reported in the range of 11,000 annual visitors over the past three years. This is substantially lower than the median and average figures for Ontario, Canadian and US museums. In part it reflects a seasonal operation, limited capital investment in the visitor experience and a limited staff, volunteer base and operating budget, as well as other factors discussed in this report.
- **School Groups as Percentage of Total Visitors:** MHP reports that about 9% of its visitors arrive in school groups. This is within the 7-12% school group range in the following table.

- **Memberships and Member Visits:** MHP has a membership program that offers unlimited access to the Village, Museum and trains. Rates vary from \$43 plus tax for individuals, \$135.60 plus tax for families and a variety of other membership categories. However, it reports only four paid memberships in 2016, compared to three in 2014 and one in 2015. Although the figures in the following table are for members as opposed memberships, *the data indicate virtually no interest in becoming a member of MHP, whether for the value for money received in unlimited repeat visitation and discounts or to support the mission of the institution or civic pride.* Our recommendations associated with membership are set out in Chapter 4.
- **Staffing and Volunteer Levels:** MHP reports two full-time staff, supported by 14 part-time or seasonal staff, three regular volunteers and 12-15 periodic volunteers, primarily as train volunteers. In 2000, MHP operated with the same two full-time staff but also 8 part-time staff and 24 volunteers<sup>1</sup>. In the 1990s it was reported that MHP was supported by 40-50 volunteers. *The data indicate a decline in substantial volunteer support. While it may be challenging to increase staffing levels it is imperative that there be more volunteer support for MHP. This issue is discussed further in Chapter 4.* It must be recognized, however, that the trend in Canada has been a decline in the percentage of Canadians who volunteer their time to any cultural or recreational organizations, as reported in the Canadian Index of Wellbeing.<sup>2</sup> On the other hand, the increasing retirement and longevity of the large baby boom generation should increase volunteer levels in the coming years.
- **Sources of Operating Revenue:** Earned income levels at MHP are at about 38% of its operating budget which is about the same as the 37% for Canadian museums. As is the case with most museums in Canada, the largest source of operating funds for MHP is from government sources at over 62% of the total, primarily from the Town of Huntsville (close to \$181,000 in 2016) with almost no support from private donations and sponsorships. *This study seeks to increase attendance and earned income levels and to maintain or ideally somewhat increase Town support for MHP on the basis of meeting wider community needs and to also identify the basis for more private support.* Specific recommendations are set out in Chapter 4.
- **Operating Budget and Sources of Operating Expenses:** Excluding amortization and the cost associated with this study, the annual operating budget for MHP is about \$337,000 and has been in this general range for the past five years. This is substantially lower than the median and average figures for medium sized museums in Ontario, Canada and the United States set out in the following table. Staffing costs in both Canada and the United States are generally in the range of 50% of total operating costs. For MHP, staffing costs are at close to 76% of the total operating budget. This percentage clearly does not reflect over-spending on staffing but rather under-spending in other expense categories. Regarding marketing costs, these are shown as 0% for Muskoka Heritage Place on the following comparative table but in fact the marketing of MHP is provided by the Town and not billed to MHP

---

<sup>1</sup> The figures for 2016 are from the survey form completed by MHP and the figures for the year 2000 are from a brief prepared by the Rotary Club of Sudbury.

<sup>2</sup> <https://uwaterloo.ca/canadian-index-wellbeing/>



## REALITIES OF THE MUSEUM MARKETPLACE - ONTARIO

	Muskoka Heritage Place	Small Ontario M&AG	Medium Ontario M&AG	Large Ontario M&AG	All Ontario M&AG	Canadian Museums	All US Museums
Sample Size		253	160	41	454	1,088	671
On-Site Attendance	11,000	4,063	17,869	206,535	27,213	23,019	26,500
School Groups as % of Total	9.4%	7.4%	9.0%	6.6%	7.2%	8.5%	12.3%
Members	4	56	253	6864	740	374	795
Total Full-Time Staff	2	0	3	44	5	4	7
Total Part-Time Staff	14	1	6	37	6	7	5
Total Volunteers	15	21	66	235	56	49	65
Earned Income as % Total	37.8%	47.3%	33.3%	39.1%	38.6%	37.0%	27.6%
Government Sources %	62.1%	27.1%	45.9%	45.8%	45.4%	49.4%	24.4%
Private Donations %	0.1%	24.6%	18.4%	13.3%	14.2%	11.4%	36.5%
Interest/Endowment %	0.0%	1.0%	2.4%	1.7%	1.8%	2.3%	11.5%
Total Operating Revenue	\$336,723	\$45,838	\$423,913	\$11.5 million	\$1.2 million	\$838,000	\$1.2 million
Staffing	75.7%	30.7%	50.8%	44.5%	45.0%	47.3%	49.9%
Occupancy	10.0%	12.6%	10.0%	11.8%	11.6%	13.1%	N/A
Collections Care	0.1%	N/A	N/A	N/A	N/A	N/A	8.0%
Marketing	0.0%	3.9%	3.3%	3.8%	3.7%	3.5%	4.1%

Source: 2013 Canadian Heritage Survey (2015) and 2013 Special Report on Museums & Art Galleries by Size and Province/Territory (2015) and 2009 Financial Survey of American Alliance of Museums.

Data for MHP are for 2016 and exclude amortization and the cost of the feasibility study

Note: Museums categorized as small have annual revenue of under \$100,000; medium \$100,000 to \$999,999; large \$1 million+  
Canadian figures represent averages and US figures medians

## 2.2 HISTORIC SITES AND SPECIALIZED MUSEUMS WITHIN OVERALL MUSEUM MARKETPLACE

With both a heritage village and train operation, Muskoka Heritage Place would be categorized as both a historic site and a specialized museum. There are no published Canadian datasets that allow for comparisons of various types of museum-related institutions but there are US data. Although the most recent US comparative data are now quite dated, the 2009 Financial Survey of the American Alliance of Museums (AAM) is nonetheless useful in this analysis, particularly as related to attendance and earned income levels. Among highlights of the data and potential implications are the following points:

- **Some Museum Types Tend to Attract More Visitors than Others:** Historic sites and specialized museums tend to be less appealing to a mass market than science and children's museums. The data for historic sites are skewed by the fact that many are small and under-funded while most "specialized museums" tend to attract niche, enthusiast markets. A train ride attraction has somewhat wider appeal but the short duration of the Portage Flyer experience is a very limiting factor.
- **Earned Income Levels Vary by Museum Type As Well.** Median figures for US historic sites indicates that 32% of operating revenues are from earned sources, with 33% for U.S.

specialized museums, compared to 48% for children's museums and science museums. This study has recommended a greater focus on programming for younger children. Noteworthy is that the reported nearly 38% earned income for MHP is higher than the overall US museum median of 28% earned income. The data are very useful to dispel the myth that American museums and related institutions are more entrepreneurial than their Canadian counterparts and also helps to establish a context for consideration of the existing and potential earned income performance of Muskoka Heritage Place.

- **Marketing Expenditures per Visitor:** The average U.S. historic site and specialized museum both allocated about 4% of operating budgets to marketing, which is the same as the overall museum average. MHP does not have a marketing budget, instead relying almost solely on word of mouth and social media and central marketing services provided by the Town of Huntsville. The relationship between earned income and marketing is cyclical. More earned income will help to generate income to pay for additional marketing while increased marketing expenditures will help to boost attendance and earned income. *However, in our judgment, marketing is not the primary issue facing MHP, and the Village in particular. Of greater importance, as set out in this report, are the visitor experience, pricing and human resources.*

2009 AAM Profile	Art Museum	Children's or Youth Museum	General Museum	Historic Home or Site	History Museum or Historical Society	Living Collections	Natural History or Anthropology	Science or Tech	Specialized Museum	Overall 2009 Survey	Overall 2006 Survey
Sample Size	156	18	71	89	190	17	32	25	73	671	809
Median Attendance	44,878	130,870	58,500	11,700	10,000	208,574	58,176	357,103	22,000	26,500	33,446
% Charging Admission Fees	47.6%	94.1%	63.2%	77.4%	49.2%	64.3%	63.3%	96.0%	57.1%	59.0%	60.7%
Median Adult Admission Charge	\$8.00	\$7.50	\$7.00	\$6.00	\$5.00	\$8.00	\$8.00	\$10.00	\$7.00	\$7.00	\$6.00
Median Operating Income	\$2,379,176	\$1,729,532	\$1,930,895	\$350,000	\$260,000	\$3,072,452	\$3,256,810	\$7,857,138	\$602,080	\$1,168,559	\$850,000
Average Earned Revenues	21.5%	48.3%	24.8%	31.7%	24.0%	30.0%	31.1%	48.8%	33.2%	27.6%	31.0%
Average Revenues from Private Donors	46.6%	27.8%	33.7%	34.6%	31.0%	20.3%	38.3%	28.9%	37.7%	36.5%	35.2%
Average Revenues from Investment Sources	18.6%	12.1%	8.8%	10.7%	8.5%	14.3%	6.4%	3.0%	9.3%	11.5%	9.6%
Average Revenues from Government Sources	13.3%	11.7%	32.6%	23.0%	36.4%	35.4%	24.2%	19.3%	19.9%	24.4%	24.1%
Median Value of Endowment	\$9,744,500	\$414,875	\$2,539,870	\$1,202,817	\$526,500	\$14,253,806	\$5,078,964	\$1,829,599	\$2,526,508	\$2,825,075	\$1,580,537
Median Earned Income per Visitor	\$8.21	\$6.31	\$7.16	\$9.44	\$4.39	\$4.87	\$6.76	\$11.14	\$10.00	\$7.22	\$5.91
Median Operating Expenses	\$2,317,675	\$2,522,615	\$1,798,754	\$298,200	\$262,206	\$3,630,530	\$3,237,600	\$6,827,362	\$778,859	\$1,166,000	\$829,037
Operating Cost per Visitor	\$49.94	\$15.07	\$30.21	\$28.33	\$26.73	\$15.10	\$29.74	\$20.95	\$32.25	\$31.40	\$23.35
Staff salaries as a % of total expenses [Median]	48.6%	54.5%	53.5%	56.0%	50.8%	63.9%	60.8%	45.8%	39.9%	49.9%	50.9%
Collections care as a % of total expenses [Median]	6.4%	4.1%	9.9%	4.9%	8.5%	26.7%	17.3%	1.2%	10.0%	8.0%	9.4%
Marketing Budget as a % of total expenses	4.4%	8.4%	5.4%	3.8%	2.2%	4.1%	4.5%	7.5%	4.0%	4.1%	4.4%
Marketing Expenses Per Visitor [Median]	\$2.15	\$0.93	\$1.61	\$1.14	\$0.50	\$0.85	\$1.22	\$1.32	\$1.00	\$1.29	\$1.05

Source: 2009 Museum Financial Information, American Association of Museums, 2009

## 2.1 2.3 REGIONAL ATTRACTION CONTEXT

Within the Muskoka region there are a variety of other museums and related attractions that help to establish context for the opportunities and constraints associated with Muskoka Heritage Place. Based on a previous analysis conducted by Lord Cultural Resources, this section of the report provides an understanding of the attendance, market, operational and financial features of selected attractions.

### 2.3.1 Muskoka Steamships and Discovery Centre

While MHP combines a heritage village and train experience, the Muskoka Steamship Discovery Centre (formerly Muskoka Boat and Heritage Centre) in Gravenhurst combines steamship cruises and a museum facility. The cruises attract about 35,000 passengers per year during the six-month operating season, about one quarter of whom take advantage of value added free admission to also attend the Discovery Centre. Previously, a cruise ticket only provided for a 50% discount and the impact was far less substantial. The total conversion rate for cruise passengers to a free admission museum at about 25% may be compared to 2% when a 50% discount was offered.

The shift in the name to Discovery Centre reflects an effort to increase appeal to children. This study has made the same recommendation for MHP. The large majority of visitors for the steamship cruises and the Discovery Centre attend in the summer months of July and August. This is unsurprising as Gravenhurst and the Muskoka area, including Huntsville, have long been known as a summer holiday destination with a substantial tourist and seasonal resident population.

Whereas the steamship operation is profitable, the Discovery Centre, like all other museum related institutions, requires operating support from government and private sources. This includes an annual grant of \$130,000 from the Town of Gravenhurst as well as provincial and federal grants.

### 2.3.2 Other Museums, Attractions, Events and Festivals

Other museums and related attractions in the region include:

- Bala's Museum with Memories of Lucy Maud Montgomery, Bala
- Bethune Memorial House NHSC, Gravenhurst
- Dorset Heritage Museum, Dorset
- Muskoka Lakes Museum, Port Carling
- Muskoka Rails Museum, Bracebridge
- SS *Bigwin*/ Lake of Bays Marine Museum
- The Tree Museum, Gravenhurst

All attract modest numbers of visitors and almost all are seasonal operations. Noteworthy is that, as originally suggested by MHP, the museums listed above formed a Muskoka Museums group. Each member contributes \$100 per year to support modest advertising and they meet four to five times per year to discuss opportunities for collaboration.

Two of the main attractions in the region are as follows:

- **Santa’s Village** – is the oldest and the highest attended attraction in the Muskoka Region. It is marketed as Santa’s one and only Canadian summer home where visitors can meet and chat with him all summer long. The Village operates during the peak 12-week summer season and offers a family friendly experience with a roller coaster, riverboat and train rides, merry-go-round, petting farm, splash pad, beach, playgrounds, inflatable bouncers, arcade, paddle boats, go-karts, tree-trekking and a zipline, some of which is included in the park admission charge and some surcharged. The basic admission charge is \$34.95 for all visitors aged 3 and older, but numerous discount opportunities are offered. Some 50% of visitors receive one discount or another and the after-discount per visitor revenue totals \$27.50. Santa’s Village attracted about 87,000 visitors in 2016, compared to 86,000 and 65,000 the previous two years during its summer operating season. This is lower than the 100,000 visitor level the site enjoyed in previous decades and was said to reflect a general decline in Muskoka tourism.
- **Johnston’s Cranberry Farm** – is one of only three commercial cranberry farms in Ontario, the second is Iroquois Cranberry Growers also on the outskirts of Bala, and the third is in rural Ottawa. Johnston provides year-round activities for visitors, including an award-winning winery, attracting 30,000 people each year, although most come in the fall for the harvest.

The seasonal nature of tourism in the region is seen by the following calendar of festivals and events in Muskoka, the large majority of which are held in the summer months. The following table provides an indicative annual calendar of local events and festivals<sup>3</sup> and **suggests additional opportunities for MHP to tie into the Huntsville focused events**. Noteworthy is that the Town of Huntsville pays the Huntsville/Lake of Bays Chamber of Commerce an annual fee for service of \$50,000 for event marketing (including creation and implementation of events such as Girl Friends Getaway Weekend) in addition to \$34,000 annually for tourism services.

January	Winterfest, Gravenhurst Fire & Ice, Bracebridge
March	Maple Syrup Festival, Deerhurst, Huntsville
April	Muskoka Home Builders Show, Gravenhurst Muskoka Maple Festival, Huntsville
May	Festival of the Falls, Bracebridge Muskoka International Air Show, Gravenhurst Muskoka 2-4 Craft Beer Festival, Huntsville Big East River X, Huntsville Spin The Lakes, Huntsville/Lake of Bays June: 24 Hour River X, Huntsville Band On The Run, Huntsville TriMuskokan Triathlon, Huntsville

<sup>3</sup> ExperienceMuskoka.com

<b>July</b>	<p>Canada Day Fireworks (many communities)          Rotary Dock Fest, Huntsville          Ironman 70.3 Muskoka, Huntsville/Lake of Bays          Annual MacTier Big Weekend Festival          Muskoka Arts and Crafts Summer Show, Bracebridge          Muskoka Antique Show, Port Carling          Annual Antique and Classic Boat Show, Gravenhurst          Muskoka In-Water Boat &amp; Cottage Show &amp; Muskoka, Gravenhurst          Ribfest, Gravenhurst          Nuit Blanche North, Huntsville</p>
<b>August</b>	<p>Dockside Festival of the Arts, Gravenhurst          Gravenhurst Ultimate Cottager Triathlon          Art in the Heart, Bracebridge          Muskoka Craft Beer Festival, Bracebridge          Muskoka Independent Film Festival, Rosseau</p>
<b>September</b>	<p>Antique, Classic &amp; Custom Car Show, Huntsville          Feast To Harvest, Huntsville          Culture Days, Huntsville</p>
<b>October</b>	<p>North Words, Muskoka Literary Festival, Bracebridge          Muskoka Autumn Studio Tour          Bala Cranberry Festival, Bala</p>
<b>November</b>	<p>Girl Friends Getaway Weekend, Huntsville          Santa Claus Parade, Huntsville          Santa Claus Parade, Gravenhurst</p>
<b>December</b>	<p>Santa Claus Parade, Bracebridge</p>

## 2.2 COMPARABLES ANALYSIS

Pioneer villages and other heritage sites are generally not as successful as they were in the past. This includes major sites like Colonial Williamsburg. Data from the National Endowment for the Arts, *Survey of Public Participation in the Arts* (1982, 1992, 2002, 2008, and 2012) indicated that in 2012 some 24% of Americans age 18 or older had attended at least one historic site over the past year compared to 35% who did so in 1982. The decline has been regular over the years and was largest in the 25-44 age category most likely to have young children and to be motivated to attend museums or other attractions they perceive to be of interest to their children, nieces or nephews. ***The data point to the reality that it is not just what MHP does or does not do that influences its attendance but also a general societal trend in North America. This study seeks to address what MHP can do and includes recommendations to widen appeal to children.***

Every museum and heritage site is unique and therefore seeking to identify comparable institutions that offer a substantial level of comparability is not easy, particularly when Muskoka Heritage Place combines a Pioneer Village, including a Museum and a train attraction. The following five examples were identified to offer reasonable comparability are as follows, in alphabetical order:

- Country Heritage Park, Milton
- Fanshawe Pioneer Village, London
- Founders Museum and Pioneer Village, outside Thunder Bay
- Lang Pioneer Village, outside Peterborough
- Westfield Pioneer Village, outside Hamilton

Descriptions of each is followed by a summary data table and assessment of potential implications to Muskoka Heritage Place.

### 2.4.1 Country Heritage Park

Country Heritage Park is an 80-acre site located within the Niagara Escarpment Plan Area in the Town of Milton. The site was opened in 1979 as the Ontario Agricultural Museum as an agency of the Ontario Ministry of Agriculture. When operated by the Ontario government there were approximately 55 full-time staff, and many more contract staff and summer students. The province decided to close the site given the level of financial support that was required to maintain it and after a heritage assessment was completed in 1998 that concluded the site was of limited heritage value. The site was sold at a nominal price to an organization comprised of private agricultural organizations, companies and community groups, Country Heritage Experience Inc, on the condition that a Heritage Conservation Easement be placed on the property by Ontario Heritage Trust and ensure its continued heritage character.



via Wikimedia

Today the site is known as Country Heritage Park and run by Heritage Experience, a charitable not-for-profit corporation which was established for the purpose of operating and managing it. ***Country Heritage Park is no longer open to the general public except for periodic public events on weekends when corporate, weddings, school tours and other private events are not scheduled.*** When public events take place they are charged at \$10 per adult with free admission for children under 12. The events are held in one of two barns, the fairgrounds or park. The 2017 calendar includes 17 weddings, 18 other private events, 14 public event days, of which three days are the Spring Craft Show and three days for the Summer Fair and Farm Expo. It is also available for school programs and summer camps.

The school tours offered are linked to Ontario curriculum requirements for kindergarten through to grade 7. School programs are offered for between \$7.45 and \$12.00 per student for half-day to full-day offerings serving approximately 12,000 students each year. Adult programming workshops are also offered, as well as summer camps and guided tours on special events days.

The annual income from admission to weekend events is less than 10% of the Parks total revenue. School tours, summer camps and private tours account for another 20% of the total revenue. Private donations and government grants and rentals make up the remainder of the income. Rentals are particularly important. This includes not only weddings and events but rental to a Montessori school and movie-shoots. The park is intending to sell off items in its collection of which they have multiples in the future through public auction.

Country Heritage Park operates with a staff of six persons 3 full-time staff, 1 part-time contract staff, 2 part-time contract staff and 3 summer students, The staff are a CEO, Accountant, Office Manager, Special Projects Coordinator, Volunteer Coordinator and Wedding/Events Coordinator and has private support from several agricultural companies.

## 2.4.2 Fanshawe Pioneer Village

Fanshawe Pioneer Village was founded in 1959 as part of the Upper Thames River Conservation Authority in London, Ontario. As with other pioneer villages it was created in part to help save heritage buildings in areas prone to flooding and to create a place in which the public could learn about their heritage.



via Wikimedia

Fanshawe Pioneer Village was operated by the Upper Thames River Conservation Authority from its founding until 1990, when a separate not-for-profit the London & Middlesex Heritage Museum was created to manage the site. Between 1990 and 2005 it was a struggle to establish and maintain the organization and site. In 2005 Fanshawe began a capital campaign and master plan, and working to secure long-term sustainable funding.

The mission statement is as follows: "Fanshawe Pioneer Village is an interactive museum committed to preserving the past and actively engaging our community in living history experiences." Fanshawe Pioneer Village works in conjunction with Museum London and the Museum of Ontario Architecture to tell the history of the region, with minimum crossover between the segments interpreted at each site.

The collection consists of 33 historic buildings and 40,000 artifacts, including horse drawn vehicles as well as a Ford Model T car but do not have any railroad history related vehicles on



site. The site includes the Sprite Family Visitor Centre which includes a small introductory exhibition, administration offices, collections repository and a gallery space that is used as a multi-purpose room including use as a rental facility and a location for temporary exhibitions. School programming is offered within the village and not in the Visitor Centre.

Educational Programming is offered from April to December and ranges in price from \$6-\$12 per student for half-day to full-day programs. School programs have been developed for grades JK-3, 6-8 and 10. There are also options offered for adult programming. Parking is free.

***Noteworthy is that Fanshawe charges \$7.00 per visitor over the age of three, which is substantially lower than the charge for the Village alone at Muskoka Heritage Place.*** The onsite experience for visitors includes guided tours, summer day camp for children 6-12 and costumed interpretation across the site. Costumed interpreters are present throughout the public season- May to October during which the village is open Tuesdays through Sunday and Holiday Mondays 10am-4:30 pm. During the Fall/Winter Season the site is open Tuesday to Friday 10 am to 3:30 pm. When not open to the public as a pioneer village the site and adjacent conservation authority lands can still be accessed. The site is only completely closed to the public for around 2 weeks per year when the conservation authority (the surrounding property) is closed. Membership Categories are: Family Pass (2 adults and up to 4 children under 16 years) \$50, Single Pass \$15, Couples Pass (2 visitors) \$30, members receive free admission, newsletter and advance e-mails on events.

***In 2016 Fanshawe Pioneer Village attracted 43,000 visitors and had 112 paid memberships.*** An additional 88 memberships were donated to community groups for fundraisers or other philanthropic purposes.

During the course of the year Fanshawe Pioneer Village hosts over 20 special events, the most popular of which are the Halloween theatre event, "A Visit with St. Nick," 1812 Reenactments and a farm-based agricultural fair. Each of these are targeted to different demographic segments but are successful. There are also 4 venues available for rental on site, prices vary based on the number of facilities being used.

Fanshawe operates with a full-time staff of six supported by 20-25 seasonal and part-time staff and 125 volunteers. Its total operating budget is close to one million dollars, primarily from government sources.

### 2.4.3 Founders' Museum and Pioneer Village

The Founders' Museum & Pioneer Village is located in Oliver Paipoonge, a short distance from the City of Thunder Bay. It was opened in 1970 as an idea of a Grade 3 teacher in Thunder Bay, Frederick Fraser Goodfellow, who wanted a better way to teach children about pioneer days. He purchased the property in 1960 with the aim of creating a "hands-on history" experience, he sourced the items from farms and homes to build the collection. The Pioneer Village invites visitors to: "Come Touch History in this unique Northwestern Ontario Pioneer Village."

According to staff at the Founders' Museum and Pioneer Village the site was a popular and well run attraction until 2010, with between 6,000 and 7,000 annual visitors. In 2010 key personnel departed from the Pioneer Village, bringing in new individuals to the Volunteer Board and management of the site. High debt, and instability resulted in the resignation of the volunteer board and takeover by the municipality of Oliver Paipoonge in April of 2014. The museum & village reopened in August of 2014.

Most of the buildings come from communities in the surrounding 20 miles, or are replicas of buildings from the same radius. The collection of 13 buildings is supplemented by antique cars, tractors, farm equipment, engines and motors. There is also a large machine shop on site that is not open to the public where repairs are made to onsite equipment. The main hall can accommodate up to 120. Parking is free. The site is used for wedding and event rentals but this is managed through the municipality not the museum. The hall is also used for events and educational programming, emphasizing the importance of multi-purpose spaces. This has been recommended for MHP as well. The Jail is the most popular building on the site with a costumed interpreter acting as the Sheriff and “arresting” visitors.

Educational programming is offered to school tour groups and in 2016 it attracted 10 such groups. Founders’ offers programs designed for grades 3-4 and 7-8. These programs are offered for \$5 per student, with teachers, chaperones, and drivers offered access at no cost. All students participating in the program receive informational booklets to take home. The program involves a tour, Q&A, and picnic style lunch either in the hall or gazebo, weather permitting.

The visitor experience can either be through guided or self-guided tours. Other onsite programming includes Halloween and Christmas craft sales, Kid’s Days with Magic shows, face painting, games, and prizes. Monthly Sunday services hosted onsite in church including afternoon tea, Music Events, Yard Sales, and Train Days. All events are free with admission, the most popular are those with music and the Yard Sale. The Yard Sale operates by having locals purchase a table to sell their items at, though visitors just shopping do not have to pay. **Annual visitorship in 2016 was approximately 2,500.** Events with more than 80 attendees are considered successes, those with less than 80 are not repeated.

Founders’ Museum & Pioneer Village is open from May-August, only on Friday, Saturday and Sunday from noon to 4:30pm. The opening hours prior to the municipal take over were Victoria Day to Labour Day, seven days a week, 11am to 5pm. During August of 2014 and the summers of 2015 and 2016 Founder’s offered free admission in order to welcome back community after the threat of its closure. In 2017 they will reintroduce admission fees at \$5 for adults, \$3 for seniors and students, \$1 for children and free for toddlers and infants. They do not currently offer a season pass, or membership but may consider it in the future. The annual operating budget for 2016 at Founders’ was only \$35,000 including 1 FT Staff person, 3 PT Staff and Summer Students. There are 80 active volunteers at Founders with 15-20 volunteering daily during the summer months.

Future plans include combining the Duke Hunt Historical Museum (also operated by the Municipality of Oliver Paipoonge) with the for Founders’ Museum & Pioneer Village and Wensick Automotive Museum together on the Founders’ museum property.

#### 2.4.4 Lang Pioneer Village Museum

Lang Pioneer Village Museum was established by the County of Peterborough in 1967 to celebrate and preserve the rural history of the area. Located on a 25 acre site along the banks of the Indian River, the Village Museum features more than 25 restored and furnished buildings constructed between 1825 and 1899 among a total of 37 buildings on site. The buildings originate from townships within the County of Peterborough. There are 18 original buildings that were moved to the site in 1967 and an additional 19 on site, some which are historically interpreted, and some which provide other facility services such as the Visitor Centre, Interpretive Centre, Picnic Shelter, and Food Booth. The Interpretive Centre was added in 1983, the grist mill and a number of other buildings had roofs fixed in 2006 through Industry Canada funding. In 2008 Lang added a cider mill, and in 2011 they opened the Jacquard Loom interpretation centre. In 2013 they added a workshop, based on a facility they saw at the Pickering Pioneer Village, where large agricultural artifacts are brought back to life for display. This building was established through federal funding.



Anne DeLong via Wikimedia

Since 1967, Lang Pioneer Village Museum's mission has been to preserve and authentically recreate the history of Peterborough County. Lang's collection is comprised of over 26,000 artefacts and features farm animals during the summer season. In 2017 a new barn will be constructed that will incorporate the Peterborough County Agricultural Wall of Fame as part of the 50th anniversary of Lang Pioneer Village Museum. This new facility will include a multi-purpose room, workshop, conservation lab and is a \$2.5 million expansion project.

The Visitor Centre at Lang Pioneer Village Museum houses two galleries. The Main Gallery previously held long-term exhibits and is currently closed to the public to be converted to an orientation theatre on the history of Peterborough County, European settler arrival and the impact on this had on the lives of the local First Nations population. This will be called "Aabnaabin" and is being created in consultation with Curve Lake and Hiawatha First Nations partners. Funding for this project is through the Celebration Ontario program. Some of the current exhibitions in this space will be moved to the new facility in 2017. The MacKelvie Gallery is a temporary gallery which shows exhibits related to special event themes or the works of local artists, photographers and craftspeople. The space is also used for public programming.

The Museum hosts a variety of annual events including Father's Day Smoke and Steam Show, Historic Dominion Day, Applefest, County Fair, Historic All Hallows' Eve, Christmas by Candlelight and various workshops. Daily afternoon tea is available onsite for an additional charge at the Keene Hotel (a-la-carte). Other visit add on packages include family photo sessions which can be pre-booked for the cost of \$295 plus HST and the Youth Interpreter Program, \$75 per participant for youth 12-17, a training program which teaches crafts, trades, public speaking and provides work experience through costumed interpretation.

Lang Pioneer Village Museum is open: May 23 to June 16- Monday to Friday 10-3, June 18 to September 4- Monday to Sunday 10-4, September 5 to 8: Monday to Friday guided tours 11am to 1pm (advance booking required), closed weekends, September to December- based on programming and events schedule.

The Museum offers a variety of wedding and rental options including for rehearsal, weddings and photographs (\$400), or photo only packages (\$50). The picnic shelter can be rented for \$100 per day, and the MacKelvie Room can be rented throughout the week (Monday to Friday) during operating hours (8:30-4:30) in the offseason (January to April). Site photography and filming bookings are also available.

The visitor experience at this living history museum includes costumed interpreters, demonstrations of chores, trades and pastimes, the village appears to visitors to be an authentic 19th century hamlet with scenic pathways, gardens and grounds. The Aabnaabin cabin offers interpretation including the history of the First Nations people that were living in Nogojiwanong prior to the arrival of settlers.

Curriculum offerings are currently tied to the Ontario Grade 3 Curriculum, but future plans include developing further program offerings related to the Jacquard Loom, and Indigenous interpretation, these future initiatives are tied to their strategic plan. School programming is offered year round with spring and summer programs taking place outside, and Fall and Winter programs being done in the MacKelvie Gallery.

***Annual attendance is about 20,000 with only a handful of season passes purchased each year. Noteworthy is that 7,500-8,500 of the annual attendance is during special events.*** Admission Charges (including tax) are: Adults \$8, Students and Seniors \$7, Youth 5 to 14 years \$4, Children under 5 years are free, Family Pass (2 adults and up to 4 youth) \$20. Special Event Admission Rates (taxes included) are: Adults \$10, Students and Seniors \$9, Youth 5 to 14 years \$6, Children under 5 years are free, Family Pass (2 adults and up to 4 youth) \$30. Price ranges from \$4 per student, a complimentary pass for the teacher and 3 adults (an additional charge of \$4 for each extra adult) to \$7.50 per student, complimentary passes for the teacher and 3 adults, and \$7.50 for each additional adult.

The operating budget of Lang Pioneer Village Museum is approximately \$1 million. About 81% is from government, primarily the local government. Other government funding is from CMOG, HRDC and Ontario Celebrates. About 18% is from earned revenues. Only about 1% or \$10,000 of the annual budget is from private donations as private support has been primarily directed toward their capital campaign. Lang has 200 volunteers who are active primarily on a weekend basis. The volunteers are organized into groups based on interest such as the workshop group, the Jacquard loom group, etc.

According to staff, the most successful parts of the Lang Pioneer Village relate to its partnership and connections with the community. Whether this be working with local craftspeople to bring skills in from the community to interpret and restore traditional crafts or close partnerships with the Curve Lake and Hiawatha first nations for the Aabnabin encampment. Wear and Tear causes high capital costs for the upkeep of 37 buildings. Succession planning is also a current key challenge as many long time staff are nearing retirement.

#### 2.4.5 Westfield Heritage Village

Westfield Heritage Village is owned and operated by the Hamilton Conservation Authority. The property was initially purchased in 1960 and opened in 1964 as Wentworth Heritage Village with seven heritage buildings. At the time of the founding it was run by volunteers. In 1968 the site was sold to the County of Wentworth and was eventually transferred to the newly established Regional Municipality of Wentworth. Facing financial difficulties, the site closed in 1984, and remained closed to the public for six years. During the time it was closed the Municipality negotiated for the Hamilton Conservation Authority to manage the site, and in 2016 the site was ultimately sold back to the Hamilton Conservation Authority for \$2 who renamed it Westfield Heritage Village. An additional parcel of land was added in 2016.

Westfield's collection consists of 35 historical buildings that have been relocated from sites around southern Ontario and restored to their original appearance. The total collection consists of approximately 25,000 artifacts with 35 vehicles including tractors and horse-drawn vehicles.

The village itself is 39 acres in size but the total woodland area is 500 acres. ***Westfield is still open to the public when the buildings are not open.*** A guided map of what the buildings are is available when the buildings are closed to provide historical context. To date there is no orientation space on the property but Westfield has completed a feasibility study for a visitors' centre and developed the concept for one.

The visitor experience on site includes both living history demonstrations and guided tours. The interpretation on site is divided into 5 different time periods.

Westfield reported annual attendance in 2016 at about 45,000 visitors. Members of the Hamilton Conservation Authority receive free admission to the Village. Public program rates for days the buildings are open are: Adult \$11.00, Seniors \$10.00, Disabled admission \$10, and Youth (6-17 years) \$6.50. A Family rate (includes 2 adults and 2 youth) is \$30.00. Non-Public Program Rates are: Adult admission \$4, Youth 17 years and younger are free and parking is also free.

Each year Westfield Heritage Village puts on 5 main events in addition to other smaller events. The five main events are the: Ice Cream Carnival, Telling Tales: A Family Festival of Stories, Haunted Halloween, T'was the Night before Christmas, and the Maple Syrup Festival. Smaller events that take place include textile day, Canada day celebrations and bread day. According to staff these five main special events are visitor favourites and have become annual traditions. The Village recently discontinued the practice of charging extra for events.

Yearly attendance to the events varies due to weather but these are still consistently attended. Other favourite parts of the visitor experience include the costumed interpreters, a non-operational restored locomotive and school house.

Educational programs are based on the Ontario Curriculum, the majority of school visits originate from Grade 3 classes but they also have students coming from JK through to Grade 6. They are currently working the First Nations partners to develop appropriate Indigenous programming that will be directed towards the Grade 7-8 curriculum.

The operating budget at Westfield is approximately \$800,000, of which 45% is from earned income and the remainder primarily from the Hamilton Conservation Authority and government sources. .

Facility rentals for events and weddings are very important. This includes a comprehensive wedding package price of \$1836 plus HST and includes a rehearsal, the Mountsberg Church for the wedding ceremony, Ironwood Reception Hall and Victorian Bandstand. Those wishing to take only photos on the property are charged \$250 plus HST. The site has also been used for filming television and movie series. Most recently the Netflix adaptation of Anne of Green Gables used Westfield for filming.

The Village operates with 5 full time staff, 1 part time employee and additional paid part time casual education and support staff. There are 40 volunteers on site most open days and for large events they will have 100 volunteers on site. Westfield has a pool of approximately 200 active volunteers that they pull from. Some volunteers have been there for 20+ years.

### 2.4.6 Comparables Data Table

	Muskoka Heritage Village	Country Heritage Park	Fanshawe Pioneer Village	Founders' Museum & Pioneer Village	Lang Pioneer Village	Westfield Heritage Village
<b>Location</b>	Huntsville, ON	Milton, ON	London, ON	Oliver Paipooonge, ON	Keene, ON Peterborough County	Rockton, ON
<b>Size</b>	114 acres	80 Acres	46 Acres	N/A	25 Acres	39 Acres
<b>Population (CMA)</b>	60,599 Muskoka	5,583,064 Toronto	474,786 London	121,596 Thunder Bay	123,270 Peterborough	721,053 Hamilton
<b>Admission Adult</b>	\$11.65 plus tax (Village only)	\$10 special event only	\$7	\$5	\$7	\$11
<b>Admission Child or Youth</b>	\$8.40 plus tax) Village	N/A	N/A	\$1	\$7	\$6.50
<b>Admission Senior/Student</b>	\$10.60	N/A	N/A	\$3	N/A	\$10
<b>Cost of School Programs</b>	\$13.50	\$7.45- \$12 /Student	\$6-\$12 / Student	\$5 /Student	\$4-\$7.50 /Student	\$5.50-\$11 /Student
<b>Number of Buildings</b>	17	18	33	13	37	35
<b>Artifacts</b>	60,000	20,000	40,000	N/A	26,000	25,000
<b>Interpretive Centre?</b>	Yes	No	Yes	No	Yes	No
<b>Annual Visitors</b>	11,000	N/A	43,000	2500	20,000	45,000
<b>Days a Week Open (Peak Season)</b>	7	Open for special events and school bookings only.	6 (Plus Holiday Mondays)	3	7	1 (Plus Holiday Mondays)
<b>Hours of Operation (Peak Season)</b>	10-4	Open always as Park	10-4:30	12-4:30	10-4	12:30-4
<b>Full Time Staff</b>	1.75	4	6	1	5	5
<b>Part Time Staff</b>		2	0	3	5	1
<b>Seasonal Staff</b>	14	3 Students	20-25	Varies	25	Varies
<b>Volunteers</b>	30	N/A	125	80	200	200
<b>Annual Operating Budget and Sources</b>	\$337,000, 38% earned, 62% government	N/A	Close to \$1 Million, primarily local government	\$35,000, primarily local government	\$1 Million, 18% earned, 1% private, 81% government	\$800,000, 45% earned, rest primarily from Conservation Authority (government)

## 2.4.7 Summary and Implications

Some key findings and implications to Muskoka Heritage Place of the comparisons with other pioneer/heritage villages are as follows:

- **Location:** Whereas the other pioneer villages are located in rural areas, Muskoka Heritage Place is in a residential area only one kilometre from downtown Huntsville. This creates an *opportunity for MHP to serve the role of not only a pioneer village, but also a public park*, as discussed further in Chapter 4.
- **Attendance Levels:** The data indicate relatively modest levels of attendance for all of the Villages compared, including those in much larger population centres than Huntsville. *The data confirm the need for realism with respect to potential attendance levels at MHP.*
- **Admission Charges:** The admission pricing data for each of the Villages above are lower than the admission charge for the Village alone at MHP, often by a substantial amount, and despite the fact that most of the villages include more buildings, programs and events. *Overpricing the Village at MHP lowers attendance, which in turn reduces support from volunteers who do not feel appreciated when there are few people on site.* Chapter 4 includes recommendations to modify the admission charges.
- **Operating Schedule:** The data suggest the need to *reduce open days and hours* for the Village to periods in which attendance levels are most likely to be highest, when available markets are most likely to be willing to pay for charged admission, and when volunteers are most likely to be available. Our recommendations are set out in Chapter 4.
- **Staff and Volunteers:** Like MHP, the villages operate with modest staff levels, but in all cases there is a larger volunteer base that is no longer present at MHP. *Strategies to increase volunteer support are crucial to the future of MHP.*
- **Operating Budgets and Sources:** With the exception of the Founders Museum and Pioneer Village outside Thunder Bay, all of the comparables have substantially higher operating budgets than does MHP and also substantial operating support from government sources, primarily local<sup>4</sup>. This study seeks to *maintain the financial support from the Town of Huntsville at current levels, or a modest increase, on the basis of meeting wider community needs.* The data also indicate a substantial focus on facility rentals for weddings and other functions as a primary source of operating revenue. Chapter 4 of this study has recommended a *much stronger emphasis on rentals* as well.

## 2.5 EVENT/PROGRAMMING PAVILIONS

One of the recommendations set out in Chapter 4 is for a covered outdoor pavilion to serve as a multi-purpose place for rentals and public and school programming. This section considers the experience of other heritage villages that have developed similar facilities.

---

<sup>4</sup> Despite requests for specific information regarding the sources of operating revenues, some of the institutions provided only general responses.



### 2.5.1 Har-Ber Village Museum, Oklahoma

The Har-Ber Village Museum is a pioneer-era village and history museum located on the shores of Grand Lake o' the Cherokees in Oklahoma. In 2014, thanks to a generous grant by a local family foundation, the museum renovated its existing Machine Shed into a 3,000-square-foot Event Tent. The motivation behind the project was to provide a covered space that can be utilized by numerous guests including community organizations looking for a beautiful setting to hold a meeting, a lunch location for large tour groups and special event receptions. The museum's event tent is a 40' x 80' pole barn with a wooden floor, stage and open air sides. It seats 150-200 guests and can be enclosed if needed.

The event tent is often used for community events organized by the museum such as the talent contest and country square dance. It is also available for rental at a cost of \$1,200 and is often used in conjunction with weddings at the village chapel (\$300) for a reception.



Source: Har-Ber Village, Facebook

### 2.5.2 Fort George National Historic Site, Niagara-on-the-Lake

Fort George is a reconstructed military fort which played an integral role in the defense of Canada during the War of 1812 and is a popular place for school groups. As a predominantly outdoor living history site, there was a growing need to provide a sheltered area for activity and to have lunch.

Built in 2014 outside the fort ramparts, the new \$1.1-million Agora pavilion is a year-round 2,992 sq. ft. indoor/outdoor education and activity area with capacity of up to 200 people.

The pavilion is a two-storey shelter featuring a unique contemporary design including a main floor with propane-fired fireplaces, which when necessary, can be completely enclosed to provide a unique setting for outdoor based events. A raised interior platform serves as a stage for interpretive space, and exhibits and areas under the earthwork provide storage. Picnic areas radiate from the existing covered tree canopy connecting to the exterior space of the pavilion.

The second floor of the Agora faces Queens Parade offering a view of the field re-enactments and an accessible rooftop view of the fort interior. It includes an overhead canopy to provide shade and shelter from the elements and boasts green-roof technology. Both floors are connected by a wheelchair-accessible ramp that allows a full view of the grounds.



Source: Courtesy of Parks Canada

### 2.5.3 Peterborough Museum and Archives

The Heritage Pavilion pictured below is located in Ashburnham Memorial Park next to the Peterborough Museum and Archives. It was originally built in the 1840s as a Methodist Meeting House. When it was demolished in 1996, the 150 year old roof trusses, posts, beams, wooden pegs and other materials were salvaged and re-constructed adjacent to the Museum in the Park. It is used as a rentals and programming venue.



Source: Peterborough Museum & Archives, Facebook

# 3. EXISTING AND POTENTIAL MARKETS

This chapter offers an analysis of existing markets for Muskoka Heritage Place (MHP) as well as potential resident, school and tourist market segments for Huntsville and Muskoka.

## 3.1 EXISTING MARKETS/OPERATIONS OF MHP

To plan for the future of Muskoka Heritage Place first requires an understanding of the attendance, market, operational and financial features of the existing MHP. The data are as provided by MHP and also reflect the feedback from respondents to a one-month survey of residents. Detailed results are in Appendix B and key findings below.

### 3.1.1 Review of Data Provided by MHP

- **Attendance Totals and Trends:** Attendance levels have been in the range of 11,000 visitors annually over the past three years, based on an almost exclusively seasonal operation. Only the very small museum building is open during the colder weather months and very few people attend. In 2016, some 6,683 of the 11,064 visits (60%) included a train experience. The data indicate that the train is the primary attraction, despite a very short 30-minute total experience, of which 14 minutes is on the train. The data also indicate relatively few visitors willing to pay for the full site experience, suggesting the weakness of the Village and Museum. This contrasts with responses from recent visitors participating in the online survey (summary below) who had predominantly visited the Village or whole site. However, most respondents were permanent residents of Huntsville and the Muskoka region, rather than tourists, which likely explains the deviation. Despite this, survey respondents recognized the importance of the train as a key component of the visit and for tourists. Seeking to increase attendance levels will require overcoming weaknesses in all of the three “p’s” – product, price and promotion, which are the primary factors underlying attendance. This study seeks to mitigate those weaknesses and build upon strengths of MHP.

MHP Attendance	2016	2015	2014
Museum Only	278	353	352
Village/Museum Only	1,759	1,741	1,891
Train Only	3,632	3,541	3,286
Full Site (Museum, Village and Train)	2,468	2,701	2,486
Special Event	2,167	2,249	1,997
Private Event	177	463	181
Promotional (includes train)	179	195	294
Children Under 3	404	250	262
<b>Total</b>	<b>11,064</b>	<b>11,493</b>	<b>10,749</b>

- **Paid Visitors:** MHP reports that 90% of visitors pay admission. These include both direct paid and indirect paid for those attending charged events on site. Free admission is offered to infants, caregivers, reciprocal admission participant attractions, and promotional pass holders as well as to an annual Easter egg and chocolate event that is free to all visitors on Easter Sunday. Attendees for weddings and functions are also able to experience the site free of charge.
- **Admission Prices:** The following table indicates the current admission charges. While it is recognized that these prices were set at a time when the level of programming on this site is much higher than it is today, but even considering that, the charges for the Village alone are substantially higher than those of other larger pioneer villages offering a better visitor experience. Although there are tour group prices, none are reported to have attended in 2016. The total combined admissions revenue in 2016 was about \$78,533 or about \$7.11 per visitor. *We have recommended changes to all ticket categories and charges in Chapter 4 to reflect the importance of higher attendance relative to higher admission charges that are perceived by the consultants and others, including on-line survey respondents, to be excessive for the product offered during most operating days.*

Price plus tax	Museum	Village	Train	Full Site
Adult (13-64)	\$2.50	\$11.65	\$5.95	\$17.20
Senior (65+)	\$2.50	\$10.60	\$5.30	\$15.50
Child (3-12)	\$1.55	\$8.40	\$3.65	\$15.48
School Group (per person)	\$13.50 (includes program)			
Tour Group (per person)	\$2.25	\$10.50	\$5.37	\$15.48

- Open Days and Hours:** The Village is open daily from May through October with open hours from 10 am to 4 pm. The train also has a May through October season with a Tuesday through Saturday operation. Excursions are offered each open day at 12, 1, 2, and 3 pm from Canada Day through Labour Day. During the rest of the season the same hours are offered on Saturdays but there is only one excursion per day at 1 p.m. on the other open days. Survey feedback highlighted the desire for more weekend hours for the train operation to maximize potential leisure and tourist visits. The Museum operates with the same hours as the Village during the May through October season and on weekdays during the rest of the year. However, very few people attend. This study has recommended changes to open days and hours as set out in Chapter 4.
- Event Days and Attendance:** The following table indicates the various event days at MHP in 2015 and 2016. The data indicate the substantially higher attendance at events that offer free admission (Easter Egg Hunt) or are very low priced; such as the annual October 31 Halloween event that draws at \$3.00 per person or \$10 per family. *These two days account for about 13% of total attendance, suggesting the popularity of special events and also resistance to paying the regular admission charges. Survey feedback reinforced the desire for more events, particularly family friendly events, to encourage increased interest and visitation from the resident market.*

Muskoka Heritage Place Special Events 2015 / 2016					
	Event Name	Event Date	Attendance	Details	Cost to Participants
2015	MHP & the Nutty Chocolatier Annual Easter Egg Hunt	Sunday April 5	700	Co- sponsored by MHP and the Nutty Cocolatier	Sponsor will only hold this event if it is free for the community to attend
	Live History Theatre	Saturday June 25	4	MHP Trial event	Regular Admission
		Sunday June 26	2		
	Canada Day Celebrations	Wednesday July 1	236	Additional activities & entertainment	Regular Admission
	Ghost walk	Saturday September 12	48	Co-Event with Andrew Hind & Maria DeSilva Authors	\$15.04 per person + tax
	Great Pumpkin Trail Hallowe'en Event	Saturday October 31	665	MHP Event	\$3.00 per person or \$10.00 per family
	Portage Flyer Christmas	Saturday December 19	884	MHP Event	\$4.42 per person (\$5.00 incl. tax)
	<b>Total 2015</b>		<b>2539</b>		
2016	MHP & the Nutty Chocolatier Annual Easter Egg Hunt	Sunday March 27	759	Co- sponsored by MHP and the Nutty Cocolatier	Sponsor will only hold this event if it is free for the community to attend
	Canada Day Celebrations	Friday July 1	158	Additional activities & entertainment	Regular Admission
	Ghost walk	Saturday September 17	42	Co-Event with Andrew Hind & Maria DeSilva Authors	\$15.04 per person + tax
	Great Pumpkin Trail Hallowe'en Event	Monday October 31	712	MHP Event	\$3.00 per person or \$10.00 per family
	Portage Flyer Christmas	Saturday December 17	696	MHP Event	\$4.42 per person (\$5.00 incl. tax)
	<b>Total 2016</b>		<b>2367</b>		

- **Origin of Non-School Visitors and Repeat Visitation:** The data indicate that only about 6% of visitors to MHP reside within a 100-km. radius of Huntsville. MHP is therefore a destination largely for tourists, with 51% reported to be from elsewhere in Ontario, 9% from elsewhere in Canada and a very substantial 34% as US or international visitors. A key issue here is that *MHP is intended to reflect the heritage of Muskoka but Muskoka regional residents are not attending in significant numbers. This includes very few visits by Huntsville taxpayers except during special events. The survey confirmed a desire for more community events to encourage more locals to attend.* Only 10% of visitors attend more than once per year.
- **Demographics of Non-School Visitors:** An estimated 55% of non-school visitors are female. This is in a common range for most museum types. However, the market skews older with 43% of visitors aged 65 or over and only 14% under the age of 13. *Since many adults attend museums and other attractions they believe will be of interest to children, this suggests the need for MHP to increase its appeal to the young family market. Survey results confirmed a desire for a more family friendly positioning, with increased focus on hands-on activity and living history interpretation to bring the experience alive for younger visitors.*
- **Marketing Weaknesses:** There is no signage for MHP visible from Highway 11 and Google Maps directs visitors to the site through residential areas as opposed to through the downtown. There is also no direct spending on marketing because marketing has been centralized to cover all municipal business. A separate marketing budget that would allow for collaboration with Muskoka Tourism and other agencies has been recommended in this study and confirmed through the online survey.
- **MHP Ranking on TripAdvisor:** Muskoka Heritage Place ranks fourth of things to do in Huntsville, trailing Sugarbush Hill Maple Farm, Arrowhead Provincial Park and Lions Lookout. There are 67 reviews over a period of 4 years and 35 rated MHP as excellent, 19 as very good, 2 as average and only one as terrible. For purposes of comparison Sugarbush Hill has 352 reviews over the same period. The positive comments reflect experiences when activity is taking place in the Village or being an engineer on the train. The main criticism of the train was that the experience was too short and there was no destination for the train.

### 3.1.2 Review of Survey Data

A public survey focusing on the current visitor experience at Muskoka Heritage Place was conducted from January 13<sup>th</sup> to February 11<sup>th</sup> 2017. The survey was available in hard copy and online.

A total of 351 responses were collected of which 303 (86%) were valid completed surveys. Approximately 64% of all respondents were permanent Huntsville residents, and 14% were other permanent Muskoka area residents. Therefore survey results predominantly reflect the behaviours and opinions of the resident market.

All survey participants were first asked to indicate when they last visited Muskoka Heritage Place, if at all. Most of the respondents had been in the last 12 months (44%), and 23% had visited within the last 1-3 years. For 26% of respondents, it had been more than 3 years since the last time they visited and 8% of respondents had never visited before.

The remainder of the survey was administered based on how respondents answered this question. A separate set of questions was asked of those who had been recently, with

questions that focused on their satisfaction with the visit and soliciting ideas for improvement in future. Those who had lapsed (more than 3 years) or who had never been before, were asked a different set of questions.

The following provides a summary of the key findings from the online survey. The more detailed results can be found in Appendix B.

- **Enthusiasm for and Interest in Muskoka Heritage Place from a Select Group** – Such a high response rate from a relatively small community shows a substantial level of interest in the future of MHP. However, responses represent a select and already familiar group of permanent Huntsville residents, and when compared with attendance data realities, shows that this enthusiasm and tendency to visit does not seem to be translating to the wider community.
- **Reconsideration of the Admissions Policy** – Findings suggest there is a need to reconsider the admission pricing and structure for MHP.
- **Improving the Overall Product is Priority for Improvement** – There is a serious gap between the importance that visitors place on experience elements and amenities at MHP and their satisfaction with all elements. Results from the survey show satisfaction gaps on all aspects of the visitor experience, but point to two key areas to focus initial improvements – providing more interpretation and information, and increasing the number and variety of things to do while at MHP. This is further reinforced by visitor comments. Top suggestions for improvement include:
  - The need for a more immersive experience
  - Having living history interpreters in period costume providing tours, demonstrations, and personal interaction and information
  - More period appropriate hands-on activities
  - Opportunities to access information on self-guided visits or when interpreters are not present
  - More year-round local events
- **The Train is an Important Part of the Visitor Experience Warranting Development** – For many, the train experience is a key motivation for their visit and a highlight of their experience. Some survey participants therefore wish for a longer and/or more interactive experience. However, for those who visit on non-train days, they are unable to participate in this activity at all and are left disappointed. Feedback suggests priority for reconsidering the scheduling of train operations. Comments highlight a need to have the train operational on both Saturday and Sunday.
- **Need for Increased Marketing and Promotion** – A key message throughout the survey responses was a need for better marketing and promotion overall so that local residents and tourists alike could know what the Muskoka Heritage Place was, what it offered and what events were on and when. Promotion also serves as a constant reminder and helps to keep an attraction front of mind. This is particularly important with those lapsed and non-visitors who indicated that the main reason for not attending MHP more often was that they were not aware of it/ forgot that it was there (30%). Signage and wayfinding was also considered an important part of promotion requiring improvement.

## 3.2 POTENTIAL MARKETS

This section considers available data and interview feedback associated with resident, school and tourist markets for Huntsville and the Muskoka District Municipality compared to provincial and national averages.

### 3.2.1 Potential Residents Markets

The only data that have been released from the 2016 census are population levels. In other categories the 2011 census data has been analyzed.

#### Permanent Resident Population

The permanent resident market for MHP has been defined as the Muskoka District Municipality (MDM) with the Town of Huntsville as the primary resident market. As seen in the following table the current MDM population is about 60,600 residents. The population of the Town of Huntsville is over 19,800, a growth rate of 8.4% that exceeded the growth of the Muskoka District but trailed provincial and national averages. *The resident market is modest relative to the residents of larger urban areas and convey the importance of tourist markets and the wisdom of the seasonal operation of MHP.*

Resident Population				
	2006	2011	2016	% Change 2006-2016
Huntsville	18,280	19,056	19,816	8.4%
Muskoka District Municipality	57,563	58,047	60,599	5.3%
Ontario	12,160,282	12,851,821	13,448,494	10.6%
Canada	31,612,897	33,476,688	35,151,738	11.2%
<i>Source: Statistics Canada, 2016 and 2011 Census</i>				

Projections of population growth prepared for the Muskoka District Municipality by Watson Associates Economists in 2013 indicated a growth of 6,400 residents in Huntsville by the year 2041. The projections were for the Muskoka District to grow by about 22,000 to 2041.

#### Seasonal Resident Population

The Muskoka Region is a very popular location for Ontarians to keep second homes or summer homes. Figures for 2011 indicate that in the summer months the population of the MDM was estimated to grow by about 75,600, of which about 6,200 or 8.2% of the Muskoka District Municipality's seasonal population reside in Huntsville, the smallest of any of the communities in Muskoka. Seasonal residents tend to have much higher than average income levels, and likely higher levels of educational attainment and are thus a good potential market for the MHP.



The data indicate the need for MHP to seek to appeal to both permanent and seasonal residents from throughout Muskoka and not just Huntsville.

Municipality	Estimated Seasonal Population	
	Count	%
Bracebridge	7,045	9.3%
Georgian Bay	14,766	19.5%
Gravenhurst	11,036	14.6%
<b>Huntsville</b>	<b>6,171</b>	<b>8.2%</b>
Lake of Bays	11,480	15.2%
Muskoka Lakes	25,129	33.2%
<b>Muskoka DM</b>	<b>75,626</b>	<b>100.0%</b>

### Permanent Resident Age

The median age of Huntsville and the Muskoka District Municipality permanent resident population is substantially older than the provincial and national averages. There is a much higher percentage of residents who are aged 60 or older than provincial or national averages. In general, this should be positive to MHP since the market for heritage villages tends to skew older. With the aging of the large baby boom generation the *trend to an older population will continue for the next two decades. At the same time it will be essential for MHP to consider strategic directions to widen appeal to the family market, particularly given the increasing trend towards grandparents as caregivers.*

Age of Population, 2011	Huntsville		Muskoka DM		Ontario		Canada	
	#	%	#	%	#	%	#	%
0-9 years	1,800	9%	4,950	9%	1,417,015	11%	3,686,990	11%
10-19 years	2,305	12%	6,415	11%	1,627,390	13%	4,098,490	12%
20-29 years	2,030	11%	5,870	10%	1,668,030	13%	4,357,040	13%
30-39 years	1,980	10%	5,615	10%	1,644,700	13%	4,336,835	13%
40-49 years	2,765	14%	8,175	14%	1,979,955	15%	5,000,005	15%
50-59 years	3,095	16%	9,810	17%	1,870,760	15%	4,999,600	15%
60-69 years	2,420	13%	8,490	15%	1,329,140	10%	3,574,385	11%
70-79 years	1,570	8%	5,365	9%	796,930	6%	2,075,765	6%
80 years and older	1,105	6%	3,355	6%	517,910	4%	1,347,585	4%
Median Age	45.7		48.0		40.4		40.6	

Source: Statistics Canada, 2011 Census

### Permanent Resident Education

Level of education is the variable with the closest correlation to museum and other cultural attendance and participation, as supported by numerous studies. The higher the level of education of the individual the more likely it will be that this person will attend or participate. Huntsville and the MDM have a high proportion of permanent residents with a college diploma

or some university, but a *smaller proportion with a university diploma or degree most likely to attend museums and related institutions, thus suggesting a weaker than average resident market or a market that requires a higher level of entertainment value to increase the likelihood of attendance. Many tourists will expect the same thing. But that has implications to capital investment and operating costs, including staffing and volunteers. We have sought to identify a balance as discussed further in Chapter 4.*

Educational Attainment	Huntsville	Muskoka DM	Ontario	Canada
Less than high school	12%	12%	19%	13%
High school	26%	28%	27%	23%
Trade certificate	13%	11%	7%	12%
College diploma or some university	31%	31%	24%	26%
University diploma or degree	18%	17%	23%	26%
<b>Total Pop (25 to 64 yrs)</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<i>Source: Statistics Canada, National Household Survey 2011, total population 25+</i>				

### Permanent Resident Income

Like education, household income is an important indicator of potential museum attendance, but is not as significant an indicator as education. That is, high education, low-income persons are more likely to attend than are persons of high income and low education.

Median family income are lower than both provincial and national averages, and confirming the price sensitivity heard in the interview process that helps to explain why only 6% of non-school visitors to MHP were residents within 100 km of Huntsville.

Income	Huntsville	Muskoka DM	Ontario	Canada
Median Family Income- all census families, 2010	\$ 71,006	\$ 72,732	\$ 80,987	\$ 76,511
<i>Source: Statistics Canada: 2011 Census</i>				

### Permanent Resident Gender

Women account for a slightly larger percentage of the population in Huntsville, MDM and on a provincial and national level. Generally women are a more important market for museum-related institutions than are men for the following main reasons:

- Women tend to make the decisions in a household regarding educational experiences for their children. Therefore, the greater the perceived educational benefits of museums and related institutions the more likely they will be selected;
- Women account for a large majority of teachers who usually make the decisions regarding school field trip destinations;
- Women tend to make the decisions regarding attractions to visit while on family vacations and account for a majority of bus tour passengers and trip planners.

Gender of Population, 2011	Huntsville		Muskoka DM		Ontario		Canada	
	#	%	#	%	#	%	#	%
Male	9,230	48.4%	28,780	49.6%	6,263,140	48.7%	16,414,225	49.0%
Female	9,830	51.6%	29,270	50.4%	6,588,685	51.3%	17,062,460	51.0%
<i>Source: Statistics Canada, 2011 Census</i>								

*Women already account for an estimated 55% of total non-school attendance to MHP, which is positive. To increase attendance levels further planning for MHP must take into account issues of particular importance to women. These include public safety and therefore better lighting and security cameras, as discussed further in Chapter 4.*

### Permanent Resident Ethnicity

Huntsville and the MDM have a substantially lower representation of visible minorities than Ontario and Canada. The following table, however, indicates the substantial and increasing multicultural nature of Ontario's population and reinforces the need for the future MHP to appeal to a more diverse audience, despite a currently narrow local ethnic profile.

Visible Minorities, 2011	Huntsville		Muskoka DM		Ontario		Canada	
	Count	%	Count	%	Count	%	Count	%
Total population in private households	18,560	100.0%	55,835	100.0%	12,651,795	100.0%	32,852,320	100.0%
<b>Total visible minority population</b>	<b>210</b>	<b>1.1%</b>	<b>1,010</b>	<b>1.8%</b>	<b>3,279,565</b>	<b>25.9%</b>	<b>6,264,750</b>	<b>19.1%</b>

## 3.3 SCHOOL MARKETS

It is important for Muskoka Heritage Place to continue to appeal to and meet the curriculum needs of the school group market for the following main reasons:

- Education is part of the mission and mandate of all museum-related attractions. There needs to be opportunities to broaden and deepen participation from school groups.
- Children brought to museums as part of school field trips often convince their parents to take them again. As adults, they often return with their own children for nostalgic reasons.
- For children in lower income/education families attending on a field trip is often the only opportunity to attend.

School groups generally represent 10% to 20% of total attendance for history museums and historic sites. While the reported 9.4% to Muskoka Heritage Place is only slightly below this common range, on a numerical basis the figure is only about 1,000 school students per year. The key indicators under consideration are the size of the student population within a convenient distance, relationship to curriculum, student enjoyment, proximity and cost.

## Enrolment Levels

Given the realities of transportation time and cost, most school visits to the Muskoka Heritage Place will continue to be from within the Trillium Lakelands District School Board and the Simcoe Muskoka Catholic District School Board. However, it must be emphasized that these school districts represent a wide often rural, geographic area and that schools closer to MHP are more likely to attend.

Enrollment levels are set out in the table below and indicate a combined elementary school enrollment of about 36,500, of about 66% are in elementary level schools most likely to take field trips. The data also indicate a substantial increase in elementary level enrollment while secondary enrollment levels combined. This is very much a reflection of the growing number of young children of millennials.

School Board	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17 (Projected)	% of Regional Total	Provincial Total	1 Year % Change	6 Year % Change
<b>Trillium Lakelands District School Board</b>										
Elementary	10,022	9,873	9,739	10,707	10,626	10,503	28.8%	0.5%	-1.2%	4.8%
Secondary	6,357	6,111	5,826	5,663	5,258	5,043	13.8%	0.3%	-4.1%	-20.7%
<b>Total</b>	<b>16,379</b>	<b>15,984</b>	<b>15,565</b>	<b>16,369</b>	<b>15,884</b>	<b>15,546</b>	<b>42.6%</b>	<b>0.8%</b>	<b>-2.1%</b>	<b>-5.1%</b>
<b>Simcoe Muskoka Catholic School Board</b>										
Elementary	12,079	11,949	12,075	13,480	13,693	13,913	38.1%	0.7%	1.6%	15.2%
Secondary	7,771	7,485	7,057	6,648	6,565	7,025	19.3%	0.4%	7.0%	-9.6%
<b>Total</b>	<b>19,850</b>	<b>19,433</b>	<b>19,132</b>	<b>20,127</b>	<b>20,258</b>	<b>20,938</b>	<b>57.4%</b>	<b>1.1%</b>	<b>3.4%</b>	<b>5.5%</b>
<b>Regional Total</b>	<b>36,229</b>	<b>35,417</b>	<b>34,697</b>	<b>36,496</b>	<b>36,142</b>	<b>36,484</b>	<b>100.0%</b>	<b>1.9%</b>	<b>0.9%</b>	<b>0.7%</b>
<b>Total Provincial Enrolment</b>	<b>1,878,520</b>	<b>1,863,745</b>	<b>1,844,218</b>	<b>1,963,159</b>	<b>1,953,633</b>	<b>1,951,586</b>	<b>N/A</b>	<b>100.0%</b>	<b>-0.1%</b>	<b>3.9%</b>

Source: Ministry of Education - Projected School Board Funding

## Curriculum Links

A key factor in choosing locations for field trips for teachers are links to the curriculum. Muskoka Heritage Place has been developed and arranged to reflect a pioneer crossroads community as it was between 1860 and 1910. An interview with the curriculum planner for the Trillium Lakelands District indicated that Muskoka Heritage Place has greater potential as a field trip destination for Huntsville and Muskoka area schools. However, although there have been updates to better link to the curriculum, programs require additional enhancement to improve and update the learning experience and to link to other areas of the curriculum.

While the study of the pioneer period is usually covered at the Grade 3 level, topics of this period are now increasingly being incorporated into the Grades 4 and 6 social studies curriculum as well. With the Truth and Reconciliation Act, there is now also an increasing effort to incorporate and give greater prominence to topics on Indigenous histories and heritage throughout which MHP could also include. However, this needs to be done in an authentic and respectful way, and it was advised that MHP consult with Indigenous education planners and the local Indigenous community to develop and deliver these programs.

Given the outdoor and natural setting of MHP, further potential for curriculum linked school programming that targeted the science curriculum was also considered an opportunity. This would focus on the "Life Systems" and the "Earth and Space System" aspect of the curriculum around topics from the Grade 1 to 4, Grade 6 and 7, and Grade 9. Activities could include pond dipping, nature walks, and even canoeing. The saw mill was seen as a great opportunity to discuss science, ecology, manufacturing and climate change in a past, present and future context all in one place.

It was felt that with focused development, attractive and appealing programs could be developed at MHP for all grades, but MHP will need to be selective due to staff capacity limitations, and the priorities should be First Nations/Indigenous history for lower grades, as well as aspects of natural history/environmental science for upper grades. These programs could also extend to informal education programs that would be appealing for parents such as Spring and Summer Camps. The outdoor nature of the site and the ability to “be and learn in nature” was considered appealing.

Largely for this reason, it was felt that *new indoor space is not considered necessary, but designated outdoor education space within the village that includes a covered area during inclement weather was highlighted as a requirement, as was an improved trail network.*

### Field Trip Policies and Practices

Elementary school markets are easier to target than secondary school markets for educational programs. This is due to the fact that elementary students spend all day with one teacher. In high school, field trips usually focus on one topic and require students to be absent from their other classes, again highlighting the importance of not only curriculum linked programs, but programs that can offer cross-curricular links to more than one subject area. Interviews suggest that many schools in the region understand the benefit of field trips and are not afraid to travel if the programs are of a high quality, cross-curricular and affordable. Several regional schools are known to travel for field trips to Toronto attractions, Saint Marie among the Hurons and to Science North in Sudbury.

*Efforts to promote new programs and introduce educational professionals to the site as a field trip destination will be essential, but as noted MHP will need to be selective due to expected continuing staff capacity limitations.*

### Proximity and Cost

Currently, educational program fees at MHP are \$13.50 per student. Preferred field trip destinations like the Royal Ontario Museum charge \$16 per student for a 90-minute program that includes a guided tour and hands-on lab. At Saint Marie among the Hurons, the most expensive program is \$14 per student for a full day program with a costumed interpreter.

In addition to admission costs, schools must also take into consideration transportation time and cost. The cost of transport has a great impact on the number of field trips that can be taken in a school year and means that teachers and organizers will be under pressure from parents and school boards to get the greatest value for money.

Given that the Huntsville High School is within a short walking distance of MHP, a partnership with the school was seen as a great opportunity to develop educational program links, and due to this proximity visits from these upper grade levels should not be as difficult to arrange as they normally are with high school classes or individual students - provided there is a clear curriculum-related output for teachers. An environmental sustainability curriculum link in particular has been recommended with this school firmly in mind.

Suggestions from the interview and from the online survey included engaging students to help with research for “missing” stories, repair and maintenance projects for the period buildings

(which also might curb known instances of vandalism), construction projects for new amenities such as picnic tables, benches and display cabinets, as well as designing and producing new marketing materials.

### 3.4 TOURIST MARKETS

Tourism in the Muskoka region is very strong but is reported to have declined. Muskoka Tourism reports that the Muskoka census division was once ranked in the top 10 in Ontario, but has declined to 15<sup>th</sup> out of 47 divisions in Ontario. The region was once home to 76 resorts but increasing competition has led to a substantial decline. Hotel rooms have declined to the current 4,000 from the 9,000 some 20 years ago. Huntsville is in the northern part of the Muskoka region and includes less seasonal residents than other parts of Muskoka, as discussed earlier in this chapter, but is close to and part of the route to and from the popular Algonquin Park.

This section considers available tourism data and the implications to Muskoka Heritage Place. Some more recent data are available for Muskoka (Sub-Region 44) with older but more substantial data available for the larger Algonquin, Muskoka, and Parry Sound Region 12.

#### Profile of Tourist Markets

- **Overnight and Day Trip Tourism in Muskoka:** Some 95% of tourist visits to Muskoka are from among Canadians, primarily from within Ontario. The available and most relevant 2014 data for Muskoka Region 44 focuses on domestic tourists and indicate a decline in tourist volume over the period from 2012 to 2014, but a still substantial 2.74 million annual tourists visits in 2014. Positive is that *overnight tourists increased while day trip declined. This is positive because overnight tourists have more time to attend attractions like MHP.*

Volume of Tourism	2012			2013			2014		
	Overnight	Day Trip	Total	Overnight	Day Trip	Total	Overnight	Day Trip	Total
Domestic	1,786,284	1,104,935	2,891,219	1,916,470	1,016,488	2,932,958	1,903,302	839,100	2,742,402
<i>Source: Ministry of Tourism, Culture and Sport - CD44 Muskoka</i>									

- **Average Length of Stay of Overnight Tourists:** The data indicate a growth in the average length of stay in Muskoka from 2.6 to 2.7 nights among domestic visitors. This is positive because the greater the length of stay the greater the opportunity to attend attractions.
- **Origin of Ontario Tourists** - As shown on the table the main tourist market for Muskoka is from the Toronto Metro area, with variations over the three years projected. *The travel time and traffic from the Greater Toronto area is a major issue for Muskoka and a proposed airport used by the major airlines between Gravenhurst and Huntsville would be very positive if implemented.*

Ontario Visitors to Muskoka by Region of Residence Region	Muskoka # in 2012	Muskoka % in 2012	Muskoka # in 2013	Muskoka % in 2013	Muskoka # in 2014	Muskoka % in 2014
Southwest Ontario	59269	2.0%	80621	2.7%	101964	3.7%
Niagara Falls and Wine Country	43307	1.5%	45375	1.5%	57265	2.1%
Hamilton, Halton, Brant	319899	11.0%	351365	11.9%	353318	12.9%
Huron, Perth, Waterloo, Wellington	113770	3.9%	144,907	4.9%	147649	5.4%
<b>Greater Toronto Area</b>	<b>919270</b>	<b>31.5%</b>	<b>1,127,335</b>	<b>38.3%</b>	<b>1186522</b>	<b>43.4%</b>
York, Durham, Hills of Headwaters	711618	24.4%	506,160	17.2%	193048	7.1%
Simcoe	326754	11.2%	374,780	12.7%	402284	14.7%
Kawartha and Northumberland	40854	1.4%	74,304	2.5%	70409	2.6%
South Eastern Ontario	21521	0.7%	21,438	0.7%	9046	0.3%
Ottawa and Countryside	23589	0.8%	18,975	0.6%	23869	0.9%
Haliburton Highlands to the Ottawa Valley	24975	0.9%	6,528	0.2%	15751	0.6%
Muskoka, Parry Sound and Algonquin Park	219093	7.5%	105,784	3.6%	117878	4.3%
Northern Ontario	45396	1.6%	41,579	1.4%	28940	1.1%
Northeastern Ontario	41382	1.4%	40,534	1.4%	27470	1.0%
North Central Ontario	3073	0.1%	356	0.0%	710	0.0%
Northwestern Ontario	940	0.0%	688	0.0%	760	0.0%
<b>Total</b>	<b>2,914,710</b>	<b>100%</b>	<b>2,940,729</b>	<b>100%</b>	<b>2,736,883</b>	<b>100%</b>

Source: Ministry of Tourism, Culture and Sport - CD44 Muskoka

- **Main Purpose of Trip** - The main purpose of tourist trips to the Muskoka region is for pleasure, but there is a high proportion of people visiting friends and relatives. *This latter category emphasizes the importance of attracting permanent and seasonal residents as they usually advise what their visitors should do and often accompany them.*

	2012	2013	2014	2012	2013	2014
Main Purpose of Trip (Person Visits)	Canadian	Canadian	Canadian	%	%	%
Pleasure	1,797,826	2,010,598	1,914,685	62.2%	68.6%	69.8%
VFR	721,772	784,125	722,610	25.0%	26.7%	26.3%
Shopping	58,577	13,846	16,410	2.0%	0.5%	0.6%
Conventions (Personal)	14,789	9,186	10,973	0.5%	0.3%	0.4%
Business	223,493	76,980	54,027	7.7%	2.6%	2.0%
Other Personal	74,762	38,223	23,697	2.6%	1.3%	0.9%
<b>Total</b>	<b>2,891,219</b>	<b>2,932,958</b>	<b>2,742,402</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Ministry of Tourism, Culture and Sport - CD44 Muskoka

- **Seasonality** - Peak tourist season in the Muskoka region is between July and September and the percentage has grown over the past three years, whereas there have been declines in the other seasons, with variations likely reflecting weather conditions. The spring is the second most visited period as residents seek opportunities after the long winter. *The data nonetheless raise questions about the seasonality of MHP.* Our recommendations are set out in Chapter 4.

	2012	2013	2014	2012	2013	2014
Quarter Trip Started (Person Visits)	Canadian	Canadian	Canadian	%	%	%
Q1 (Jan - Mar)	199,521	200,330	182,913	6.9%	6.8%	6.7%
Q2 (Apr - Jun)	771,048	851,220	606,054	26.7%	29.0%	22.1%
Q3 (Jul - Sep)	1,488,686	1,535,066	1,514,241	51.5%	52.3%	55.2%
Q4 (Oct - Dec)	431,962	346,342	439,194	14.9%	11.8%	16.0%
<b>Total</b>	<b>2,891,217</b>	<b>2,932,958</b>	<b>2,742,402</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Ministry of Tourism, Culture and Sport - CD44 Muskoka

- **Activities Undertaken** - Tourists come to the area mainly for outdoor or sporting activities (78% in 2014). Less than 3% attended historic sites and less than 4% attending museums, for a combined 7%. The enhancement of MHP is consistent with an objective for Muskoka Tourism to seek to rebrand from the stereotypical image of a quiet "Muskoka chair on the dock" to an active area with lots of things to do.

	2012		2013		2014	
Activities Participated (Person Visits)	Canadian	Canadian	Canadian	Canadian	Canadian	Canadian
Festivals/Fairs	115,603	5.1%	72,190	3.1%	31,691	1.6%
Cultural Performances	53,173	2.3%	40,160	1.7%	42,643	2.2%
Museums/Art Galleries	74,910	3.3%	66,101	2.8%	68,829	3.5%
Zoos/Aquariums/Botanical Gardens	2,462	0.1%	3,257	0.1%	6,534	0.3%
Sports Events	55,879	2.5%	62,894	2.7%	37,490	1.9%
Casinos	24,660	1.1%	55,753	2.4%	59,248	3.0%
Theme Parks	12,531	0.6%	35,592	1.5%	37,585	1.9%
National/Provincial Nature Parks	211,792	9.3%	201,465	8.6%	99,686	5.1%
<b>Historic Sites</b>	<b>66,965</b>	<b>2.9%</b>	<b>63,020</b>	<b>2.7%</b>	<b>48,529</b>	<b>2.5%</b>
Any Outdoor/Sports Activity	1,656,958	72.8%	1,739,733	74.3%	1,532,625	78.0%
<b>Total</b>	<b>2,274,933</b>	<b>100.0%</b>	<b>2,340,165</b>	<b>100.0%</b>	<b>1,964,860</b>	<b>100.0%</b>

Source: Ministry of Tourism, Culture and Sport - CD44 Muskoka



# 4. RECOMMENDATIONS/ ASSUMPTIONS

This chapter sets out a series of key recommendations/assumptions and their rationale, which have been approved and phased as short-term (1-2 years), medium term (3-4 years) and long term (5-7 years) to form the basis for the attendance, operating revenue and expense projections in the next chapter of this report.

## 4.1 SHORT-TERM

### 4.1.1 CORE RECOMMENDATIONS

1. Recognize that the terms of the agreement between the Rotary Club of Huntsville and the Town of Huntsville was that the Village site remain a pioneer village or park. Although there may or may not be a legal option that would allow for only a public park, the intent of the Rotary Club and the Town of Huntsville was always to preserve the pioneer heritage of Muskoka. From a practical standpoint, the cost to relocate the 17 pioneer buildings from the site, including the museum, would be expensive and, more importantly, the buildings are now part of the heritage of the site and the Town of Huntsville. This feeling was clearly expressed by survey respondents and in the public meeting/open house held with Huntsville residents and with other persons interviewed. Our recommendation is that MHP ***be both a charged admission pioneer village plus train attraction and a free admission public park, but at largely different times for the village and the public park.***
2. In the context of the following recommendations/assumptions in this study, ***modify the foundation statements for MHP.*** The existing Mission Statement is as follows:

*To collect, care for, interpret and preserve a viable collection of historical artifacts, documents, photographs, archives and other materials particular to Muskoka; and to provide a uniquely historic attraction which imparts accurate, educational, historical information in a spirited and entertaining manner pertinent to the Muskoka experience.*

This is a description of why the institution exists, which is what a good mission statement should be. However, the “why” is changing on the basis of this study, and the Mission Statement will need revision. We therefore recommend the following revised Mission Statement:

*Muskoka Heritage Park<sup>5</sup> provides visitors with a historically accurate and enjoyable heritage experience through its museum, heritage village, natural environment, walking trails and train ride attractions. The Park collects, cares for, interprets and preserves a viable collection of historical artifacts, documents, photographs, archives, native and heritage plants and other materials particular to Muskoka and offers an interpreted natural landscape for all to enjoy.*

#### Recommended Vision Statement

In addition to the Mission, there should also be a statement that articulates “what” the institution is, or what it aspires to be, as an inspiring “outside in” view of the institution. This is a Vision Statement, and we therefore recommend the following to fulfill that need:

*Muskoka Heritage Park is an accessible resource and heritage attraction for residents and visitors alike – a showplace for Huntsville’s human history and natural heritage in a park setting. It is an active centre of educational programs, recreational activities and private and public events, as well as historical exhibitions and heritage-related public programming.*

The mandate is a statement of limits – chronological, geographical and subject matter. The recommended mandate is as follows:

*Muskoka Heritage Park interprets the human and natural history of Huntsville and area from earliest times to the early 20<sup>th</sup> century, including First Nations, pioneer history and settlement, and the coming of industry and the railroad era.*

- 3. As a free admission public park MHP should be available for walking, jogging, snow shoeing, cross country skiing, picnic tables near Cann Lake and other recreational opportunities on a year round basis when it is not functioning as a heritage village.** We also recommend implementation of day and night vision security cameras, lighting and signage to deter potential vandalism and vehicle access. In fact, the more people using the site for recreational purposes on a year-round basis the less likely the vandalism. Engaging youth from the neighboring high school in the operation and maintenance of MHP would create a greater feeling of ownership and pride in the facility and may also help to curb vandalism.
- 4. As a charged admission heritage village** we recommend/assume that the daily operating season be limited to the peak periods for tourism - the Canada Day to Labour Day weekends - with farm animals on site only during this peak period. Weekend only openings as a heritage village would take place in May, June, September and October plus opening for other special events during the year and for pre-booked school groups. During other days in May and June, September and October, and assuming very little staff or volunteer presence or activities, MHP should be open as a public park and to allow some access to the interior of some of the buildings. During the other months in which all buildings would be locked, the site would serve as a public park with the opportunity to see only the exterior of the heritage buildings. The recommended schedule is summarized as follows.

---

<sup>5</sup> This assumes Muskoka Heritage Park will be the future name. If no change or another name it would be substituted in these statements for the recommended name.

Charged Admission for Village and Train	Free Admission Village and Public Park, No Train Operation	Free Admission Public Park, No Train Operation
Daily, Canada Day to Labour Day Weekends and Weekends Only May, June, September and October	Weekdays May, June, September and October	Daily November through April except during special events

5. Taking into account that the primary funders of MHP are the residents/taxpayers of the Town of Huntsville and that residents within 100 km. of Huntsville currently account for only 6.1% of non-event visitors, ***we recommend free admission to Huntsville residents for the Village at all times with the exception of charged special events.*** The train would still be charged to all visitors except during promotions it would offer. We do not recommend asking for identification when visitors claim they are residents of the Town of Huntsville. Private sponsorship should be sought for the free admission to Huntsville residents as part of a recommended menu of sponsorships discussed later in this chapter.
6. The Museum facility is already free to visitors who pay to attend the Village or Train. We recommend that the ***Museum be free to all visitors at all times and also serve more of an orientation role to both the Village and the Train*** and thereby encourage visitors to attend them. However, the second entrance will need to be maintained for the Train with a separate ticketing opportunity there given the walking distance between the Museum and train station.
7. Taking the foregoing into account we recommend that the MHP name/brand be modified to be ***Muskoka Heritage Park***. The concept of a park is that it is welcoming to people and is clearer than a "place." Other Canadian examples using the heritage park brand include Calgary Heritage Park and Country Heritage Park in Milton.
8. ***Pursue the offer from the Rotary Club of Huntsville to increase its support for MHP on the condition that the Town maintains or increases its annual financial support for MHP.*** In a brief to the consultants and copied to Town officials, dated January 7, 2017, members of the Rotary Club of Huntsville outlined the history of their involvement with the founding and development of Muskoka Heritage Place starting in 1957. This history is summarized as part of Chapter 1 of this report. The consultants met with a Rotary Club representative and asked about the potential role of the Rotary Club going forward. Part of the response in the written brief was as follows: "It may be time for Rotary to take a break from building new assets and instead focus on finding ways to increase the use, enjoyment, revenue from, and maintenance of existing assets that we helped to build." It was conveyed that "Rotary is a volunteer organization with an annual change of leadership. As such Rotary will not undertake the liability of a formal ongoing governance role." Proposed instead was an Advisory Committee to help make MHP more sustainable. This would include "to propose and coordinate Rotary activities, events and hands-on projects at MHP" on the condition that "the town financial support for MHP continues at the same level or is preferably increased."

## 4.1.2 CAPITAL IMPROVEMENTS

9. The capacity for rentals at MHP is 80 people in the church building. We do not recommend investment in additional or larger indoor rental spaces. Instead we recommend/assume a **covered pavilion to be used for evening rentals and school and other programming that would add to and not compete with existing offerings of the Canada Summit Centre and Active Living Centre**. A pavilion is different than a bandshell such as the one that exists in River Mill Park and the one in Arrowhead Provincial Park, well outside of Huntsville. The covered pavilion, potentially with a bonfire pit, could be 3,000 sq. ft. (60 ft. by 50 feet). The design of the shelter should be in keeping with the heritage aesthetic of the village so as not to detract from the immersive period experience. An examples provided in Chapter 2.5 illustrate success through a simple but flexible design that might include removable canvas drape to protect users during inclement weather.
10. Interviews suggested a preference by some for the pavilion to be located near Cann Lake, but there was acknowledgement of the greater likelihood for resident complaints given the closer proximity to residences there. Another suggestion was that the pavilion be located at the end of the train ride adjacent to Fairy Lake to allow for activities that would provide more to do. The **assumed site for the covered pavilion is within the Village between the Wesley Methodist Church and the Boles Barn**. This would allow for wedding ceremonies in the church and receptions in the pavilion.



11. An outdoor pavilion used for purposes of weddings, other rentals, public and educational programming will require **warming kitchen and washroom facilities, table and chair storage**. Regarding the warming kitchen it should include a large open space with appropriate electrical to plug in hot boxes, coffee makers, etc., as well as a set up staging area for serving and clearing. Cube vans/trucks will require good access to be able to back up to it. Although they may be developed in a nearby building we have assumed that these amenities will be integrated as indoor spaces within the pavilion structure. It is assumed that catering of events will be provided by a private sector caterer.
12. **Invest in the re-creation or development of walking, snowshoe and other trails and other recreational amenities** for residents when MHP is more of a public park than a heritage village. Picnic tables around the lake would also help to make the site more welcoming. Consideration should also be given to a skating rink on site.
13. We recommend/assume a **modification to the Museum to add an orientation experience for the Village and Train**. Orientation currently takes place at the Museum at the entrance to the heritage village, consisting mostly of direction by desk staff, if available, and a printed map of the site. The Museum does provide a good quality exhibition on the main themes of regional history in the historic period under consideration, but it is small and there is not a significant amount of orientation to the village and site via the exhibition. Recommendations for improving orientation include:
  - Use the existing temporary exhibition space in the Museum as a venue for an orientation video for the Park outlining key attractions on site, what there is to see and do, and footage of the Park at peak times to feature key events and programs.
  - A large outdoor signboard with a map of the Village, with a “you are here” indication as well as indications of key things to see and do on the map, and an option for smartphone app download. Properly located, this would help create a sense of arrival to the site which is currently lacking.
14. Capital improvements to the various Village buildings should be considered a long-term objective but we recommend that priority be given to the **Boles Barn**. This includes enhancements to existing washrooms with kitchen and additional washroom facilities, table and chair storage integrated into new Pavilion. Artifacts suggested appropriate to the Barn include a cream separator, sharpening stone, harness and yokes as well as relocating the “What is It” display to the ground floor along with the miniature logging exhibit.

### 4.1.3 PROGRAMMING

15. **Identify opportunities for additional events at MHP**. There are also opportunities to tie in events at MHP with downtown sales and other events. These include the Beer Festival over the Victoria Day Weekend, weekend Nuit Blanche in early July, Midnight Madness the second Friday in July, the Sidewalk Sale the third Saturday in August and Culture Days in September. These and other festivals and events should take place primarily during charged admission periods at MHP. Free events encourage people to visit then and discourage visits during paid periods.

## 4.1.4 OPERATING SCHEDULE

The recommended operating schedule is set out in section 4.1 above. Other recommendations are as follows:

16. Since it serves as an office for year-round MHP staff, *the Museum building could continue to be open on a largely year-round basis*, in part also to retain the full provincial Community Museum Operating Grant. Washrooms in the Museum should continue to be available to visitors on a year-round basis.

## 4.1.5 ADMISSION CHARGES

17. Recognize that young adults (18-24) are a disproportionately small market for Muskoka Heritage Place *by redefining the age of an adult for ticketing purposes to 25-64 and introduce a new youth ticket category for ages 13-24 at the same rate as the senior rate*. Young adults, whether in school or starting in the working world, tend to be very price conscious, and a discount would help to attract more of them and also help MHP to become more of a date place.
18. With free admission to the Museum building for all visitors at all times there would be three and not four ticket options. The *recommended admission charges* are as follows and take into account that the Village is over-priced relative to other pioneer/heritage villages in Ontario discussed in Chapter 2, but assumes enhancements. Recommended tax included prices are shown here. With assumed free admission for all Huntsville residents, reduced admission charges and the complexities and potential abuse associated with introduction of a family rate, we have not recommended or assumed it within the period projected in this study.

Regular Charges	Village Only	Train Only	Combination
Adult (25-64)	\$9.00	\$7.00	\$14.00
Senior (65+)	\$8.00	\$6.00	\$12.00
Youth (13-24)	\$8.00	\$6.00	\$12.00
Child (3-12)	\$6.00	\$5.00	\$9.00

19. We recommend a *\$2.00 surcharge on all tickets during special event days*, as practiced for example at Lang Pioneer Village near Peterborough. This recognizes the added value during the special events.
20. *Tour and other groups of 15 or more persons* should be provided with a discount of \$2.00 off the combo ticket and \$1.00 off the Train or Village tickets.
21. With free admission to the Museum building and an orientation role, more people should start their MHP experience in the Museum. We recommend an *interactive donation box and signage referring in the Museum to "Donate What You Can"* to support MHP in its initiatives to preserve and interpret the heritage of Muskoka, especially during the free admission days.

## 4.1.6 REVENUE CENTRES

22. **Eliminate the lower level membership category** for at least several years and focus only on an incorporated Friends organization or Foundation able to provide tax receipts for donations to MHP.

## 4.1.7 STAFFING AND VOLUNTEERS

23. At present there are only 1.75 FTE allocated to MHP. These positions will need to be **retained on a year-round basis** to coordinate rentals, help with site security, and provide maintenance and administrative services when MHP operates as a public park and as a heritage village. Alternatively, the addition of another staff person could free up time currently spent by the MHP Manager on maintenance to allow the Manager to serve the volunteer coordination role.
24. **We recommend/assume the addition of another full-time staff person** to provide maintenance and related services on a year-round basis and free up the Manager to serve in a Volunteer Coordination role and other more senior functions. Rebuilding volunteer support for MHP is key to its future. Volunteer coordination entails the recruitment, direction and manifest appreciation of volunteers to help develop and maintain a strong volunteer program.
25. There will also be a need for **additional part-time staff**. For example, a greater focus on facility rentals will require staff to support each rental. An interview indicated concern about the staff available for the Feast of the Harvest event in the past and the lack of electricity, and that the rental will not be repeated until enhancements are made to both the facilities and the staff support offered. The additional revenues should exceed the costs.
26. Encourage high school students at the neighboring Huntsville High School to **volunteer** at MHP as part of their 40-hour volunteering requirement. There were differences of opinion heard in the interview process regarding the availability of students to volunteer. One view suggested they would not do so because they seek summer jobs. The other view was that not all students have summer jobs, especially in the lower grades. Some students should also be available at minimum wage during the shoulder months while still in school and with time available to work on weekends. It was suggested that only those students with an interest in the mission of MHP be invited and that they agree to not use cell phones if in costume.
27. Pursue a potential opportunity for a **flower garden and additional native plants and heritage species with the Huntsville Horticultural Society**.

## 4.1.8 MARKETING

28. A new name and a refreshed visitor experience require that **the brand identity and logo for MHP be updated to reflect these changes**. This will need to be considered early as it will have a knock on effect for all other printed materials, wayfinding and signage, and digital materials, all of which need enhancement.

29. There is no direct spending on the marketing of MHP as it is promoted as part of the Town marketing but has no separate marketing budget. Opinions heard in the interview process included some perceptions that MHP already offers a very good visitor experience and that all that is required is spending on marketing it, but many others drew unfavourable comparisons to the site as it was 20 or 25 years ago when it was better programmed and better appointed. We concur with the latter view; while the site has a low public profile, our review of (and experience with) comparable heritage villages confirms that the current visitor experience (the product) is not up to par. The data indicate that only 6% of non-school visitors to MHP reside within a 100 km radius of Huntsville. Many of these persons, especially residents of Huntsville, are already aware of MHP yet choose not to attend. This suggests that the core strategies to increase attendance levels go far beyond marketing. However, we do recommend a **separate marketing budget for MHP** that would allow for collaboration with Muskoka Tourism and other agencies to help raise awareness of the site, which as noted is very low at present.
30. Follow up with *Explorer's Edge Region 12 on its offer to match marketing dollars for MHP.*
31. Recommendations for **enhancing the MHP web site and social media** include the following points:
- Configure the website to include a more mobile friendly version and consider ways to provide free WiFi around the village for visitors to use.
  - Inclusion of a site and trails map to highlight the key features of the museum, village and train experience and to make it easier for potential visitors to understand the layout of the site and where to park before arriving.
  - Use of high quality imagery which accurately reflects the experience provided on site. Costumed interpreters should only feature in images if this experience will be consistently offered throughout the season or if clear that they are present primarily during peak periods and special events. Otherwise it may create false expectations.
  - Formal and informal educational opportunities should have their own navigation tab across the top of the page, rather than be included under "renting our site". Additional downloadable teaching resources can also be included here to help teachers to better understand MHP and how it can help them deliver core curriculum.
  - There are opportunities to increase the interactivity of the website and social media, and use it as an interpretive tool, by including more information about the site and buildings, as well as video content which illustrates archival and contemporary footage of activities happening on site. This could include activities and demonstrations, as well as behind the scenes opportunities with the curator and to watch active conservation of the buildings.
  - With a family friendly focus and the importance of women as decision makers, social media activity should focus on developing their Facebook platform. Social media is also a great way to engage with a younger audience and could provide opportunities to get more youth involved as social media volunteers at MHP, actively creating content.
  - Opportunities exist to increase the number of followers on Facebook, as well as Twitter by posting content more often (at least 3-4 times per week during peak season). These platforms are also important ways to promote the site and notify the public about upcoming events and activities. All events should be promoted through social media.
  - Consideration should be given to creating hashtags for signature events and materials set up around the site to encouraging visitors to post their own photos online with MHP tagged.



## 4.2 MEDIUM TERM

32. Although historic sites and gardens tend to offer more appeal to older market segments, we recommend other site enhancements that will appeal to the young family market as well. This includes a **heritage-themed playground** that would serve residents using MHP as a public park as well as tourists who would be more likely to attend with their children on the basis of the playground. Other family-friendly features could include live animals, hayrides linking the village and the train, and more hands-on opportunities. The playground should be distant from most of the heritage buildings and is recommended to be located in association with the Building 9 and outdoor area that has been used for farm animals.
33. The train is currently not operational during Sundays, with the rationale that tourists are driving away in the afternoon. We recommend that there be **experiments with Sunday train operations during July and August, at least including the long weekend Sundays**. We also recommend experimentation with additional operational days for the train during September and October.
34. **School groups should be offered the option of teacher-guided visits** at a \$2.00 discount off the child and youth rates or options for guided and programmed visits up to the \$13.50 currently offered.
35. Private sponsorship will be difficult because MHP is Town-owned but a **menu of sponsorship opportunities should increase the likelihood of support**. The menu could vary from sponsorship of free admission to Huntsville residents to school programs to live animals and playground maintenance or the adopt-a-building concept recommended in the on-line survey.
36. We recommend an **MHP Foundation** to raise private funds and issue tax receipts for it. In the past there was a Muskoka Heritage Place Operations Board that disbanded. The current policy of offering no recognition for sponsorships is a disincentive to private support. We recommend that methods of recognition be developed into an easily changeable donor wall inside the Museum.
37. Former members of the Cultural Tourism Coordinating Committee and Huntsville Festival for the Arts were interviewed and expressed they would be interested in having **heritage themed performances take place under the pavilion**. They would pay to use it on the basis of a park permit fee just as they pay to use River Mill Park. They would also like such performances to be free to those who attend, with funding to pay for the rental of the pavilion from grant and private sources. This suggests that such performances should take place on free admission weekday evenings during the shoulder seasons.
38. Other future **revenue generators** might include canoe, swan boats and row boats on Cann Lake during peak periods.

## 4.3 LONG TERM

39. The train is a 30-minute experience involving a 7-minute ride each way and an opportunity to get off train to view the small museum and water and to watch staff turn the train around. The interviews and surveys indicated a preference for substantially extending the track but this does not appear to be practical. ***A better and lengthier experience is therefore required when people get off the train.*** One suggestion is that more visitors to the Village and Train should deliver more potential visitors to a private sector boat operator to coordinate a boat tour, potentially to include a stop at the downtown Huntsville dock. This would make the train ride more worthwhile for more visitors. We understand that there was previously a boat but no consistent coordination of schedules for the boat operator and the train in the past. A dock and stairs need to be offered as part of the capital development project.

# 5. FINANCIAL PROJECTIONS

This chapter sets out order of magnitude estimates of the capital costs associated with the assumed capital improvements at Muskoka Heritage Place/Park (MHP) as well as projected attendance, operating revenues and expenses assuming implementation of the plan in the short, medium and long terms. The short-term is defined as within 1-2 years, medium term as 3-4 years and long-term as 5-7 years. The short-term corresponds to Phase 1, medium term to Phase 2 and the long-term to Phase 3.

## 5.1 CAPITAL COST ESTIMATES

At this pre-design stage, the capital cost estimates that follow are very preliminary and order of magnitude. More accurate figures will emerge in the design and procurement process. The following table sets out preliminary estimates associated with the assumed capital improvements in the short, medium and longer terms at MHP. The estimates are for a capital investment of \$685,000 in the short-term, \$160,000 in the medium term and \$105,000 in the long term as indicated on the following table to total \$950,000.

<b>Preliminary Order of Magnitude Capital Cost Estimates for MHP</b>		
<b>Short-Term</b>	<b>Cost</b>	<b>Comments</b>
Covered rentals and programming pavilion	\$350,000	Assumes 3,000 sq. ft., including warming kitchen and washroom facilities, table and chair storage. Requires drape to protect for weather
Enhancements to Boles Barn and Church	\$90,000	Priority buildings for enhancements in part because of proximity to assumed pavilion and revenue opportunities associated with it. Assumes enhancements to existing washrooms and other additions suggested in this report
Walking, snowshoe, other trails	\$20,000	Can vary widely depending on location, length, landscaping, etc.
Heritage skating rink	\$100,000	Assumes no refrigeration equipment, use only in cold weather conditions, levelling, permanent concrete slab for other uses rest of year, and temporary boards requiring storage
Orientation focus for Museum	\$50,000	Will require orientation video and large outdoor signboard
Lighting, cameras and other security initiatives	\$25,000	Required for year-round operation as a Park and to protect the assets. Electrical linework will need to be buried on heritage site.
Train-related enhancements	\$20,000	Specifics to be determined by management
Site servicing/other enhancements	\$30,000	
<b>Sub-Total Short Term</b>	<b>\$685,000</b>	
<b>Medium Term</b>	<b>Cost</b>	<b>Comments</b>
Heritage themed playground	\$90,000	Premium above \$75,000 estimate for common playground to offer heritage character
Enhancements to other Village buildings	\$50,000	Specifics to be determined by management
Other enhancements	\$20,000	
<b>Sub-Total Medium Term</b>	<b>\$160,000</b>	
<b>Long Term</b>		<b>Comments</b>
Dock, stairs and other enhancements for private boat operation	\$30,000	Will require time to build confidence for private investment. This idea assumed for purposes of projections but main point is need for something to do when people get off the train
Enhancements to other Village buildings	\$50,000	Specifics to be determined by management
Other enhancements	\$25,000	
<b>Sub-Total Long Term</b>	<b>\$105,000</b>	
<b>Total Capital Investment</b>	<b>\$950,000</b>	

## 5.2 ATTENDANCE, OPERATING REVENUE AND EXPENSE PROJECTIONS

This section sets out our projections of attendance, operating revenues and expenses for Muskoka Heritage Place (MHP) for the opening year and a stabilized year in each of the three assumed phases of the project. The projections build upon a base level of data of 2016 actuals for MHP and take into account the Contextual and Comparables Analysis in Chapter 2, the Market Analysis in Chapter 3 and the phased Assumptions in Chapter 4 and also reflect the judgment and substantial experience of the consultants.

All financial projections are in 2017 constant dollars, which does not attempt to predict future inflation rates, and are for a stabilized attendance year in each Phase, which excludes the opening year. The projections are of earned income minus operating expenses and assumes a continuation of existing levels of government and private support to indicate the additional amount required from government (largely Town of Huntsville) and private sources to break even on operations each year.

### 5.2.1 ATTENDANCE PROJECTIONS

To prepare attendance projections first requires a reasonable definition of who would or would not be defined as a visitor. A core assumption is that Muskoka Heritage Place, to be renamed Muskoka Heritage Park, will function as both a charged admission heritage attraction and a free admission public park, largely at different times of the year. The attendance projections here focus on the heritage attraction and do not attempt to project the number of people walking, jogging, snowshoeing or otherwise using the site as a public park. This also allows the projections to build upon the base level of 2016 and previous attendance counts for MHP.

For the purposes of this analysis a visitor is someone who experiences MHP, including the Village, the train operation or both. Persons who attend evening rental opportunities are included in the definition as they would be categorized as part of an “indirect paid” admission category, along with program participants. Persons who may enter only to purchase items in the Museum gift shop are not included and neither are staff and volunteers or service and delivery people. While outreach and access through a web site are important, the attendance projections do not include outreach programs or web site hits/visits.

#### Methods and Benchmarks for On-Site Attendance Projections

Although each has its weaknesses, a variety of methodologies are used to establish benchmarks to inform our judgment regarding the likely levels of attendance at MHP during each phase projected. Some of these methods are quantitative, but some are qualitative; in any case, it must be noted that there is no simple scientific formula that leads to credible attendance projections. The process considers average attendance figures for medium-budget museums in Ontario, other regional attractions, and most importantly, other comparable heritage/pioneer villages in Ontario. These institutions provide benchmarks for formulas for a stabilized year of operation for MHP, assumed to be Year 3, and that help to guide our judgment.

It must also be emphasized that comparing attendance levels from other institutions is often risky because there are a variety of definitions of what constitutes a visitor and no complete certainty that the comparative attendance figures reported are accurate. Moreover, there are differences in admission charge structures and substantial variations in the nature of the visitor experience offered. To address the weaknesses inherent in such ratios and formulas, the section below offers our judgment regarding the impact on attendance of a variety of key qualitative factors.

The benchmarks used in this study to help inform attendance projections are as follows:

#### Based on Average and Median Figures for Ontario, Canadian and US Museums

- Chapter 2.1 sets out data regarding average and median figures for museums in Ontario, Canada and the United States. The rounded attendance figures for each are 17,900, 23,000 and 26,500 visitors, respectively, or an average of **22,500** visitors compared to the base level 11,000 attendance level for MHP.

#### Based on Ranking against Other Selected Muskoka Region Attractions

Chapter 2.3 sets out data regarding other selected museums and attractions in the Muskoka region. The three highlighted are all seasonal operations. Their attendance levels are as follows:

- Santa's Village: 87,000 visitors
- Johnston's Cranberry Farm: 30,000
- Museum Steamships Discovery Centre: 8,800

The existing MHP already attracts more visitors than the Steamships Discovery Centre but we do not believe that it will attract as many visitors as the always free entry Cranberry Farm and far fewer than the more mass market Santa's Village. The mid-point between the Discovery Centre and Cranberry Farm attendance is **19,400**. For the purposes of these projections we will use this figure.

#### Based on Extrapolation from Comparables Analysis

Five comparable villages were analyzed in Chapter 2. Of the five, only three are useful for the purposes of the attendance projections. These are the Fanshawe, Lang and Westfield Villages. The Country Heritage Park is primarily a rentals venue while the data for Founders Museum and Pioneer Village is skewed by free admission.

The two most common methods of attendance projections for museums based on comparable institutions are based on the size of the exhibition space and the size of the resident population. Both methods are not useful in this case. Regarding exhibition space, the method is of little value for heritage villages in which the attractiveness to visitors is not really based on exhibition space. Of some benefit might be the number of heritage buildings and although weak, we have applied a ratio based on the number of buildings. In the case of the MHP the assumption of a seasonal operation and the reality that most visitors will be seasonal residents or tourists leads to a method in which the year-round population of Muskoka District (60,600) and the seasonal resident population (75,600) are combined (136,200). In addition we have applied judgment to rank MHP against the other comparable sites as a third method. The comparables are thus weighted as three methods out of the five used.

- **Extrapolation from Visitors per Building:** The following table indicates a mid-point between the average and the median of 1,208. Applied to the 17 buildings at MHP suggests a stabilized attendance of about **20,500**.
- **Extrapolation Based on Regional Year-Round and Seasonal Population:** Another ratio is visitors per 1,000 residents within the regional (Census Metropolitan Area) population. The following table indicates a mid-point of 95.4 visitors per 1,000 people in the regional population. If we apply this figure to the combined 136,200 year-round and seasonal resident population of the Muskoka District Municipality the result is a stabilized projection of about **12,400 visitors per year**.
- **Ranking of MHP against the Three Selected Comparables:** In our judgment MHP will attract far fewer visitors than experienced by Fanshawe in London and Westfield in Hamilton for a variety of reasons. Both have larger resident markets, full-time staff levels and operating budgets than MHP. Lang in Peterborough has a larger staff and operating budget and a larger resident population but no train, and attracts **20,000** annual visitors. We have estimated the same potential attendance level for MHP assuming the recommended enhancements.

<b>Attendance Extrapolation from Selected Comparable Heritage/Pioneer Villages</b>						
	<b>Reported Attendance</b>	<b>Adult Admission Charge</b>	<b>Reported Number of Buildings</b>	<b>Visitors per Building</b>	<b>CMA Population</b>	<b>Visitors per 1000 CMA Population</b>
Fanshawe Pioneer Village, London	43,000	\$7.00	33	1,303	494,069	87.0
Lang Pioneer Village Museum, Peterborough	20,000	\$8.00	25	800	121,721	164.3
Westfield Heritage Village	45,000	\$11.00	35	1,286	747,545	60.2
<b>Average</b>	<b>36,000</b>	<b>\$8.67</b>	<b>31</b>	<b>1,130</b>	<b>454,445</b>	<b>103.8</b>
<b>Median</b>	<b>43,000</b>	<b>\$8.00</b>	<b>33</b>	<b>1,286</b>	<b>494,069</b>	<b>87.0</b>
<b>Mid-Point</b>				<b>1,208</b>		<b>95.4</b>

### Average of All Methods

As stated, all of the methods used have weaknesses, but are nonetheless helpful in establishing benchmarks. As shown in the following table, *averaging of these methods leads to an attendance figure of about 19,000 annual visitors in a stabilized attendance year in Phase 1.*

<b>Quantitative Method: Based On...</b>	<b>MHP Attendance Estimate</b>
Average and median figures for Ontario, Canadian and US museums	22,500
Ranking against Muskoka regional attractions	19,400
Visitors per building among comparables	20,500
Population figures among comparables	12,400
Rankings against comparables	20,000
<b>Average (rounded) Stabilized Year Phase 1</b>	<b>19,000</b>

### Judgment Regarding Impact of Various Factors on Attendance

While the ratios above help to guide our judgment regarding potential attendance and suggest that attendance levels for MHP will be in the range of about 19,000 annual visitors in a stabilized attendance year in Phase 1 when most of the capital reinvestment, increased staffing and other operational enhancements are assumed to be implemented, as discussed below along with other factors that suggest higher stabilized attendance than indicated from the ratios above for each Phase of development:

#### Phase 1 (Short-Term):

- **Capital Investment:** Those who attend rentals and programs on site are included in the attendance estimates and the addition of the Pavilion and enhancements to the Church and Boles Barn should help to increase rentals and programming attendance levels substantially above current levels and also above the figures suggested by the ratios above. Also positive to attendance are the orientation experience in the museum. Other assumed enhancements to the site include the skating rink, walking, snowshoe and other trails will be of greatest benefit to Huntsville residents who will use the site as a Park, but there should also be benefits to Village and Train visitors.
- **Operational Enhancements:** Free admission to Huntsville residents combined with the capital enhancements above will cause more people to attend the site when operational as a heritage village and therefore counted in the attendance estimates, and also when it functions as a public park. Also positive for both residents and tourists is the modified admission ticket structure, lower admission prices, somewhat increased staff and volunteers and a greater emphasis on marketing.

*As a consequence of these factors, it is our judgment that on-site attendance levels will be somewhat higher than indicated by the ratios above. We estimate a rounded stabilized annual attendance of 22,000 visitors in Phase 1.*

#### Attendance by Subsequent Phase

##### Phase 2 (Medium Term):

*The addition of a heritage themed playground, additional Sunday train operations and heritage themed performances assumed in Phase 2 should allow for a small increase to 24,000 annual visitors in a stabilized attendance year.*

##### Phase 3: (Long Term):

*The main assumption is that of a boat operation or something of equivalent interest for those who exit the train after the seven minute journey from the station to the Lake. Assuming its implementation we estimate an increase in attendance for MHP to 27,000 annual visitors.*

The attendance estimates for MHP, which excludes those who attend when it is largely a public park, are summarized as follows:

<b>Projected Attendance for MHP (stabilized attendance year in each phase)</b>	
Phase 1	22,000
Phase 2	24,000
Phase 3	27,000



## Attendance Segmentation

The following table indicates the estimated attendance segmented into resident and tourist categories. Visitors are also segmented by admission ticket category for the village, train and combination tickets. Since most of the enhancements assumed are to the Village, the projections indicate a growth in Village attendance that exceeds that of the train until Phase 3 with the assumed introduction of a private boat operation or another concept to provide something more substantial to do when existing the Train at the Lake. This is estimated to result in a shift to more train and combination ticket visitors in the long term. Included as well are estimates for indirect paid (programs and rentals visitors) and unpaid visitors.

Attendance Projections (stabilized year, rounded)	Base Level	Phase 1	Phase 2	Phase 3	Phase 1	Phase 2	Phase 3
<b>Projected Total Attendance</b>	<b>11,000</b>				<b>22,000</b>	<b>24,000</b>	<b>27,000</b>
<b>Attendance by Main Segment</b>							
Non-School Resident (Muskoka CMA and Seasonal)	5%	20%	15%	15%	4,400	3,600	4,050
School	10%	10%	10%	10%	2,200	2,400	2,700
Tourist	85%	70%	75%	75%	15,400	18,000	20,250
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>22,000</b>	<b>24,000</b>	<b>27,000</b>
<b>Attendance by Ticket Category</b>							
Village Only	18%						
Adult (25-64)		10%	10%	9%	2,200	2,400	2,430
Senior (65+)		4%	4%	3%	880	960	810
Youth (13-24)		2%	2%	2%	440	480	540
Child (3-12)		2%	2%	2%	440	480	540
Non-School Groups		1%	1%	1%	220	240	270
School Groups		7%	7%	7%	1,540	1,680	1,890
Train Only	32%						
Adult (25-64)		10%	10%	11%	2,200	2,400	2,970
Senior (65+)		5%	5%	6%	1,100	1,200	1,620
Youth (13-24)		2%	2%	2%	440	480	540
Child (3-12)		2%	2%	2%	440	480	540
Non-School Groups		1%	1%	1%	220	240	270
School Groups		1%	1%	1%	220	240	270
Combination Tickets	22%						
Adult (25-64)		11%	11%	11%	2,420	2,640	2,970
Senior (65+)		4%	4%	4%	880	960	1,080
Youth (13-24)		2%	2%	2%	440	480	540
Child (3-12)		3%	3%	3%	660	720	810
Non-School Groups		1%	1%	1%	220	240	270
School Groups		2%	2%	2%	440	480	540
Indirect Paid/Unpaid	28%						
Rentals, Members, Programs, Events, Infants, Free Hunstville Residents, Other		30%	30%	30%	6,600	7,200	8,100
<b>Total Attendance</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>22,000</b>	<b>24,000</b>	<b>27,000</b>

## 5.3 PROJECTED OPERATING REVENUES

The categories of revenue that have been projected for Muskoka Heritage Place/Park (MHP) are as follows. The projections assume a continuation of current private and government support to allow the bottom line to be the amount of additional private support to break even on operations

- Admissions
- Retail Sales
- Food and Beverage Sales
- Facility/Site Rentals and Events
- Public/Educational Programs
- Other Earned Income
- Existing Private Support
- Existing Government Support

Excluded is a membership revenue category because it has been assumed the membership program will be eliminated. This is in part because it has not been successful in the past but most importantly because of the assumption of free admission to Huntsville residents that will reduce the value of a membership program. Instead there will be opportunities to support MHP on the basis of membership in a Friends organization or Foundation.

### 5.3.1 ADMISSIONS

In 2016, MHP earned about \$79,100 in admissions revenue. The previous year was slightly higher with figures a few thousand dollars lower during the previous three years.

It has been assumed that changes will be introduced to the admission charge structure of MHP in the short-term and that prices will increase by \$0.50 per Village or Train ticket or \$1.00 per combination ticket in each of the medium and long terms. The projections for admissions revenue also take into account that prices include HST and that discounts are likely to be offered in collaboration with CAA/AAA, hotels/resorts and other museums on a periodic basis. The combination of HST and discounts is assumed to lower admissions revenue by 16% in Phase 1 and 18% in subsequent phases, reflecting less need for discounts in the opening period.

Admissions revenue is calculated based on the attendance projections and the assumed admission charges and lead to the following projections of admissions revenue.

Admissions: Ticket Categories	Base	Admission	Admission	Admission	Phase 1		Phase 2		Phase 3	
	Level Revenue	Charges (Phase 1)	Charges (Phase 2)	Charges (Phase 3)	Phase 1 Visitors	Phase 1 Admissions Revenue	Phase 2 Visitors	Phase 2 Admissions Revenue	Phase 3 Visitors	Phase 3 Admissions Revenue
<b>Village Only</b>										
Adult (25-64)		\$9.00	\$9.50	\$10.00	2,200	\$19,800	2,400	\$22,800	2,430	\$24,300
Senior (65+)		\$8.00	\$8.50	\$9.00	880	\$7,040	960	\$8,160	810	\$7,290
Youth (13-24)		\$8.00	\$8.50	\$9.00	440	\$3,520	480	\$4,080	540	\$4,860
Child (3-12)		\$6.00	\$6.50	\$7.00	440	\$2,640	480	\$3,120	540	\$3,780
Non-School Groups		\$7.00	\$7.50	\$8.00	220	\$1,540	240	\$1,800	270	\$2,160
School Groups (self-guided)		\$4.00	\$4.50	\$5.00	1,540	\$6,160	1,680	\$7,560	1,890	\$9,450
<b>Train Only</b>										
Adult (25-64)		\$7.00	\$7.50	\$8.00	2,200	\$15,400	2,400	\$18,000	2,970	\$23,760
Senior (65+)		\$6.00	\$6.50	\$7.00	1,100	\$6,600	1,200	\$7,800	1,620	\$11,340
Youth (13-24)		\$6.00	\$6.50	\$7.00	440	\$2,640	480	\$3,120	540	\$3,780
Child (3-12)		\$5.00	\$5.50	\$6.00	440	\$2,200	480	\$2,640	540	\$3,240
Non-School Groups		\$5.00	\$5.50	\$6.00	220	\$1,100	240	\$1,320	270	\$1,620
School Groups (self-guided)		\$3.00	\$3.50	\$4.00	220	\$660	240	\$840	270	\$1,080
<b>Combination Tickets</b>										
Adult (25-64)		\$14.00	\$15.00	\$16.00	2,420	\$33,880	2,640	\$39,600	2,970	\$47,520
Senior (65+)		\$12.00	\$13.00	\$14.00	880	\$10,560	960	\$12,480	1,080	\$15,120
Youth (13-24)		\$12.00	\$13.00	\$14.00	440	\$5,280	480	\$6,240	540	\$7,560
Child (3-12)		\$9.00	\$10.00	\$11.00	660	\$5,940	720	\$7,200	810	\$8,910
Non-School Groups		\$10.00	\$11.00	\$12.00	220	\$2,200	240	\$2,640	270	\$3,240
School Groups (self-guided)		\$5.00	\$6.00	\$7.00	440	\$2,200	480	\$2,880	540	\$3,780
<b>Indirect Paid/Unpaid</b>										
Rentals, Members, Programs, Events, Infants, Other					6,600	\$0	7,200	\$0	8,100	\$0
<b>Total Attendance/Admissions Revenue (before HST/Discounts)</b>										
					22,000	\$129,360	24,000	\$152,280	27,000	\$182,790
<b>Total Admissions Revenue (after HST/Discounts)</b>										
	\$79,100					\$108,662		\$124,870		\$149,888

## 5.3.2 RETAIL SALES

MHP has a small 476 sq. ft. retail space in the museum building and generates some retail sales on site as well. Total sales in 2016 were a rounded \$8,600 when combining the gift shop merchandise and general store revenue categories. At about 11,000 visitors, this translates to about 78 cents per visitor, or \$18.07 per sq. ft. These are relatively low figures compared to museum norms of \$200 - \$300 per sq. ft., or \$1.50 to \$2.50 per visitor.

The assumption is for no change to the size of the retail space but there should be opportunities for increased sales based on higher overall attendance, free admission to the museum and its orientation film. Higher attendance will also expose more visitors to blacksmith created and other products sold on site.

For the purposes of these projections we have assumed a growth to \$1.25 per visitor in Phase 1 and increasing in subsequent phases to reflect better product and market knowledge over time. Cost of goods sold is included with the expense projections later in this chapter. These estimates lead to the following projections.

Retail Sales (476 nsf public space)	Base Level	Phase 1	Phase 2	Phase 3
<b>Total Attendance</b>	11,000	22,000	24,000	27,000
Sales/Visitor	\$0.78	\$1.25	\$1.30	\$1.35
<b>Total Sales</b>	<b>\$8,600</b>	<b>\$27,500</b>	<b>\$31,200</b>	<b>\$36,450</b>
Sales per Sq. Ft.	\$18.07	\$57.77	\$65.55	\$76.58

### 5.3.3 FOOD AND BEVERAGE SALES

MHP generated about \$1,200 in food and beverage sales in 2016, which is in the same general range as experienced in the previous four years. Sales should increase as a result of the increase not only on the basis of an increase in attendance in each phase but also the addition of the covered pavilion, which should help to enhance the variety and quality of food offerings.

Our estimates are set out in the following table with food service cost of goods sold shown in the expense projections later in this chapter.

Food and Beverage Sales	Base Level	Phase 1	Phase 2	Phase 3
<b>Total Attendance</b>	11,000	22,000	24,000	27,000
Sales/Visitor	\$0.11	\$0.22	\$0.24	\$0.25
<b>Total Sales</b>	<b>\$1,200</b>	<b>\$4,840</b>	<b>\$5,760</b>	<b>\$6,750</b>

### 5.3.4 FACILITY/SITE RENTALS AND EVENTS

In 2016 MHP generated a combined \$8,500 from private, Christmas and Halloween events. Amounts varied in previous years.

The introduction of a covered pavilion and enhancement of the nearby church and barn is the primary opportunity for increase earned income identified in this study. Interviews conducted for this study indicated substantial positive feedback to the concept and perceptions that MHP could be a popular rentals venue. However, it is essential that MHP also offer the staff, volunteers, infrastructure, marketing and other resources to lead to positive word of mouth, social media and repeat rentals to sustain this revenue opportunity.

Our estimates are based on estimates set out in the following table and take into account the following information summarized from Chapter 2 of this report:

- Country Heritage Park in Milton reports 17 weddings, 18 other private events and 14 public event days, for a total of 49 major rentals or events.
- Fanshawe Pioneer Village hosted 20 special events and makes four spaces available for rentals.
- Lang Pioneer Village reports a variety of events and rentals, charging very modest amounts for weddings (\$400) and photos (\$50) for the venues themselves but also earns a commission on the catering.
- Westfield Heritage Village hosts a large number of small events and five larger ones each year.

Although the number of events and rentals and the amounts charged for them at MHP may vary widely, our estimates are as set out on the following table for major rentals and assumes a commission on catering is included. These amounts are in addition to the base level of current revenues. The projections also include estimates of smaller rentals at 20% of the revenue for major rentals.

Facility Rentals/Events	Base Level	Phase 1	Phase 2	Phase 3
Existing Revenue from Events		\$8,500	\$8,500	\$8,500
Estimated Additional Major Rentals		25	28	30
Average Revenue per Major Rental		\$1,200	\$1,250	\$1,300
Total Revenue from Major Rentals		\$30,000	\$35,000	\$39,000
Smaller Rentals/Events (@20%)		\$6,000	\$7,000	\$7,800
<b>Total Combined Revenue</b>	<b>\$8,500</b>	<b>\$44,500</b>	<b>\$50,500</b>	<b>\$55,300</b>

### 5.3.5 PUBLIC/EDUCATIONAL PROGRAMS

The assumed pavilion to be added to MHP is not only to provide a venue for rentals it is to provide public and school programming opportunities as well. Educational programs offered in 2016 generated about \$10,400 in revenue. Higher school attendance and increase attendance by the general public should result in correspondingly higher revenue for MHP. It also confirms the need for additional staff and volunteer resources to deliver these programs, and therefore the increased staff resources assumed.

The specific additional public and educational programs to be offered could include performances in the pavilion, summer camps, registered programs, guided tours and others developed by management of MHP. Although revenues may vary widely we assume that they will take time to develop and grow over time as shown on the following table.

Public and Educational Programs	Base Level	Phase 1	Phase 2	Phase 3
Total Revenue	\$10,400	\$20,000	\$22,000	\$25,000

### 5.3.6 OTHER EARNED INCOME

Other sources of earned income reported by MHP in 2016 included membership (\$500), and miscellaneous revenue (\$7,600), or a combined \$8,100. Excluded is a one-time insurance recovery.

There may be opportunities for additional earned income. This might include a periodic fundraising gala dinner, interactive donation boxes, costume rental to allow for pay for photo opportunities, and other ideas to be developed by management and volunteers. Revenues may vary widely and are estimated to lead to grow over time as indicated below.

Other Earned Income	Base Level	Phase 1	Phase 2	Phase 3
Total Revenue	\$8,100	\$12,000	\$15,000	\$18,000

### 5.3.7 EXISTING PRIVATE SUPPORT

Private donations for MHP totaled only about \$400 in 2016, with amounts in the previous four years ranging from about \$350 to \$750. It is important that private support for MHP be increased substantially. This may be encouraged by the menu of sponsorship concept proposed in this study, including support for free admission to Huntsville residents and other proposed enhancements. The Rotary Club of Huntsville as founder of MHP has expressed the likelihood additional support. However, *for the purposes of this study we will not attempt to estimate the value of such additional support to the capital project or to operations. Instead, we will assume continuation of existing private support, at \$400, to allow the bottom line to be the amount of additional private and government support required to break even on operations during the stabilized year in each of the three phases.*

### 5.3.8 TOWN OF HUNTSVILLE AND OTHER GOVERNMENT SUPPORT

MHP received about \$181,000 from the Town of Huntsville plus about \$24,200 from the province of Ontario and about \$4,000 from HST recovery for a combined total of about **\$209,200** from government sources. This amount has been assumed to continue at this level *to allow the bottom line to be the amount of additional private and government support required to break even on operations during the stabilized year in each of the three phases.*

## 5.4 PROJECTED OPERATING EXPENSES

We have combined the numerous operating expense categories used by the Town of Huntsville for MHP into a smaller number. These are as follows:

- Salaries, Wages and Benefits
- Occupancy Costs
- Curatorial
- Exhibitions
- Programs and Events
- General and Administrative
- Marketing
- Retail Cost of Goods Sold
- Food Service Cost of Goods Sold

## 5.4.1 SALARIES, WAGES AND BENEFITS

In 2016 MHP allocated about \$255,000 to staffing costs to cover 1.75 FTE staff and 14 part-time or seasonal staff and relatively few volunteers. The assumption is that there will be one additional full-time FTE to provide maintenance and other assistance to allow the Manager to spend more time on volunteer coordination, program development and other senior level tasks. In addition there will need to be a growth in part-time staff to meet the needs of evening rentals and other services to visitors and to those using the site on a year-round basis as a public park. We have assumed 1.5 additional FTE positions to meet this need.

The staffing costs are in 2017 dollars but it has been assumed that increases, bonuses or other factors will cause these costs will exceed the prevailing rate of inflation by 1% per phase. These estimates and assumptions lead to the following projections.

Salaries, Wages and Benefits	Base Level	Phase 1	Phase 2	Phase 3
Total Salaries, Wages, Benefits	\$255,000	\$257,550	\$260,126	\$262,727
Additional Full-Time Position (1.0 FTE)		\$50,000	\$50,500	\$51,005
Additional Part-Time Staff (1.5 FTE)		\$45,000	\$45,450	\$45,905
<b>Total Salaries, Wages, Benefits</b>	<b>\$255,000</b>	<b>\$352,550</b>	<b>\$356,076</b>	<b>\$359,636</b>

## 5.4.2 OCCUPANCY COSTS

Occupancy costs are generally defined to include all costs, excluding salaries, associated with building repairs and maintenance, utilities, janitorial supplies, security systems and non-employee related insurance costs. In this case security and site maintenance have been separated into other expense categories. For MHP we have combined railway repairs and maintenance (\$9,559) building repairs and maintenance (\$8,299), other repairs and maintenance \$1,884, hydro (\$6,130), water (\$1,042), propane (\$1,949), natural gas (\$772), sewer (\$537), equipment repairs and maintenance (\$405), along with costs for contractors (\$16,065) and property contracted services (\$3,077). These costs combined to be a rounded \$40,200.

These costs will increase on the basis of higher attendance and electricity use for the pavilion, site lighting and security and other site enhancements. For the purposes of these projections we estimate an increase in occupancy costs of 30% in Phase 1, 32% in Phase 2 and 35% in Phase 3, all in 2017 constant dollars.

These assumptions and estimates lead to the following projections.

Occupancy Costs	Base Level	Phase 1	Phase 2	Phase 3
Total Costs	\$49,800	\$64,740	\$65,736	\$67,230

### 5.4.3 CURATORIAL COSTS

The allocation for curatorial supplies in 2016 was about \$600, and in the same modest general range as previous years. These costs are projected to increase slightly to a rounded **\$1,000 per year in each year projected**.

### 5.4.4 EXHIBITIONS

MHP allocated a modest amount of about \$2,700 to displays and exhibits in 2016, with lower expenditures during the previous four years. These expenditures should increase to reflect initiatives to grow attendance levels and help lead to repeat visitation. This includes periodic changes to the museum exhibits and the orientation film. We have assumed increasing still relatively modest expenditures costs ranging from \$10,000 to \$15,000 per year in each phase as summarized below.

Exhibitions	Base Level	Phase 1	Phase 2	Phase 3
Total Costs	\$2,700	\$10,000	\$12,000	\$15,000

### 5.4.5 PROGRAMS AND EVENTS

Costs associated with programs and events at MHP in 2016 included general programming (\$2,066), the Halloween event (\$1,447), Canada Day \$648), Christmas (\$355) livestock (\$2,411) and private events (\$734), or close to a combined \$7,700.

Additional expenditures should be assumed for additional events and more public and educational programs. For the purposes of these projections we estimate a growth to \$15,000 in Phase 1 and \$20,000 by Year 3, as summarized below.

Programs and Events	Base Level	Phase 1	Phase 2	Phase 3
Total Costs	\$7,700	\$15,000	\$18,000	\$20,000

### 5.4.6 GENERAL AND ADMINISTRATIVE

Although every museum-related institution categorizes these costs differently, general and administrative costs usually include office and related supplies, equipment, mailing, printing, telephone, travel, conferences, volunteer perquisites, professional services, dues and subscriptions, etc. For MHP the categories that have been combined under this category include admissions (\$1,254), clothing and safety (\$822), meals and accommodations (\$718), office supplies (\$325), landline telephone (\$1,435), cell phone (\$147), copying (\$125), and volunteer benefits (\$85). Excluded are the amortization expense, the one-time insurance claims and the feasibility study. Combined general and administrative costs are about \$4,900. This is only about 2% of staffing costs when the norm is closer to 10% and reflects services provided to MHP that are expected to continue as well as substantial underspending.



For the purposes of these projections we estimate that general and administrative costs will increase to 4% of staffing costs each year. This leads to the following projections.

General & Administrative	Base Level	Year 1	Year 2	Year 3
Total Costs	\$4,900	\$14,102	\$14,243	\$14,385

## 5.4.7 MARKETING

One of the services provide to MHP is the centralized marketing offered by the Town. The only spending category for MHP that is marketing related is promotion of special events at \$145, or a rounded \$100.

This study has recommended that MHP continue to benefit from the centralized marketing services provided by the Town but also have its own marketing budget. Our recommendations and estimates are as follows.

Marketing	Base Level	Phase 1	Phase 2	Phase 3
Total Costs	\$100	\$12,000	\$13,000	\$14,000

## 5.4.9 RETAIL COST OF GOODS SOLD

Cost of goods sold and other related costs generally range from 50% to 60% of retail sales. For the existing MHP the combined costs of gift shop merchandise (\$3,431) and other (\$239) at a rounded \$3,700 are about 43% of the retail sales.

We have estimated these costs at a more common 50% of projected retail sales in subsequent years, leading to the following projections.

Retail Cost of Goods Sold	Base Level	Phase 1	Phase 2	Phase 3
Total Costs (@50%)	\$3,700	\$13,750	\$15,600	\$18,225

## 5.4.10 FOOD AND BEVERAGE COST OF GOODS SOLD

These costs were \$648, or a rounded \$600, in 2016, which is in the same general range as found in the previous four years and 53% of reported revenues. In general there is a larger mark-up on food and beverage so we have projected these costs as 45% of revenues during each of the three phases, leading to the following projections.

Food/Beverage Cost of Goods Sold	Base Level	Phase 1	Phase 2	Phase 3
Total Costs (@50%)	\$600	\$2,178	\$2,592	\$3,038

## 5.5 SUMMARY OF ATTENDANCE, OPERATING REVENUE AND EXPENSE PROJECTIONS

The table that follows summarizes our projections of attendance, operating revenues and expenses for three phases of implementation of the assumptions set out in this report associated with the future of Muskoka Heritage Place/Park. The projections are in constant 2017 rounded dollars and build on a base level of 2106 figures for MHP.

The projections emerging from this study are that there will be a growth in attendance to the Park when operational as a Village and train attraction from the current 11,000 visitor level to 22,000 in a stabilized attendance year in Phase 1, 24,000 in Phase 2 and 27,000 in Phase 3.

The total operating budget is projected to increase from the current \$325,000 to the \$485,000 to \$513,000 range. Earned income levels plus assumed continuation of current levels of government and private support is estimated to grow from the current \$297,000 to the \$399,000 to \$473,000 range.

The amounts required to break even on operations from additional government and private support each year range from \$86,000 in Phase 1 to about \$40,000 in Phase 3. It is likely that the bulk of the additional funds required will be from the Town of Huntsville. The difference is that MHP is assumed to become a park that will serve residents on a year-round basis and that while functioning as a heritage attraction will offer free admission to the Village for Town residents as the primary funders of MHP.

Summary of Attendance, Operating Revenue and Expense Projections	Base Level	Phase 1	Phase 2	Phase 3	Base Level	Phase 1 %	Phase 2 %	Phase 3 %
<b>Annual Attendance</b>	<b>11,000</b>	<b>22,000</b>	<b>24,000</b>	<b>27,000</b>				
<b>Projected Operating Revenues</b>								
Admissions	\$79,100	\$108,662	\$124,870	\$149,888	24.3%	22.4%	25.1%	29.2%
Retail Sales	\$8,600	\$27,500	\$31,200	\$36,450	2.6%	5.7%	6.3%	7.1%
Food and Beverage Sales	\$1,200	\$4,840	\$5,760	\$6,750	0.4%	1.0%	1.2%	1.3%
Educational and Public Programs	\$10,400	\$20,000	\$22,000	\$25,000	3.2%	4.1%	4.4%	4.9%
Rentals and Events	\$8,500	\$44,500	\$50,500	\$55,300	2.6%	9.2%	10.1%	10.8%
Other Earned Income	\$8,100	\$12,000	\$15,000	\$18,000	2.5%	2.5%	3.0%	3.5%
Existing Private Support	\$400	\$400	\$400	\$400	0.1%	0.1%	0.1%	0.1%
Government Support	\$181,000	\$181,000	\$181,000	\$181,000	55.7%	37.3%	36.3%	35.3%
<b>Total Revenue Projected</b>	<b>\$297,300</b>	<b>\$398,902</b>	<b>\$430,730</b>	<b>\$472,788</b>	<b>91.4%</b>	<b>82.2%</b>	<b>86.4%</b>	<b>92.2%</b>
<b>Projected Operating Expenses</b>								
Salaries, Wages, Benefits	\$255,000	\$352,550	\$356,076	\$359,636	78.4%	72.6%	71.5%	70.2%
Building Occupancy	\$49,800	\$64,740	\$65,736	\$67,230	15.3%	13.3%	13.2%	13.1%
Curatorial	\$600	\$1,000	\$1,000	\$1,000	0.2%	0.2%	0.2%	0.2%
Exhibitions	\$2,700	\$10,000	\$12,000	\$15,000	0.8%	2.1%	2.4%	2.9%
Programs and Events	\$7,700	\$15,000	\$18,000	\$20,000	2.4%	3.1%	3.6%	3.9%
General & Administrative	\$4,900	\$14,102	\$14,243	\$14,385	1.5%	2.9%	2.9%	2.8%
Marketing	\$100	\$12,000	\$13,000	\$14,000	0.0%	2.5%	2.6%	2.7%
Retail Cost of Goods Sold	\$3,700	\$13,750	\$15,600	\$18,225	1.1%	2.8%	3.1%	3.6%
Food/Beverage Cost of Goods Sold	\$600	\$2,178	\$2,592	\$3,038	0.2%	0.4%	0.5%	0.6%
<b>Total Expenses</b>	<b>\$325,100</b>	<b>\$485,320</b>	<b>\$498,247</b>	<b>\$512,514</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Amount/Percentage Required from Additional Government and Private Sources to Break Even on Operations</b>	<b>(\$27,800)</b>	<b>(\$86,418)</b>	<b>(\$67,517)</b>	<b>(\$39,726)</b>	<b>-8.6%</b>	<b>-17.8%</b>	<b>-13.6%</b>	<b>-7.8%</b>

# APPENDIX A: ACKNOWLEDGMENTS

The consultants would like to acknowledge the valued assistance and advice of all those who took part in the Visioning/Assumptions Workshop or were interviewed or consulted as part of the planning process. This includes about 60 persons who attended a public meeting and open house, with about 45 persons attending a second public meeting to provide feedback to consultant recommendations. Particular thanks are extended to Kari Lambe and Teri Souter for their leadership, advice and assistance in coordinating the planning process.

## **Workshop Participants**

- Jason Fitzgerald, Councillor, Town of Huntsville
- Ron Gostlin, Manager, Muskoka Heritage Place
- Derrick Hammond, Director, Development Services, Town of Huntsville
- Kari Lambe, Director, Community Services, Town of Huntsville
- Katie Love, Administrative Assistant, Town of Huntsville
- Scott Ovell, Economic Development Officer, Town of Huntsville
- Greg Pilling, Manager of Sales and Customer Service, Town of Huntsville
- Teri Souter, Manager of Arts, Culture and Heritage, Town of Huntsville
- Bob Stone, Councillor, Town of Huntsville

## **Additional Interviews / Written Feedback**

- Scott Aitchison, Mayor, Town of Huntsville
- Lori Allen, Member of the Public
- Janice Berkenmeier, MHP staff
- Steve Campbell, Member, Huntsville Cultural Tourism Coordinating Committee

- Steve Carr, General Manger, Comfort Inn
- Karen Cassian, Member, Huntsville Cultural Tourism Coordinating Committee
- Denise Corry, Chief Administrative Officer/Clerk, Town of Huntsville
- George Clark, Huntsville Resident, proponent of bringing Dionne Quintuplets Home to MHP
- Lucille Frith, Member, Huntsville and Area Historical Society
- Holly Groome, Curriculum Planner, Trillium Lakelands District School Board
- Hugh Holland, Past President, Rotary Club of Huntsville
- Jamie Hopkins, General Manager, Santa's Village
- Elspeth Hogg, Committee Chair, LACAC/Heritage Huntsville
- Kelly Haywood, Executive Director, Huntsville/Lake of Bays Chamber of Commerce
- Michael Lawley, Executive Director, Muskoka Tourism
- Tricia Markle, Member, Huntsville and Area Historical Society
- Allen Markle, Member, Huntsville and Area Historical Society
- John Miller, President and General Manager, Muskoka Steamships and Discovery Centre
- James Murphy, Executive Director, Explorer's Edge Tourism Region
- Randy Pringle, Front Desk Staff, Deerhurst Resort
- Helena Renwick, Executive Director, Huntsville BIA
- Laura Ross, Tourism Industry Advisor, Regional Tourism Unit, Ministry of Tourism, Culture and Sport
- Brian Tapley, Bondi Village Cottage Resort
- David Topps, Member, Huntsville and Area Historical Society
- Rob Wallace, President, North Muskoka Resorts Group
- Nancy Wegner, Owner, The Nutty Chocolatier



# APPENDIX B: ONLINE SURVEY RESULTS

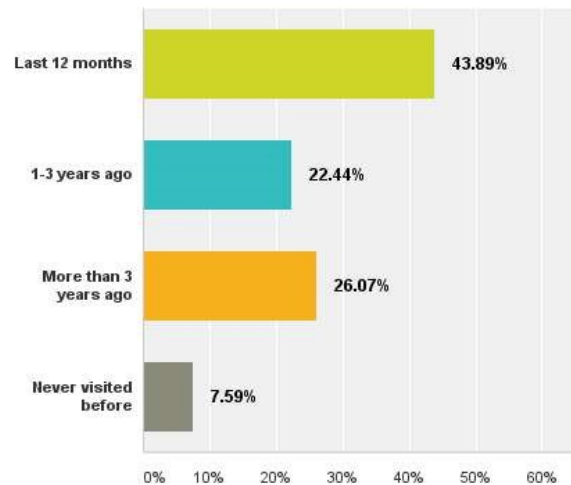
A public survey about the current visitor experience at Muskoka Heritage Place was conducted from January 13<sup>th</sup> to February 11<sup>th</sup> 2017. The survey was available in hard copy and online.

A total of 351 responses were collected. 303 (86%) were valid completed surveys. Approximately 64% of all respondents were permanent Huntsville residents, and 14% were permanent Muskoka area residents. Therefore survey results predominantly reflect the behaviours and opinions of the resident market.

## 5.6 LAST VISIT

All survey participants were first asked to indicate when they last visited Muskoka Heritage Place, if at all. Most of the respondents had been in the last 12 months (44%), and 23% had been 1-3 years ago. For 26% of respondents, it had been more than 3 years since the last time they visited. 8% of respondents had never visited before.

The remainder of the survey was administered based on how respondents answered this question. A separate set of questions were asked of those who had been recently, with questions that focused on their satisfaction with their visit and soliciting ideas for improvement in future. Those who had lapsed (more than 3 years) or who had never been before, were asked a different set of questions. The following provides a separate analysis for each.

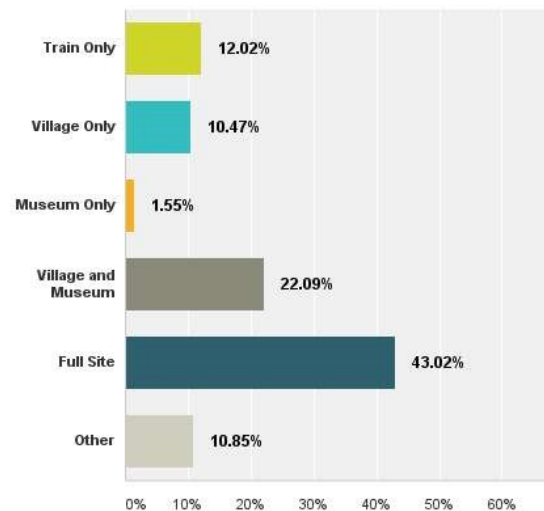


## 5.7 RECENT VISITORS

The following analysis represents the opinions of those visitors who had visited the Muskoka Heritage Place recently i.e. within the last 3 years (201 people). Additional filters have been added to gain particular insights into the opinions of tourists and seasonal residents of Huntsville and Muskoka region (25 respondents) and those under the age of 34 years old (37 respondents).

### ACTIVITIES UNDERTAKEN

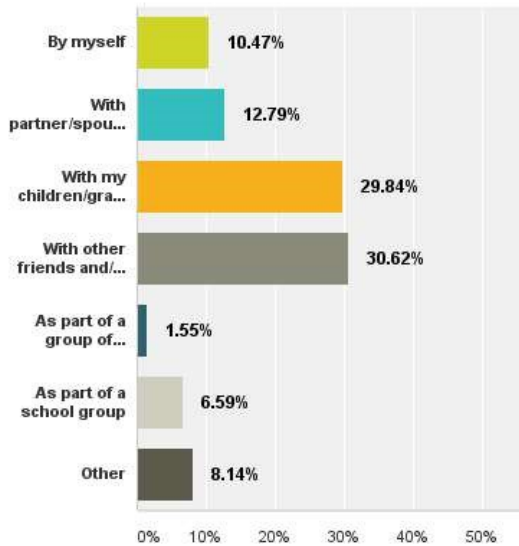
Visitors were asked what they did on their last trip to MHP. Most visitors to MHP visited the entire site while there (43%), while 22% only visited the village and museum. Very few people visit for the Museum only (2%), but 12% of visitors come only for the Train. Other responses showed that 10% of visitors (21 people) came for a seasonal event such as the Easter egg hunt, Halloween event or the Taste the Harvest Event. Other activities included attending a wedding, volunteering (usually former volunteers), and attending a community meeting. Tourists and seasonal residents usually did the full site (56% or 14 people) or did the train only (28%).





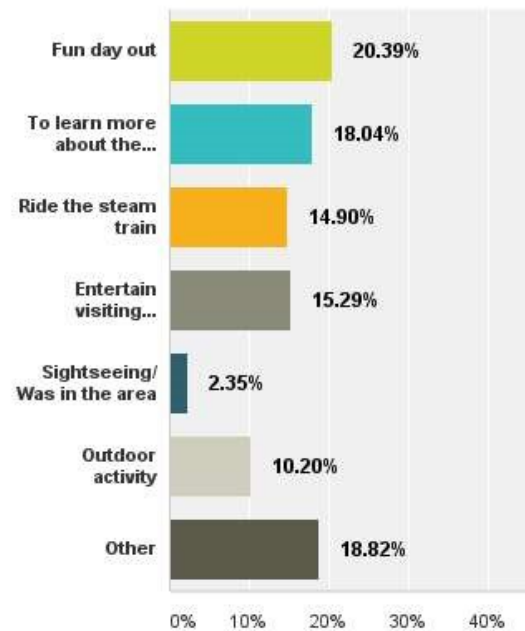
## GROUP COMPOSITION

Most visitors to MHP visit with other friends and/or family (including adult children) (31%) or with their children/grandchildren (under 18 years old) (30%).



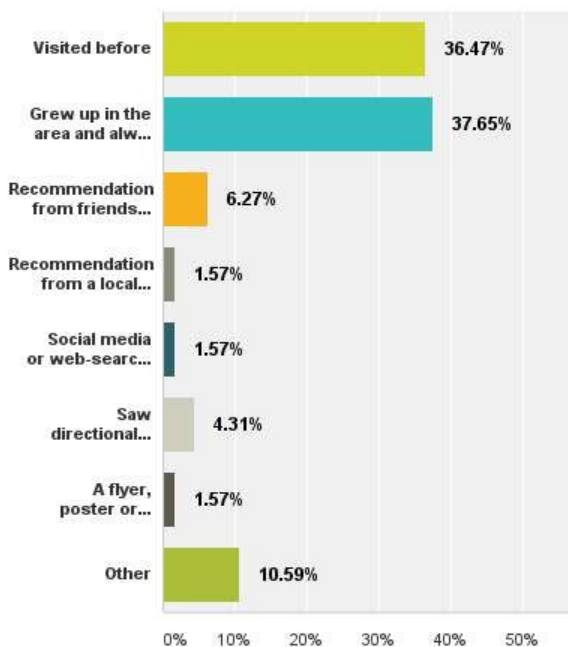
## MAIN MOTIVATION

When asked about their main motivation for visiting, the top answer was a fun day out (20%), followed by to learn more about the history of the area (18%). Other answers included seasonal events (20) - either as an attendee or part of the event crew - weddings (5), school trips (4). For tourists and seasonal residents the train was a key factor in bringing them to MHP (32%), as was a fun day out (27%). For those under 34 years old, it was for a fun day out (24%).



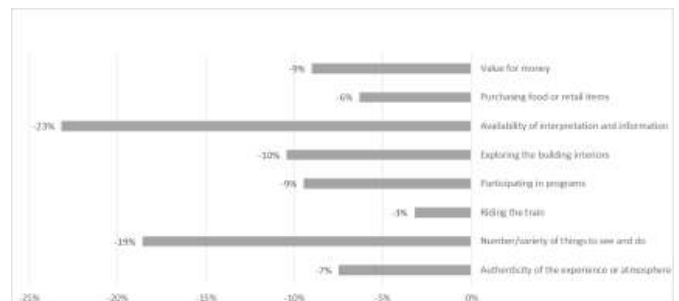
## AWARENESS OF MHP

Participants were asked how they had heard or knew about MHP. Most respondents knew about the attraction because they grew up in the area (38%) or had visited before (36%). Other responses included having familiarity with MHP developed through having been involved in its creation, worked or volunteered there, or knowing someone connected with MHP (11). Two respondents mentioned getting a free ticket with their tax bill.



## IMPORTANCE, SATISFACTION, AND THE GAP

Participants were asked to rate the importance of a series of visitor experience elements on site, and then were asked to rate their satisfaction with these same elements. Mapped together, we can see what is called the "satisfaction gap" - the difference between the two scores. Satisfaction score takes into consideration those who said they were "Very Satisfied" and "Satisfied". The Importance Score takes into consideration those who felt those attributes were "Very Important" or "Important" to the enjoyment of their visit. Those attributes with the largest gap between Satisfaction and Importance Scores highlight those attributes that are a highest priority for improvement because they are not meeting expectations.



From the analysis, we can see that the elements of the visitor experience with the largest gap (i.e. that are of most importance but that are not meeting visitor expectations) are the availability of interpretation and information (-23%) and the number and variety of things to do (-19%). **These areas and the following secondary areas should be a**

**priority for improvement at MHP.** Secondary target improvement areas are exploration of building interiors (-10%), value for money (-9%), and participating in programs (-9%).

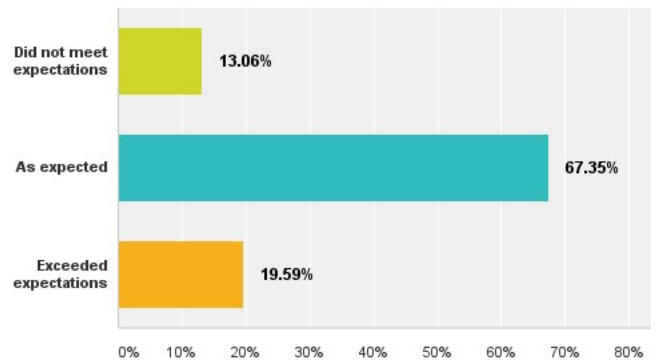
For tourists and seasonal residents specifically, MHP under delivered on the availability of interpretive information (-12%) and the number and variety of things to do (-4%). There was no gap for the train, or participating in programs.

For those under 34 years old, the largest satisfaction gap was for availability of interpretation (-19%), participating in programs (-14%) and the number and variety of things to do (-14%). Value for money had no gap.

## EXPECTATIONS

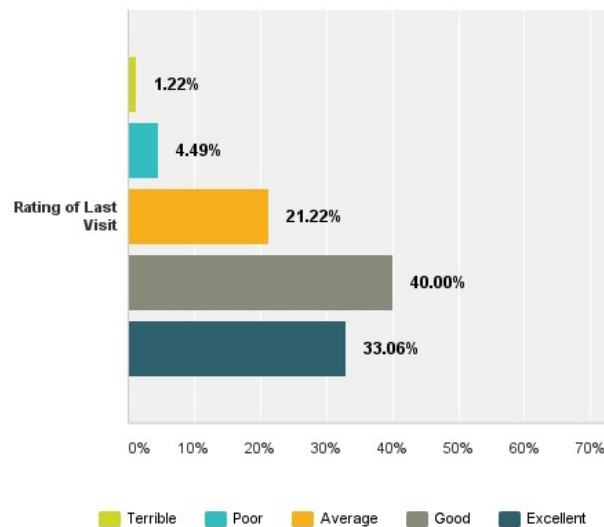
When asked if their visit met their expectations, the majority of visitors said it was as expected (67%). ***Given the high level of familiarity with MHP and support for its continued operation, this level of satisfied expectations is not surprising.***

For tourists and seasonal residents, their visit was as expected (68%). For those under 34 years old, the experience was also as expected (48%), although there was a higher level of exceeded expectations (38%).



## OVERALL VISIT

Overall, visitors rated their visit as “good” (40%) and “excellent” (33%). Tourists and seasonal residents rated their visit higher with 52% saying their last visit was excellent. 81% of those under 34 rated their overall visit as such.



## SUGGESTIONS FOR IMPROVEMENT

Approximately 116 responses were provided with multiple suggestions for improvements from each participant. Suggestions have been grouped into 7 broad categories:

- **Refresh and expand the visitor offer, activate the site and provide a greater level of information and interpretation (46)** – Respondents suggested the following:
  - Have more interpreters (22) to enliven the site, provide information, give tours, do demonstrations, and increase interactivity with visitors
  - Improve the quality of the living history interpretation through training to meet 21<sup>st</sup> century expectations and museum standards – increased enthusiasm, more knowledgeable, better customer service
  - Capitalize on the village as an immersive environment – dress interpreters in period costume, include living elements such as animals and plants, develop a storyline for visitors to follow
  - Provide more hands-on activities (18) and interactive programs, period appropriate activities such as candle dipping, blacksmith shop, herbal gardening, soap making, bread and baking, workshops, Tai Chi classes (2), poetry readings
  - Develop self-guided tours delivered through apps or a handheld device
  - Expand the visitor offer to include more buildings, furniture, and artifacts, increase visitor access to period buildings, provide more information on

- everything including their history, provenance, why they are important
- Refresh museum exhibits and have them change more frequently
- **Increase community involvement by expanding existing events and increasing the number of year-round events (26) to draw them in on a regular basis, with a focus on being family friendly, using the site as a venue for community activity, and creating more volunteer opportunities -**  
Respondents suggested the following:
  - Re-instating special programs that were offered by the Friends of Pioneer Village (2)
  - Expanded and partnership event suggestions included the Christmas train ride, Harvest Festival, Halloween, Maple Syrup Festival and the Easter Egg Hunt
  - New event suggestions included concerts, lumberjack day, Family Day weekend, strawberry social, summer evening dances, square dances, old fashioned afternoon tea, sing-alongs, horse pulls, picnics with pioneer games and/or entertainment etc
  - Focus on off-season events such as a winter carnival, skating parties on the pond, a fire and ice/ski trail through the village and/or snowshoe trails
  - Develop more linkage with community organizations (Muskoka Tourism, BIA, colleges/universities, school boards/co-op programs, horticultural society, churches, service clubs, Muskoka Conservancy
- Act as a venue for events and meetings put on by other groups and businesses including a farmers market, local fair, craft shows, art shows, or encourage local groups to hold their meetings on site
- Create more volunteer opportunities (6) such as interpreters, event staff.
- Encourage local businesses to adopt a building and be responsible for it throughout the year, encourage their staff to pitch in and volunteer
- **Increase promotion of MHP and improve directional signage to the site (18) to increase awareness -**  
Respondents suggested the following:
  - Improve the name
  - Engage professionals to help market the site, promoting key information particularly what it is, and ensure a mixed media approach to engage a wide audience
  - Ensure appropriate directional signage to the site so that people can find it, particularly the train entrance and parking
  - Organize a public education campaign to alert the community to the opportunities for entertainment, pleasure and involvement at MHP
  - Develop a local ambassador program to get residents and accommodation providers to provide good word of mouth suggestions to visiting friends and tourists

- Promote MHP more as a rental venue (6) for weddings, special functions and family reunions, or as a film location
- **Improve and upgrade facilities, visitor amenities and site accessibility, particularly food service and ensure appropriate site maintenance (17)**- Respondents suggested the following:
  - Higher quality and consistent provision of food service (10), particularly coffee and light snacks
  - Modernized museum, facilities and amenities across the site
  - Ensure the site is clean and well maintained - garbage removal, general cleaning, replace swings and flag at school, paint buildings and signs, wash windows, remove dust
  - Address accessibility issues and safety hazards, particularly the path and "very dangerous" steps leading to the church
  - New facilities suggested included a picnic area (5), particularly in proximity to washrooms, additional washrooms (2), space for indoor activities (2), a children's playground/splash pad (2)
- **Reconsider the admission price (15) and ticketing structure to increase attendance and provide better value for money** - Respondents suggested the following:
  - A lower price to encourage more people to visit, particularly a better family and seniors rate so that locals could afford to visit more frequently
  - Implement a single ticket (4) for the whole site
  - Make it free (2)
- **Expand train journey and improve scheduling (13)** - Respondents suggested the following:
  - Improve the signage to the train and increase parking information to reduce unnecessary walking for those with mobility issues
  - Extend the train's journey (3) length to go further, perhaps have it circle Cann Lake
  - Expand or readjust the train schedule so that it runs all weekend (3), especially long weekends throughout the summer and fall seasons, instead of just on Saturdays. This would reduce disappointing tourists and weekend visitors. If the train were to be closed down for two days a week, consider mid-week instead
  - Expand the Christmas Portage Flyer event schedule (2), perhaps to include two weekends, afternoon and evening, Friday night and Saturday.
  - Consider implementing appointed/reserved times (2) for the Christmas Portage Flyer event so people are not standing in line for up to two hours in the cold with children.
  - Consider developing other train-related events such as "A day out with Thomas the Train".
- **Reach out to schools to encourage class visits to emphasize the roots of region and attract families (5)** - Respondents suggested the following:
  - Develop school programs to encourage class visits from local schools
  - Take advantage of the proximity of the high school - encourage students to complete their 40 hours of community service at MHP, develop student projects, perhaps with history staff to undertake research or

create displays, or the woodworking department to build cabinets/storage units, repair buildings

- **No improvements required (5)** – “Muskoka Heritage Place needs no improvement, its fine how it is”

## RECENT VISITOR SURVEY PARTICIPANT PROFILE

Profile of recent visitors included:

- **Age:** The typical profile of respondents to the survey were over 45 years old (65%), with some representation with 35 to 44 year olds (18%) and 25 to 34 year olds (11%)
- **Gender:** The majority of respondents were female 66%.
- **Residence:** The majority of respondents were permanent Huntsville residents (67%), followed by permanent Muskoka area residents (13%).

## 5.8 NON VISITORS AND LAPSED VISITORS

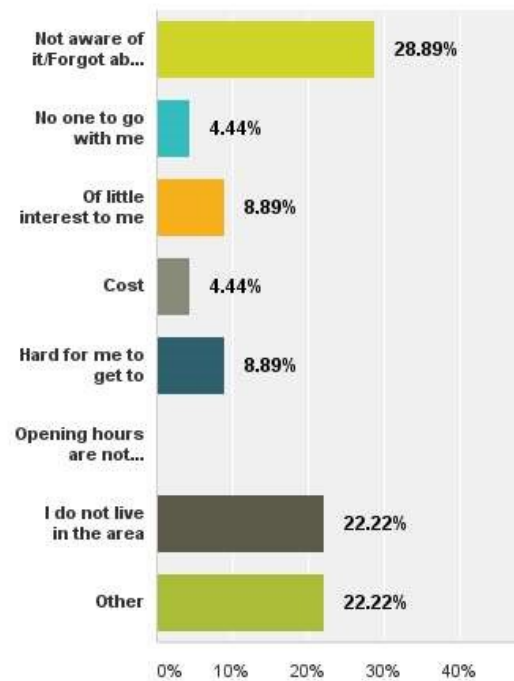
Non visitors and lapsed visitors represent those visitors who have never visited before, or who have not visited Muskoka Heritage Place in more than 3 years. Once identified, these survey participants were asked a separate set of questions.

### LAST VISIT

For 26% of respondents, it had been more than 3 years since the last time they visited. 8% of respondents had never visited before.

### REASON FOR NOT VISITING OR VISITING MORE OFTEN

When asked why they had not visited or visited more often, the top two answers were not aware of it/forgot about it (29%), or that they do not live in the area (22%). Other answers included that they had done it before and it was considered a “one time visit” (4), where other people cited mobility issues (2).





## IMPORTANCE

Survey participants were asked to rate how important certain aspects of the visitor experience were important to their visit at any attraction similar to Muskoka Heritage Place. These scores have been weighted to better differentiate between them, whereby those rated unimportant were given a weighted score of 1 and those rated very important were given a weighted score of 5. The top 3 visitor experience elements considered the most important were authenticity of the experience or atmosphere, exploring building interiors, the number and variety of things to do, and value for money.

	Unimportant	Neutral	Important	Very Important	Weighted Score
Authenticity of the experience or atmosphere	1	2	16	26	199
Exploring the building interiors	2	2	19	22	192
Number/variety of things to see and do	1	3	23	18	189
Value for money	2	4	18	21	187
Availability of interpretation and information	2	9	19	15	171
Riding the train	7	8	10	20	163
Participating in programs	9	15	16	5	128
Purchasing food or retail items	10	17	14	4	120

## SUGGESTIONS FOR IMPROVEMENT

A total of 48 responses were provided with multiple suggestions for improvements from each participant. Suggestions have been grouped into 8 broad categories:

- Refocus and reorientation of the visitor experience, with better interpretation and activation of the site (20) - Respondents suggested the following:
  - Refocus MHP's interpretive framework towards the period 1869-1910 and inclusion of indigenous heritage
  - Further develop the collections (3) including more heritage buildings to see and continued expansion of local historical artifact collection
  - Reorientation of the approach to the site as the museum, village and train are "contrary to the overall image and atmosphere"
  - Relocate the town archives to the site and expand the museum
  - Increase the number of things to do, particularly programs for youth, children and families
  - Provide more hands-on activity (3) and courses, "less telling, more showing", suggestions included geocaching for kids, kite building, arts and crafts, and North House Folk School, John C Campbell Folk School, and Clearing Folk School were referenced as examples
  - Provide more interpretive information about the site, buildings and local history, suggestions for communication included through exhibits, and GPS reactive smartphone apps
- Revive the living history (5) experience to better show how people used to live - including costumed interpreters, performances and demonstrations, food tastings, music, live animals and gardens, the return of Trapper Bob character. An additional suggestion was to have interpretive staff "live" in the village (i.e. temporarily reside in the village for the summer)
- **Greater promotion and marketing of the site (10) and better signage to increase awareness** - Respondents felt there needed to be:
  - More advertising, particularly at key locations like Town Hall, and suggested a simple approach and materials such as pamphlets
  - More details about location and operations available to the public, particularly tourists and those who are not internet savvy, more information about the site and scenery i.e. what's on offer or what the place is about.
  - Regular promotion of events ahead of schedule in order for locals and visitors to plan ahead
  - Opportunity for local sponsorship - period era signs for local shops, or on the train
  - Better directional signage - particularly how to get to the train
- **An expansion of the train experience (5)** - Respondents suggested the following:
  - Extend the train line (3) to make the experience longer and/or twin the train with an additional activity such as a boat ride so that it feels less like an "orphan unit"

- Make the train available on Sundays and holidays so that tourists are not disappointed
- Enhance the vintage films of travelers arriving by train as this is a highlight of the exhibition
- Include a scale diorama to show the full extent of the original train between North and South Portage
- **Reconsider the admission pricing structure (7) to make visiting more attractive** - Respondents suggested the following:
  - Lower the admission price (2) as a strategy to attract more visitors and/or have a couple of free admission days during the season
  - Provide an affordable family ticket option to provide better value for larger groups with children, and make grandparents eligible as adults
  - Promote and encourage season pass (membership) options
  - Make the museum free entry - "it's a small one room display, not worth the \$2.55/adult"
- **Hold more events to attract community visitors and tourists (6) and encourage local groups to use MHP** - Respondents suggested the following:
  - Extend the Christmas train to run all season and bring back the Christmas open house
  - A Marketplace
  - Events such as an old tractor show with working engines, old gun show with muskets, square dance, musical entertainment, Sunday teas, etc.
  - Encourage local groups to use the facility for their activities e.g. quilting
- **Engage children through education (4) programs to encourage learning and repeat visits with parents** - Respondents suggested the following:
  - Partnering with local/district elementary to make a visit to MHP part of the Grade 7 and 8 history curriculum
  - Involve high school students through completing their 40 volunteer hours and creating projects for them to work on such as designing new media and marketing materials
  - Ensure school visits are affordable
- **Generate additional revenues from rentals (2)** - Respondents suggested the following:
  - Target functions such as weddings (in the church), family reunions, corporate picnics

## LAPSED AND NON-VISITOR SURVEY PARTICIPANT PROFILE

Profile of lapsed or non-visitors included:

- **Age:** Typically over 45 years old 72%
- **Gender:** Female 60%
- **Residency:** 54% permanent Huntsville residents, 18% permanent Muskoka residents, 9% tourist

5.9