RTO 9
Regional Tourism
ORGANIZATION

SOUTH EASTERN ONTARIO

Product Development Strategy

Final Report

March 28, 2019

DRAFT REPORT TEMPLATE

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Glossary of Terms and Acronyms

Attraction	A tourist attraction is a place of interest where tourists visit, typically for its inherent or an exhibited natural or cultural value, historical significance, natural or built beauty, offering leisure and amusement.
Business-to-Business (B2B)	Business transacted between companies, rather than between companies and an individual. For instance, business travel services.
Business-to-Consumer (B2C)	Business transacted between a company and private individuals- the sale of holidays, flights and other travel services to individual travellers.
Demand Generator	The attractions, activities, and things to see and do in a region that are the primary motivator for a visitor to travel to that region.
Destination Management Company (DMC)	A professional services company with local knowledge, expertise and resources, working in the design and implementation of events, activities, tours, transportation and program logistics.
Tourism Operator	Tour operators are businesses that combine two or more travel services (e.g., transport, accommodation, meals, entertainment, sightseeing) and sell them through travel agencies or directly to final consumers as a single product (called a package tour) for a global price.
Destination Marketing/Management Organization	Destination marketing / management organizations work with provincial marketing organizations, tourism suppliers, travel trade, operators, associations, regional tourism organizations, legislators and government to collaboratively promote tourism growth within the region.
Destination Marketing Program	Industry-led initiatives that have existed in several destinations and have been recognized by many accommodations and tourism operators as an effective means of supporting regional tourism marketing development.
Earned Media/PR	Publicity gained through promotional efforts other than paid media advertising.
Export Ready	Refers to a business that markets to and through travel trade distribution sales channels, understands commission or net rate pricing, agrees to trade bookings and a cancellation policy.
Fully Independent Travellers (FIT)	An individual travelling and vacationing with a self-booked itinerary.

Glossary of Terms and Acronyms

Market Ready	Refers to a business that markets to potential visitors, that communicates with potential visitors year-round, and is ready to accept advanced reservations.
Tour	Any prearranged (but not necessarily pre-paid) journey (group or FIT) to one or more places and back to the point of origin.
Tourism Value Chain	The sequence of primary and support activities which are strategically fundamental for the performance of the tourism sector.
Tourism Destination	A physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism.
Visitor Ready	Refers to a business which has all of their licenses, permits and insurance in place in order to operate legally.

Table of Contents

Overview

The RTO9 Product Development Strategy includes an introduction and four sections:

- **Introduction** – This section provides a recap of the size and importance of the global, Canadian and South Eastern travel and tourism industries utilizing current available (and historical) data and research. This section highlights the size of the tourism industry and overall contribution to the South Eastern economy and its impact on people, jobs and business in the communities. This section also outlines the history of regional tourism and its challenges and opportunities, highlighting the importance of sustainable tourism on a forward basis.
- **Section 1: Branding** – This section provides detail on the Ontario, South Eastern Ontario region and the sub-regional destination brands, current marketing messages and product focus – connecting the importance of products and experiences with brand.
- **Section 2: Demand Analysis** – This section outlines the key audience and geographic markets South Eastern Ontario should likely target and how their needs and expectations help to identify high-potential product in the region. An assessment of current best practices related to tourism product development highlights common approaches and initiatives around the world.
- **Section 3: Supply and Asset Inventory** – This section outlines the key tourism resources and assets in South Eastern Ontario and how they contribute to product and experience clusters, routings and dispersal patterns. This section helps to identify existing gaps in supply and the necessary skills for improving products and experiences.
- **Section 4: Strategic Recommendations** – This section describes the main strategic recommendations of the RTO9 Product Development Strategy.
- **Appendix** – Supplementary analysis related to key sections.
- **Methodology & Sources**

Product Development Strategy Ambition

In an increasingly competitive landscape, South Eastern Ontario needs to stand out more than ever.

RTO9 Regional Tourism ORGANIZATION

Put simply, product development is the process of identifying tourism product development priorities with the greatest potential to attract key target markets. The process also involves the development of a detailed and outcome-based action plan for implementing those priority product development projects and initiatives.

It's essential that product and experience development fits within the goals of the leading organization to successfully move forward identified initiatives. Regions that can best align their product and experience development –through leadership, research and information, training and development– to leverage their natural strengths will have the best opportunity to achieve competitive advantages in our rapidly changing marketplace.

The current vision and mission of RTO9 reflects the value of partnership and collaboration with the destinations in the region, which is the starting point for a strategy involving many partners and stakeholders.

VISION

To be recognized as the leading strategic tourism partner by destinations in our region.

MISSION

Fostering successful destinations in RTO9 that set the standard in Ontario.

Product Development Strategy Ambition

A three phase strategic process looked at consumer needs and supply across the region.

Building on best practice, RTO9's Product Development Strategy identifies tourism product development priorities and is intended to help create the conditions that address the strategic areas most vital for integrated leisure and business travel experiences across South Eastern Ontario.

Developing the Product Development Strategy for South Eastern Ontario involved a number of steps:

- Assessing the competitiveness of the resources and activities available in the destination and mapping them
- Identifying the key target markets that are high-potential based on the tourism products in the destinations
- Assessing the market readiness of the tourism products – compared to expectations of the target markets
- Identifying the needs and opportunities to best respond to market expectations and create high quality experiences

Phase 1

- **Analysis of Current Needs**

a) Review of best-practice in product development strategies

b) Demand analysis using RTO9 and Destination Ontario Research

c) Supply analysis including in-depth interviews with RTO9 DMOs

Phase 2

Asset Mapping

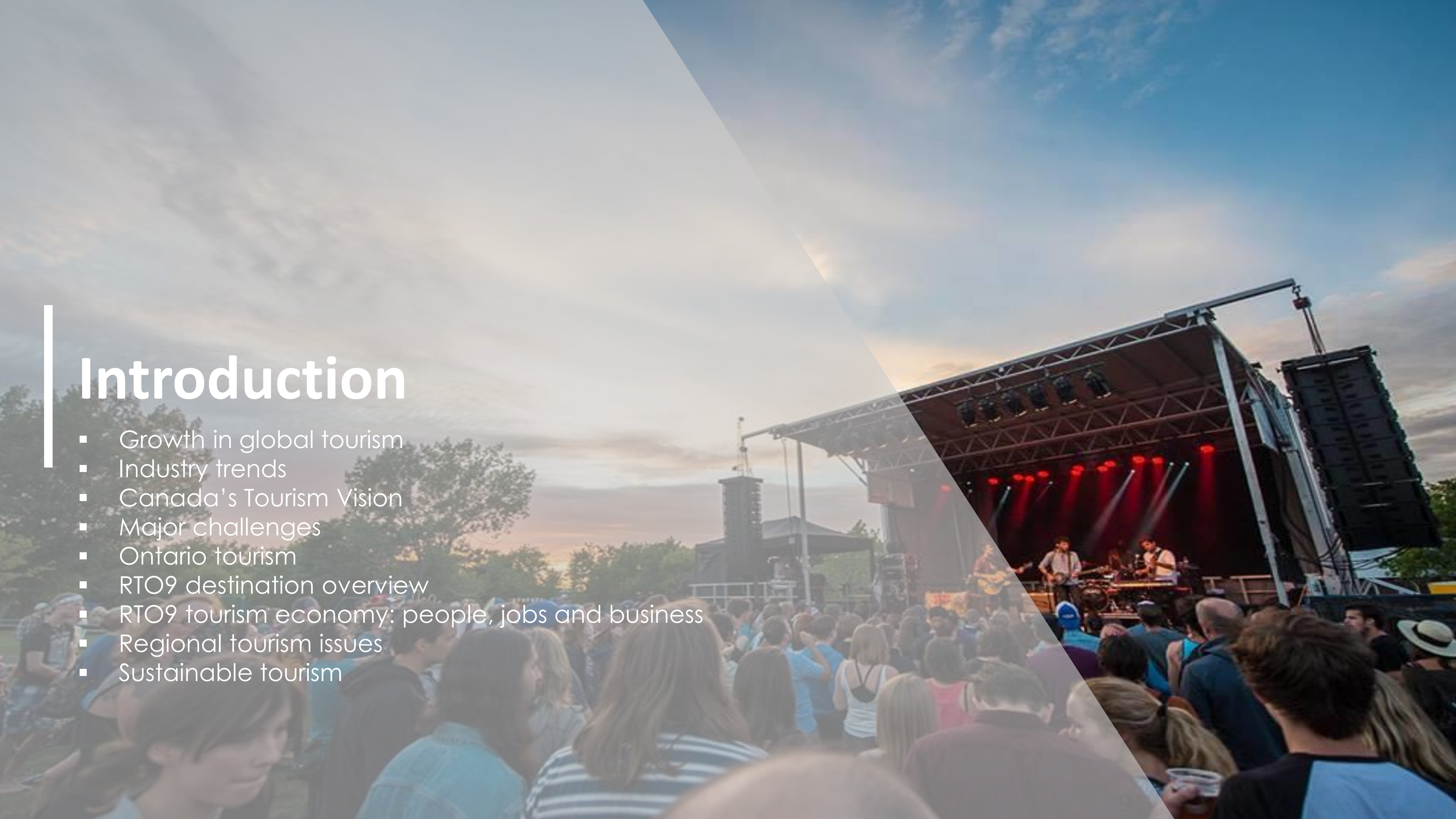
a) Development of comprehensive asset inventory aligned by product category, season, region and market and trade readiness for South Eastern Ontario tourism products and experiences including all attraction, event, festival and tour operator sub-categories

Phase 3

- **Strategic Plan**

a)product development plan including an overall strategy and implementation plan

b)Communication of plan to partners



Introduction

- Growth in global tourism
- Industry trends
- Canada’s Tourism Vision
- Major challenges
- Ontario tourism
- RTO9 destination overview
- RTO9 tourism economy: people, jobs and business
- Regional tourism issues
- Sustainable tourism

Growth in Global Tourism

Globally, the outbound travel market is growing at an average rate of 4%-6% per annum and will top 2 billion international tourism arrivals by 2031.

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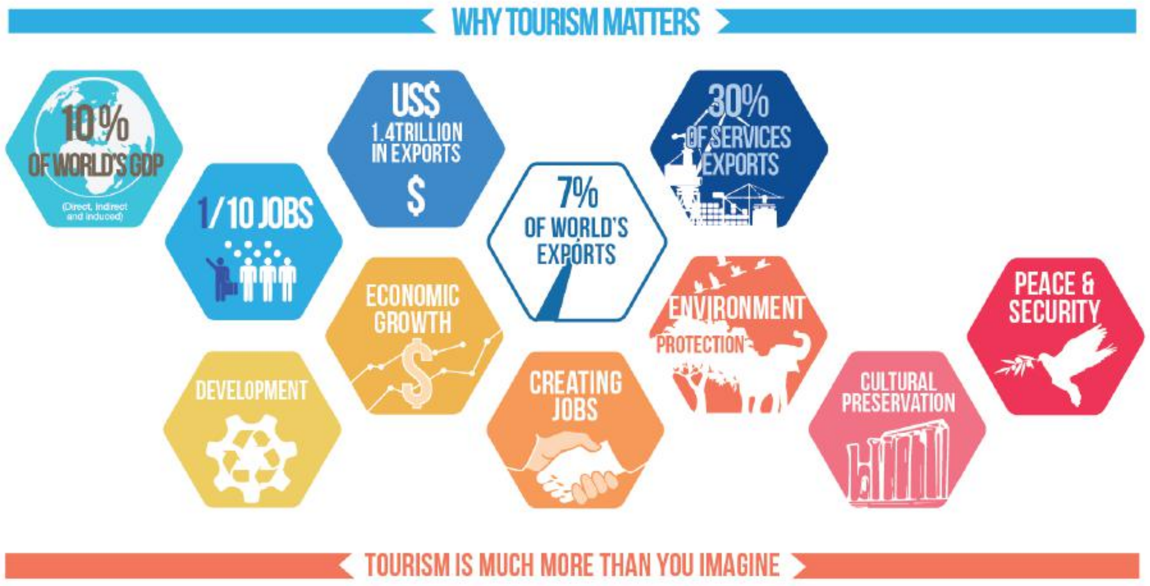
By the year 2031, total international tourism arrivals will reach 2 billion annual trips, up from 1.33 billion trips in 2017. Growth in international outbound travel is booming (averaging 4% to 6% per annum) and will continue to do so with:

1. relatively positive economic growth;
2. increasing wealth generation;
3. easier access to vacation planning through digital technologies; and
4. improving air access.

2017 INTERNATIONAL YEAR OF SUSTAINABLE TOURISM FOR DEVELOPMENT

UNWTO



Sources: UNWTO

Industry Trends

Megatrends based on social, environment and technological disruptions are changing the tourism landscape.

According to intelligence and marketing leader Skift, megatrends are redefining travel.

The New traveller Mindset is characterized by:

1. Authenticity and Trust
2. Travel for personal enrichment
3. Genuine travel brands that care about the customer and the destinations/communities they impact
4. Fulfilling a customer's own quest
5. A return to our ordinary world feeling transformed and inspired

Sources: Skift

Tourism in Canada

Tourism is one of Canada's largest economic sectors.

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With tourism increasing around the world, Canada has also captured a share of growth. The sector outpaced global GDP growth in 2017 and contributed an estimated $27 billion in tax revenues across all levels of government. According to Destination Canada this was a record-breaking year with overnight arrivals of 20.8 million. The number of international arrivals from countries other than the United States also achieved a record high and since then has continued to grow.

Factors such as increased air capacity, favourable exchange rates and a strong country brand have all contributed to international tourism growth. A notable trend within Canada has been a changed visitor mix over the last 15 years; low-yield travellers have been replaced with higher-yield travellers looking for high-quality and immersive experiences.

Canada continues to be recognized as a top destination and has been included in top rankings by The New York Times, Lonely Planet, National Geographic Traveller and Condé Nast.

Sources: Destination Canada

Canada’s Tourism Vision

There is growing evidence that tourism in Canada lags behind peer competitors.

Growth is a positive development for destinations around the world and especially in Canada, as we have seen the positive impacts to jobs and overall economic development. However, a large part of this growth has been concentrated in traditional gateway/destination cities/regions in Canada (e.g., Toronto, Vancouver, Niagara Falls, Banff Lake Louise) and during the summer high-season (i.e., June through September). Despite this, the Federal Government in 2017, launched Canada’s Tourism Vision designed to “bring more travellers to Canada and grow the industry”. The Vision has three ‘ambitious targets’:

By 2025
Competing to be a top 10 international destination

By 2021
Increase international overnight visitors by 30%

By 2021
Double the number of Chinese tourists

Sources: Innovation, Science and Economic Development Canada

Major Challenges

Canada still has challenges related to improving seasonal distribution beyond the summer high-season and regional dispersal beyond traditional urban gateways.

Canada's Tourism Vision presents a number of challenges, including:

- Sustainability: Can Canada's existing destinations manage increasing numbers of travellers in the summer high season – from a capacity, infrastructure, environmental and community perspective?
- Development: What resources are available for Canadian destinations to attract and manage these increasing numbers of travellers including from China?
- Displacement: Will these increasing number of international travellers displace Canadian domestic travellers?

According to the Destination Canada Report *Unlocking the Potential of Canada's Visitor Economy*, to achieve growth – and keep up with up peer competitors like the US, UK, Australia and Japan – these obstacles and challenges specifically related to access, labour, investment and leadership need to be addressed. In response to the report and to continue achieving Canada's Tourism Vision, in late 2018 the Government of Canada announced plans to develop a new national tourism strategy. The strategy process kicked off with the formation of an expert advisory council and country-wide consultations with tourism stakeholders.

Ontario Tourism

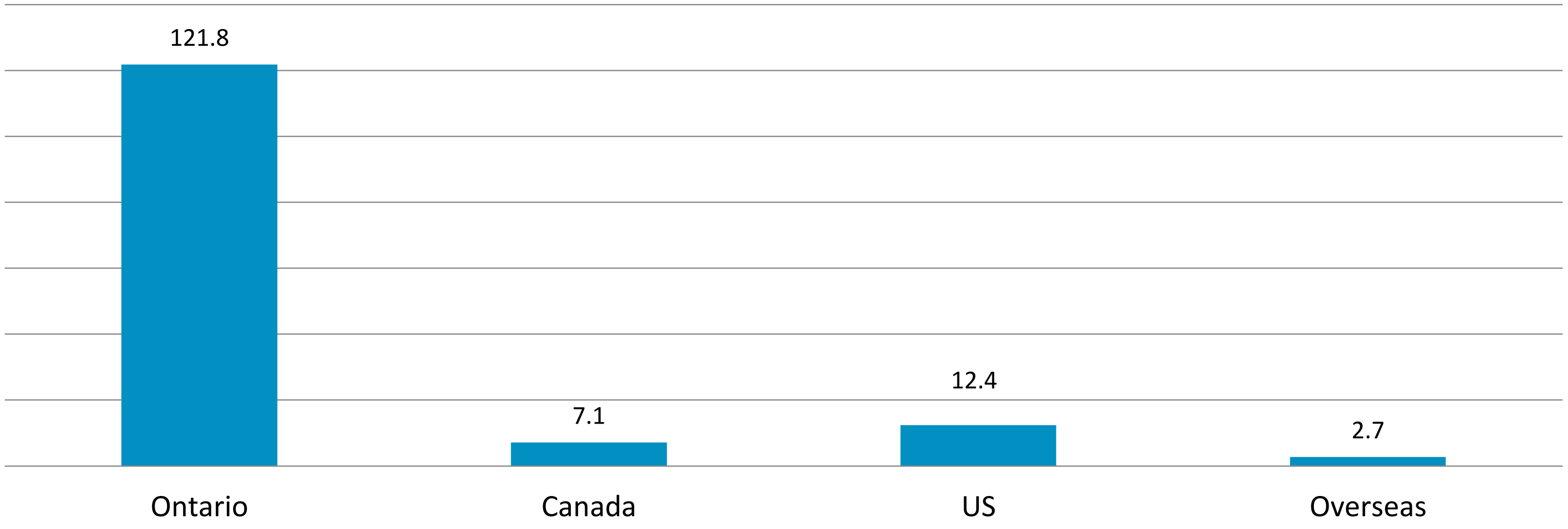
Ontario is recognized as a top destination around the world because of the hundreds of thousands of Ontarians who work in and support the industry.

Tourism in Ontario is highly competitive, in 2016 the tourism industry employed over 390,000 people and contributed $32.7 billion to Ontario's GDP, ranking 7th as an Ontario export. Visitor spending in the province was $26.9 billion; Ontario travellers represented 61% of all tourism receipts, followed by overseas visitors at 18%, US at 13% and other Canada at 7%. For both number of visits and spending, the Ontario traveller market dominates.

The year 2017 represented a record year for international tourist arrivals in Ontario, which was the highest increase (7%) since 2009.

Momentum is expected to continue into 2019. Official data from the Ministry of Tourism, Culture and Sport and Statistics Canada is predicting that the US market will be the most lucrative source market for growth into 2019 (+3.3%); followed by overseas markets (+2.9%) and other Canadian provinces (+1.2%). Ontario will continue to grow modestly into 2019 (+1.5%). Long-range forecasts for Ontario are unavailable at this time.

Ontario Inbound Visits
(2016; millions)



Sources: Ontario Ministry of Tourism, Culture and Sport

Figure 2

Ontario Tourism, cont'd.

The Ministry of Tourism, Culture and Sport has historically played a key role in helping to create an environment that fosters competitiveness and collaboration.

Ministry of Tourism, Culture and Sport

Starting with the release of Ontario's 2009 Discovering Ontario report, the Ministry of Tourism, Culture and Sport (MTCS) launched a number of tools, action plans and strategies to support industry growth, including the creation of 13 tourism regions each led by a Regional Tourism Organization (RTO). A Tourism Action Plan was released in 2015, followed by a comprehensive Strategic Framework for Tourism in Ontario in 2016, to further maximize growth and competitiveness.

In early January 2019 MTCS launched a tourism strategy consultation with the goal of making Ontario a "destination of choice" for tourists and investors. The consultation involves seeking input from visitors, students and industry stakeholders. There are five focus areas for the consultation:

1. Embrace a visitor-first approach
2. Improve the business climate
3. Improve sector alignment
4. Provincial interests and role in tourism
5. Support business and community development

Destination Ontario

As Ontario's lead tourism marketer, Destination Ontario's three-year strategic plan for 2018-2021 is a key document for Ontario's RTOs. Destination Ontario's vision is to position Ontario as a preferred global destination.

The identified strategic priorities for the period 2018-2021 include:

1. Visitor First Marketing: inspiration through passions and interests, coordinated efforts to target overnight visitors, diversity of tourism offerings, leverage of Destination Canada's brand
2. Redefined Partnerships: more alignment and co-marketing
3. Strong Research, Strong Outcomes
4. Dynamic Organization

Sources: Ontario Ministry of Tourism, Culture and Sport, Destination Ontario

Ontario Tourism, cont'd.

The Ministry of Tourism, Culture and Sport has historically played a key role in helping to create an environment that fosters Ontario's competitiveness in tourism.

RTO 9 Regional Tourism ORGANIZATION

Destination Ontario, cont'd.

For the fiscal year 2018-2019, Destination Ontario's marketing focus has been primarily on engaging couples and groups of friends, as these target audiences dominate the overnight leisure travel market in Ontario. The campaign mission statement is "Get Ontario couples and groups of friends to book one additional overnight getaway by intriguing, triggering and creating advocacy for experiences in Ontario". The Canadian and US market approaches and investments are developed based on recent research insights:

Ontario
- Defend against competition and maintain market share

US
- Leverage Destination Canada activities in fly in markets and engage through partnerships

Canada
- Target key Canadian markets including Quebec and British Columbia through partnerships with travel trade

International marketing activities, aligned with Destination Canada's, take place in nine markets: United Kingdom, France, Germany, China, Japan, South Korea, India, Brazil and Mexico. A three-tiered approach is used to define the level of engagement and investment for each of these markets.

Tier 1 includes the markets of Ontario, Quebec, New York City, Detroit, United Kingdom, and China. Marketing activities are undertaken in brand advertising, travel trade and media relations.

Tier 2 includes the markets of Germany, France, Japan, Brazil, and South Korea. Marketing activities are undertaken in partnership with Destination Canada, travel trade and media relations.

Tier 3 includes the markets of India, Mexico and the rest of Canada. Marketing activities are undertaken through media relations.

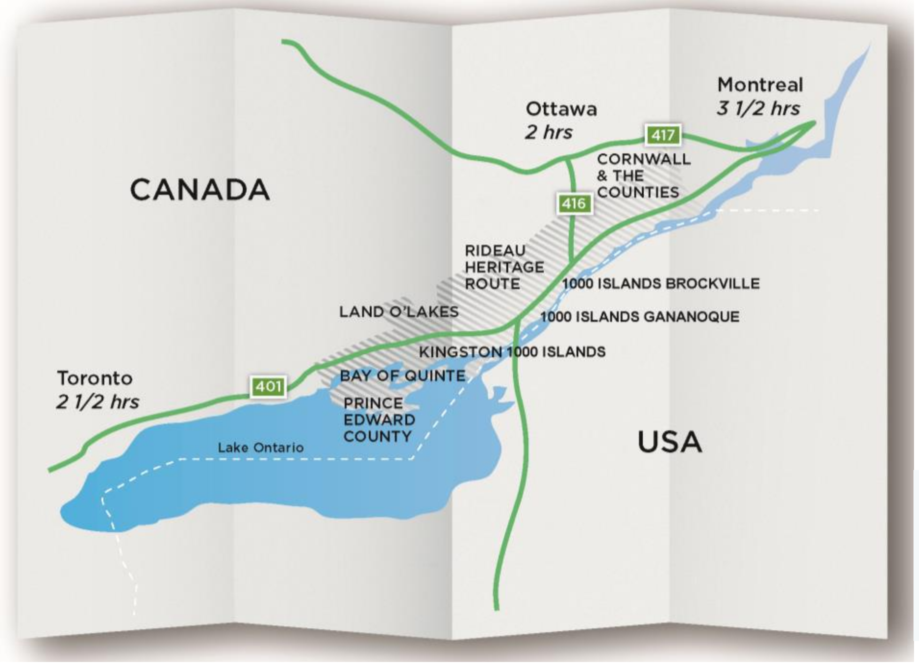
RTO9 Overview

RTO's mission is to foster successful destinations that set the standard in Ontario.

Spanning a vast area, from east of the Bay of Quinte to the Ontario/Quebec border, RTO9 is best known for waterways (lakes, rivers, canals, bays), entertainment, culture and heritage, outdoor adventure and food and drink offerings.

There are eight destinations that make up the region (Bay of Quinte, Prince Edward County, Land O'Lakes, Rideau Heritage Route, Kingston, 1000 Islands Gananoque, Brockville and 1000 Islands, Cornwall and The Counties) with corresponding Destination Management Organizations (DMOs) or Destination Marketing Programs (DMPs) that manage and market their assets. Each of the destinations have their own unique brands with differing levels of consumer familiarity and awareness but some destinations' brands are stronger than others. For example, Prince Edward County, the 1000 Islands region and the Rideau Canal are renowned brands and are well known in places outside Ontario and the rest of Canada.

Through collaboration, partnership and engagement, RTO9's role is to undertake initiatives that support and complement the destinations' work and that of valued tourism organizations across the region.



RTO9 Overview, cont'd.

The overall impact of tourism in the South Eastern Ontario economy is significant and growing in importance.

RTO9 Regional Tourism ORGANIZATION

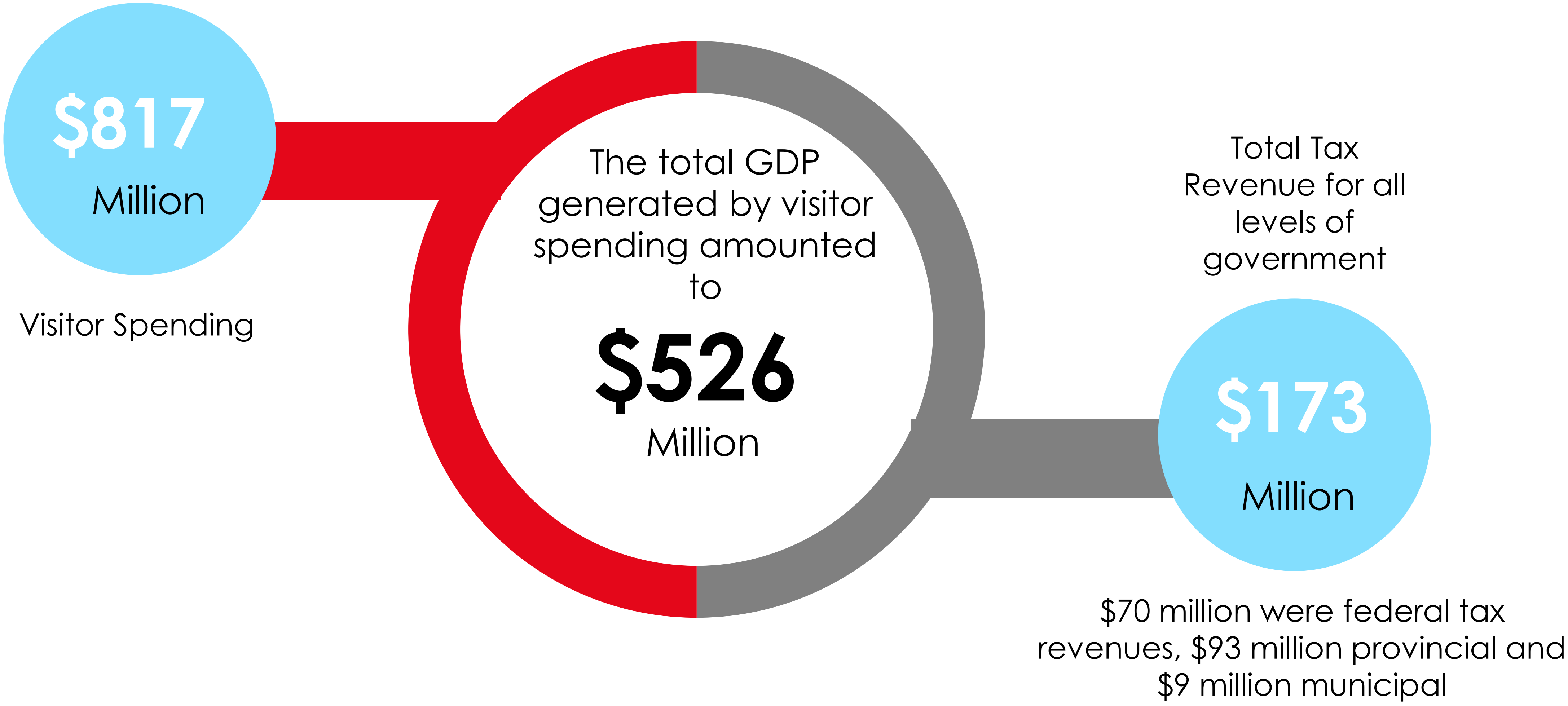


Figure 3: Impact of Tourism in South Eastern Ontario

Twenty31 tourism defined

Sources: Ontario Ministry of Tourism, Culture and Sport; TREIM

RTO9 Overview, cont'd.

The tourism industry plays an important role with respect to employment and resident quality of life.

RTO9 Regional Tourism ORGANIZATION

Delving deeper into the economic impact of tourism, in 2016 the total tourism employment impact was 7,078 jobs and there were 6,645 tourism-related businesses in operation. Direct jobs in industries that are impacted by or participate in the South Eastern Ontario tourism economy increased 5% over a five-year period from 43,187 in 2013 to 45,345 in 2018. The highest concentrations of tourism jobs in the region are shown to be located in Kingston, Belleville and Cornwall.

The occupations that represent the highest percentage of total jobs in tourism are most likely to be in the retail sector. In 2016, retail made up the highest share of tourism related businesses (39%), followed by Food and Beverage (18%), Entertainment and Recreation (8%), Accommodation (5%), Transportation (4%) and Travel Services (1%).

Tourism Related Businesses by type (2016)

	Number of Establishments by Size of Employment						
	Total	0	1 to 19	20 to 49	50 to 99	100+	Share of Total
Total Tourism Related	**6,645**	**2,882**	**3,066**	**491**	**151**	**55**	**-**
Accommodation	346	173	117	34	20	2	5%
Arts, Entertainment and Recreation	512	286	176	40	7	3	8%
Food and Beverage	1,194	298	608	223	56	9	18%
Transportation	233	164	50	12	5	2	4%
Travel Services	71	33	37	1	0	0	1%
Retail	2,607	1,052	1,323	142	53	37	39%
Other Services	1,682	876	755	39	10	2	25%

With varied accommodations, the region offers everything from large branded hotels, farm house stays to charming bed and breakfasts. Following a decline that began during the recession in 2008, hotel occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPar) have been steadily increasing in the region since 2010. RTO9's hotel occupancy averaged 66.7 percent between January to October 2018, up from 63.3 percent during the same period in 2017. The average daily rate (ADR) increased by 5% to $133.90 from 2017.

Sources: Ontario Ministry of Tourism, Culture and Sport, Emsi, CBRE Hotels Trends in the Hotel Industry National Market Repor

Regional Tourism Issues

RTOs provide leadership and coordination to support competitive and sustainable tourism regions in Ontario.

As independent, industry-led and not-for-profit organizations, Ontario's RTOs – including RTO9 – provide leadership and coordination to support competitive and sustainable tourism regions. RTOs collectively have helped to strengthen the voice of tourism in Ontario since their creation.

In 2017/18, RTO9 held strategic planning sessions with members of the organization's Destination Advisory Committee, Tourism Advisory Committee and Board of Directors. The sessions included a review of the organization's vision and mission statements to ensure continued alignment with priorities. As a result of the sessions, both the vision and mission statements were revamped to clearly define RTO9's role within the tourism industry.

The sessions set a strategic path for the organization over a three-year period with both short- and long-term goals, including three key priorities:

1. RTO9 changed from a Marketing organization to a Management organization
2. RTO9 is to be the hub for gathering of data and research
3. RTO9 will focus on supporting product development initiatives (new and enhanced)

The shift from being a marketing organization to a management organization was in part due to the former regional marketing brand 'The Great Waterway' having limited brand recognition in comparison to existing destination brands. Balancing the independent activities and goals of the DMOs and DMPs with the RTO's vision to be the leading strategic partner for the individual destinations continues to be an ongoing challenge and opportunity for regional tourism.

Sustainable Tourism

Sustainable tourism involves a commitment and mindset shift for key stakeholder groups.

Regional Tourism ORGANIZATION

Economic

Tourism is delivering prosperity across the South Eastern economy

Host Community

Residents strongly support and reap the benefit from tourism operating in their communities.

Committed to

Sustainable Tourism

Visitor

South Eastern Ontario delivers world class experiences for international and domestic visitors.

Environment

Tourism is recognized for its contribution to protecting, restoring and enhancing South Eastern Ontario’s natural environment and biodiversity.

Sustainable Tourism

By working strategically and collaboratively, the visitor economy can yield even greater benefits in the future.

Without a doubt, the visitor economy brings many positive benefits to the region today. By working strategically and collaboratively, the visitor economy can yield even greater benefits in the future. Tourism enhances the quality of life for citizens; it helps to protect and foster an understanding and respect for the culture of local communities, builds the conservation ethic of visitors and strengthens and diversifies the economy. A thriving tourism industry can also help the region attract and retain top talent and leading businesses.

However, the visitor economy is not without its challenges. It is clear from looking at other well-known destinations around the world that without proactive visitor planning, monitoring and management, the visitor economy can also bring undesirable direct and indirect impacts to the region, such as:

- Conflicts between residents and visitors
- Increased carbon emissions
- Traffic congestion
- High levels of waste generation
- Higher cost of living (e.g. rent, food)
- Crowding
- Increased costs for policing and emergency response

These are just some of the examples of issues that destinations around the world face in the absence of good planning and management. These issues can undermine the visitor experience, host community support for the visitor economy and, in the long run, investments in the sector.

OVERTOURISM…

Refers to "destinations where hosts or guests, locals or visitors, feel that there are too many visitors and that the quality of life in the area or the quality of the experience has deteriorated unacceptably"

(Responsible Tourism Partnership)

Growing our visitor economy is only relevant if it brings positive benefits. Tourism should always be a driver of positive change.

Sustainable Tourism

Purposeful planning and action today will help to avoid the undesirable implications that could arise tomorrow.

Regional Tourism ORGANIZATION

Planning for the growth of South Eastern Ontario's visitor economy should not, in good conscience, be done without also considering the steps needed to avoid and mitigate the undesirable impacts that can accompany this growth.

As a region, it is recognized that purposeful planning and action today will help to avoid the undesirable implications that could arise tomorrow. Whatever one thinks of the term, "over-tourism" is a real issue facing the industry, and South Eastern Ontario will not be isolated from these issues. Determining whether the impacts are perceptions or facts is often debated. But, in reality, the answer does not matter. If host communities believe there is a problem, it is essential that meaningful action is taken while ensuring objective information is available to support those actions.

South Eastern Ontario is relatively early on in the destination lifecycle. There is room and a desire to continue to grow and strengthen the benefits associated with the visitor economy. As the visitor economy grows, so too will visitation and, without predetermined interventions, so too might undesirable impacts.

As this product development strategy is implemented, visitation will undoubtedly grow and residents will become more aware of visitors and their behaviours, attitudes, benefits and the ensuing implications on their communities. With the concept of over-tourism now mainstream, these residents and host communities will almost certainly be watching for issues, and it can be anticipated that host residents will be more acutely aware of issues arising from visitation.

"Destinations that currently do not have any problems with tourism congestion need to be aware of the potential impact of increased visitor numbers and plan accordingly"

UNWTO, Overtourism (2018)

IMPACT…

to have an effect or influence on. Impacts can be positive or negative. We are focused on maximizing the positive and avoiding or minimizing the negative.

Sustainable Tourism

Destination sustainability will be a core value against which the destination will make decisions and set priorities into the future.

Despite the potential and desire to grow the benefits of the visitor economy, some more established destinations in the region may already be beginning to show signs of experiencing some of the less desirable implications of tourism.

For a quick example, one need only consider the St. Lawrence River and, specifically, the 1000 Islands. This area is an immensely popular peak season destination for boaters, cottagers and water enthusiasts. People travel from afar to enjoy the incredible river and island environment. However, this popularity can, at times, displace local residents from being able to access things like mooring and camping on the islands. Vegetation impacts, garbage and human waste are growing on the islands. The river has become more congested in certain hot spots around Ivy Lea, leading to the feeling of crowding while loud visitor parties in the marinas and at rental properties can become a frustration for nearby locals. For the most part, issues such as these are isolated and have yet to reach a boiling point in South Eastern Ontario. Looking to the future, there is a recognized opportunity and collaborative responsibility to address these and other issues proactively as the visitor economy grows.

In keeping with the shifting mandates of DMOs from marketing to management and marketing, the focus is clearly placed on growing exceptional and sustainable visitor experiences while, at the same time, using the visitor economy as a purposeful tool to elevate the quality of life in host communities. Tourism, for tourism's sake, is not the end goal. Instead, tourism is viewed as a means to bettering the region – economically, socially, environmentally and culturally – for residents and visitors. To do so, destination sustainability will be a core value against which the destination will make decisions and set priorities into the future. Collaborative working between the tourism industry, visitors, residents, and local, provincial and federal governments is essential for understanding the concerns surrounding tourism in the region and for ensuring that the visitor economy is delivered in a way that maximizes its positive benefits to our region while minimizing the undesirable effects.

"Sustainable Tourism provides opportunities for residents to earn a living without having to leave their homes, even in rural and peripheral areas"

Brendan Griffin, Minister of Tourism, Ireland

"Tourism related activity accounts for 8% of global carbon emissions"

Lenzen, M et al. (2018)

Sustainable Tourism

While there is currently a lack of readily identifiable sustainable tourism products and experiences in the region, this does present a possible growth opportunity.

An emerging global tourism trend is the practice of promoting sustainable development. This is commonly achieved by tourism resources actively highlighting their own commitments to sustainable practices. For some visitors, seeing a commitment to sustainable practices can be what fuels their decision to choose a specific place to vacation. For this reason it is important to highlight the lack of easily accessible knowledge about sustainable practices in South Eastern Ontario.

Assets like the Trent Port Marina and Peck's Marina make clear indication on their websites of their membership in the "Clean Marine Program", with the Trent Port Marina even holding the prestigious Blue Flag eco-certification. While other assets like Trailhead Kingston track a clear timeline on their website detailing their commitment to sustainable practices. But this is not the general trend, and even if many regional tourism assets are engaging in sustainable development, their lack of promotion of these activities will make it difficult for visitors concerned with sustainability issues to comfortably visit South Eastern Ontario.

Among the approximately 568 total tourism assets in South Eastern Ontario, only 17 clearly highlight their commitment to sustainable practices on their website or advertising materials. This means that only 3% of tourism assets can be used to promote the region's commitment to sustainable tourism. Of the 17 tourism assets with clear indication of their sustainability alignment, 8 fall into the category of Outdoor Adventure Assets, with the rest spread out, and 0-3 sustainably-aligned assets per tourism theme.

Section 1

- RTO9 Brand
- Sub-Region marketing and focus
- Ontario Brand positioning

RTO9 Brand

The South Eastern Ontario brand is built on the key regional strengths of RTO9, those natural and provided by private and public sectors.

RTO9 Regional Tourism ORGANIZATION

What is a brand?

A brand is a promise to a customer. It is a promise to provide a benefit that the customer values. Having a consistent, credible brand differentiates you from your competition.

Products vs. Brand

A balance needs to reached in using brand to create an image and perception of the destination and actually developing infrastructure and products. Great products and experiences create value and the brand tells the story to communicate that value.

The South Eastern Ontario Brand

On its shores you'll find fascinating history, quaint villages, inspiring art, live theatre and gastronomic delights at every turn. On its waters, enjoy world class sailing, scuba diving, pristine beaches and leisurely cruises. This destination is a relaxing getaway, a break from hectic city life and a place to make amazing memories. Steeped in history, South Eastern Ontario offers something new for you to explore and enjoy.

This beautiful stretch of Ontario is entirely linked by water – from Cornwall on the St. Lawrence River to Lake Ontario's Kingston and on to Belleville on the Bay of Quinte. In between, South Eastern Ontario is dotted by the Rideau Lakes and winds its way north along the UNESCO Rideau Heritage Route.

As you make your way through South Eastern Ontario, you can relax and go with the flow. Hop in the car and choose the scenic route, strap on your hiking boots and take in some fresh air, or set sail and enjoy the wind in your hair. No matter how you choose to explore it, South Eastern Ontario offers some of the best places to visit in Ontario.

RTO9 Sub-regions

Each of the destinations develop and maintain their own identity, product focus and messaging.

Destination	Lead DMO/DMP	Current Marketing Message	Product Focus (based on website categories)	Brand Highlights
Bay of Quinte	Bay of Quinte Regional Marketing Board, Quinte Accommodations & Attractions Partnership	"The region is known as the Walleye Capital of the World and boasts some of the best Walleye fishing around. If you're not an angler, there's still tons to do; raise your glass and find your favourite flavour of craft beer or cider on a Quinte Craft tour, take in a play or enjoy one of the winter festivals."	Culture & Heritage, Sport & Adventure, Food & Drink, The Great Outdoors, Arts & Entertainment, Shop & Stay	From the presence of one of the largest air force bases in Canada, to the traditional First Nations pow wows, to thriving agriculture, farm-to-table meals, and old railways, we have a lot to thank our ancestors for. A sense of adventure leads our visitors into the great outdoors where world-class fishing, trails, and camping offer a natural escape from the big city. The arts and entertainment scene in the Bay of Quinte region boasts varied mediums, engaging events and an unmatched ability to highlight the artisan community spirit of the region.
Prince Edward County	The Corporation of the County of Prince Edward	"No matter what the season is – a visit to The County is time well spent. The island culture thrives during the off season with festivals, ice skating and ice fishing. Make it more memorable and pair it with excellent cuisine and wine from area wineries. Spend time antiquing, boutique shopping, watching local theatre or visiting one of the five museums."	Arts, History & Heritage, Nature & Parks, Cycling, Family Friendly, Festivals & Events, Boating & Fishing, Health & Wellness, Antiques, Shops & Services, Weddings	We're contemporary yet traditional, artistic yet rustic, progressive yet set in our ways and we sit in a charming and picturesque environment of timeless traditions, agricultural land, local foods and wine, artisans, boutiques and sought-after tourism experiences. We embrace local and we take so much pride in the fruits of our labour – from that great glass of wine, farm-to-table produce, culinary experiences, artistic creations and a thriving tourism industry. And yet we are a community of contrasting personalities and characteristics. Residents have a warm sense of pride, authenticity and a willingness to give back to the community.

RTO9 Sub-regions, cont'd.

Each of the destinations develop and maintain their own identity, product focus and messaging.

Destination	Lead DMO/DMP	Current Marketing Message	Product Focus (based on website categories)	Brand Highlights
Land O'Lakes	County of Lennox & Addington	"With over 5000 lakes, you could visit a different lake every day for 13 years! Now imagine those lakes frozen over and covered in a fresh layer of glistening white snow. It's a true winter wonderland and a sight to see."	Arts and culture, beaches parks and trails, camping, food & dining, recreation, programs & activities	"Naturally L&A" and "Unspoiled Moments" Lennox and Addington offers visitors an intrinsic benefit of exploration. Whether it be caves, dark sky viewing, museums, or activities both on the water and on land, visitors should seek to explore.
Rideau Heritage Route	Rideau Heritage Route Tourism Association	"The Rideau Heritage Route follows the historic Rideau Canal as it winds its way through charming countryside from the shores of Lake Ontario in Kingston toward Canada's capital on the Ottawa River. Quaint, heritage villages welcome with warm shops and delicious country fare. This UNESCO World Heritage site is a great place to explore, no matter what season we're in."	Dining, Culinary/Agriculture, tours, culture, indoor activities and entertainment, on the water, outdoor recreation, genealogy	"A World Heritage Destination". The region's assets include authentic arts, recreation, natural and historical experiences.
Kingston	Tourism Kingston, Kingston Accommodation Partners Inc.	"On the picturesque shores of the St. Lawrence River lies the historic city of Kingston. Home to impassioned curators and creators, a place that embraces new ideas – it's authentic, vibrant and never stops surprising. No matter the season; downtown brims with activities, festivals, shops and eateries. And as Kingston boasts more restaurants per capita than nearly any other city in Canada; make sure to come hungry."	Food & Drink, Shopping, Historic Sites, Art & Museums, Sports & Outdoors, Waterfront/cruising	"Kingston Fresh Made Daily" Brand pillars are: Culturally Vibrant, Constantly Evolving, Authentically Hip.

RTO9 Sub-regions, cont'd.

Supporting the destinations helps to enhance the region's diversity of tourism assets and attractions.

Destination	Lead DMO/DMP	Current Marketing Message	Product Focus (based on website categories	Brand Highlights
1000 Islands Gananoque	1000 Islands Gananoque Chamber of Commerce, 1000 Islands Accommodation Partners	"Gananoque and the 1000 Islands is a world-class destination with spectacular scenery, breathtaking water views and endless things to do – no matter what time of the year you visit. Featuring two world famous UNESCO designated sites including Frontenac Arch Biosphere and Rideau Heritage Route and amid the spectacular scenery of lush woodlands, rock and cobalt-blue water, the 1,864 islands that make up the 1000 Islands truly lives up to its reputation as a one of the most beautiful places on earth."	Gananoque Boat Line, Thousand Island Playhouse, Outdoor Activities, Casino, Dining, 1000 Islands Tower, Helicopter Tours, Museums & Galleries, Sports & Recreation	"Canadian gateway to the 1000 Islands" Gananoque and the 1000 Islands is a boater's paradise, fisherman's playground, hiker's haven and a cyclist's waterfront adventure and it's easy to see why it's regarded as one of the most beautiful places on earth. Featuring two world famous UNESCO designated sites including Frontenac Arch Biosphere and Rideau Heritage Route and amid the spectacular scenery of lush woodlands, rock and cobalt-blue water, the 1,864 islands that make up the 1000 Islands truly lives up to its reputation as a world-class waterfront destination.
1000 Islands Brockville	Brockville and District Chamber of Commerce	"Don't let the cooler weather slow you down, Brockville has tons of fun things for the entire family both indoor and out. Start your trip at the Aquatarium, Brockville's popular, interactive discovery center devoted to sharing the history, ecology and culture of the 1000 Islands. From there you can head out to Fulford Place Museum and see the home of a prominent wealthy Canadian family who made their fortune in the late 1800's selling "Pink Pills for Pale People". There are also tons of opportunities to go sledding, skating or cross-country skiing."	Festivals and events, family fun, food & drink, adventure and outdoor recreation, arts, theatre & culture, scuba diving, tours, 1000 Islands, museums & historical sites	Come and visit Brockville, but be warned; once you discover the city's charm and succumb to its hospitality, you will want to stay longer!

RTO9 Sub-regions, cont'd.

Supporting the destinations helps to enhance the region's diversity of tourism assets and attractions.

Destination	Lead DMO/DMP	Current Marketing Message	Product Focus (based on website categories	Brand Highlights
Cornwall and The Counties	City of Cornwall	"Explore an era past in this region that was originally known as Upper Canada. Detour off the main road and take a historical trip to one of the oldest surviving building in Ontario; Sir John Johnson House National Historic Site. A visit to this area wouldn't be complete without stopping into Cornwall for great theatre, galleries, shops and dining."	Arts and Culture, Attractions, Cycling, Family Fun, Fishing, Fun Road Trips, Golf, Heritage, Running, Scuba, Water/waterfront, winter activities	Cornwall is a city that takes pride in being able to combine small-town warmth and hospitality with big-city facilities and services. Cornwall is a natural hub for visitors seeking to explore the City and surrounding small villages. Take the time to explore our attractions, and enjoy a great selection of eclectic shops and wonderful restaurants.

Ontario’s Brand and Identity

Defined by the OTMPC, Ontario’s four brand pillars are: diverse, dynamic, fun and easy.

DIVERSE

Speaks to the range of geographic, cultural and activity based experiences available across Ontario. The diversity Ontario offers is unsurpassed, second to none.

DYNAMIC

Describes Ontario’s seasons, events, multiculturalism and liberal society that combine to create new, quality experiences each day, year-round.

FUN

Is our way of being welcoming, interesting and involving. Ontario allows each visitor to create his or her own personal idea of a great time.

EASY

Is a character trait that describes the wonderful quality of life we share with visitors through a broad variety of experiences that are easily accessible, affordable, and safe.

ONE DISCOVERY LEADS TO ANOTHER

POSITIONING:

Ontario is a big province with a lot to offer. Every region is bursting with its own unique style and charm. Get started with one interest, in one area and before you know it, you’re off to another—because the more you explore, the more you discover.

Ontario’s personality is: Cool. Authentic. Genuine. Welcoming. Real. Exciting. Fun. Refreshing. Relaxing.

Sources: Destination Ontario

Section 2

- Ontario geographic source markets: inbound tourism and forecasts
- Ontario Traveller Segmentation
- Ontario Brand Tracking
- South Eastern Ontario Consumer Insights Survey
- Consumer needs by Traveller Segment
- Product development best-practice tactics

RTO9's high priority products and experiences

To determine RTO9's high priority products and experiences we assessed demand and main consumer needs of domestic and international inbound markets.

Regional Tourism ORGANIZATION

As the global travel industry collectively shifts its mindset to being more sustainable, the concept of the high-potential traveller has gained attention around the world. Tourism Australia and Tourism New Zealand are examples of two best-practice destinations that shifted their strategies from volume-driven to a more sustainable and economically significant high-potential traveller. According to these destinations, these are travellers who spend more in the destination than the average traveller, are aligned with the destination's competitive offering and are interested in the types of products and experiences the destination offers.

With a clear understanding of what RTO9 travellers are looking for and what drives them, regional partners can better work together to ensure investments are strategic from a pan-regional travel perspective - with the ultimate goal of ensuring the appeal of the destination is strengthened for those travellers.

To help achieve this goal, a host of primary and secondary research sources were reviewed to determine the main consumer needs for RTO9's domestic and international inbound markets:

- Market trends
- Destination Ontario's Traveller Segmentation
- Ontario's Brand and Positioning
- Destination Ontario's Brand Tracking Reports
- South Eastern Ontario's Consumer Insights Survey
- Various market profiles on key geographic consumer markets

RTO9 Current Products and Experiences

Niche segments represent a diverse and growing segment of South Eastern Ontario's products and experiences.

Categories	Description	Examples	Global Market Size (where available)	Global Forecast (where available)
Outdoor Adventure	A trip that includes at least two of the following three aspects: participation in a physical activity, a visit to a natural environment and a culturally immersive experience. Includes hard and soft activities.	Hiking, cycling, skiing, golfing, boating, wildlife viewing, fishing/angling, sailing, diving, paddling, skating	In 2013 adventure tourism was valued at US $263 million.	The adventure tourism market is expected to grow at a CAGR of 45.73% during the period 2018-2022.
Entertainment, Culture and Heritage	Tourism focussed on entertainment, cultural, heritage experiences, activities and interactions with the intention to gather new information to satisfy cultural needs, relax and learn.	Visiting heritage sites, artistic and cultural, exhibitions, museums, theatres, galleries/studios, live music and festivals	Global cultural and heritage tourism has an estimated direct benefit of US $625 billion dollars to the global economy.	Average reported global growth rate of cultural and heritage tourism, in terms of visitors, was around 4% per year between 2010 and 2014. Continued growth will be driven by consumer need to connect, interact and engage in unique experiences.
Food & Drink	The act of travelling for a taste of place in order to get a sense of place.	Visiting cooking schools, food/wine/brewery tours, shopping in local grocery or gourmet stores, wine/beer/spirits tastings, festivals and dining in unique food establishments	In 2013 the food tourism industry was estimated to be worth US $150 billion annually.	The global food tourism market is expected to post a CAGR of over 9% during the period 2019-2023.
Agricultural Tourism	The act of visiting a working farm or any agricultural, horticultural or agribusiness operation for the purpose of enjoyment, education or personal involvement in the activities of the farm or operation.	Animal feeding and petting areas, historical interpretation and re-enactments, farm dinners or culinary events, classes, food and farm activities (picking, gathering, processing)	US: In 2012, agritourism operations resulted in US $704 million in sales. Canada: Estimated agritourism sector impact is CAD $1.8 billion on the Ontario economy.	Global agritourism market size will grow by almost US $54.6 billion during 2019-2023.

Sources: Allied Market Research, Adventure Travel Trade Association, American Express, PCMA, UNWTO, WTTC, PATA DNSW, MTR estimates, Music Canada, Global Wellness Institute, World Food Travel Association, Farmer's Markets Ontario, Ag Marketing Resource Center, Technavio Research, Wise Guy Reports, Indigenous Tourism Canada

RTO9 Current Products and Experiences

Indigenous tourism is perceived as a competitive product offering in Canada.

RTO9 Regional Tourism ORGANIZATION

Category	Description	Examples	Global Market Size (where available)	Global Forecast (where available)
Wellness Tourism	Any trip taken with the purpose of improving one's health or well-being.	Visiting health spas and hotels, retreats, health experiences	Wellness Tourism was a US $639 billion market in 2017.	The global market expected to reach more than US $919 billion in 2022.
Business (MICE)	Business travel for meetings, incentives, conventions, and exhibitions (MICE).	Training, tradeshow, annual events, corporate meetings	The global MICE industry generated revenues of US $752 billion in 2016.	The global market is expected to grow at a CAGR of 7.5% to reach US$1.245 trillion by 2023.
Sports Tourism	Sports tourism is travelling to watch a sports competition or game or participate in one.	Watching sports events or playing an individual or team sport	The global sports tourism market size was US $310 million in 2017.	It is expected that by 2022, the market size of sports tourism will reach US $429 million.
Indigenous Tourism	Travel for authentic and quality Indigenous cultural experiences, where the Indigenous community is actively involved in development and delivery.	Performances, workshops, lectures, teaching circles, demonstrations, tastings, community visits, tours, storytelling, displays/exhibits	Canada: Indigenous tourism in Canada contributed CAD $1.8 billion to annual GDP in 2018.	Canada: 1 in 3 international visitors to Canada are interested in Indigenous tourism experiences, especially those from Germany, France and the UK. While Indigenous Tourism is expected to grow, key barriers include access to financing and training.

Sources: Allied Market Research, Adventure Travel Trade Association, American Express, PCMA, UNWTO, WTTC, PATA DNSW, MTR estimates, Music Canada, Global Wellness Institute, World Food Travel Association, Farmer's Markets Ontario, Technavio Research, Wise Guy Reports, Indigenous Tourism Canada

International Inbound Markets

International travellers will need inspiration and help to compel a pan-regional trip to South Eastern Ontario.

Seasonality remains on ongoing issue for South Eastern Ontario. A critical strategy for addressing this challenge and also moving into a higher-yield traveller market is to attract travellers from international markets that have a keen interest in the products and experiences that are available in RTO9 – "high-potential travellers", as noted earlier. Specifically for RTO9, these are travellers who are looking for nature and outdoor experiences, local authentic food & drink and an energizing escape from their daily routine. International travellers are proven to spend more and they travel in Canada for longer than domestic travellers. Convenient access and easy transportation options make it easy for these travellers to get to the region but they will need compelling reasons to extend their trips from the typical two nights or less to a 3-5 day pan-regional trip.

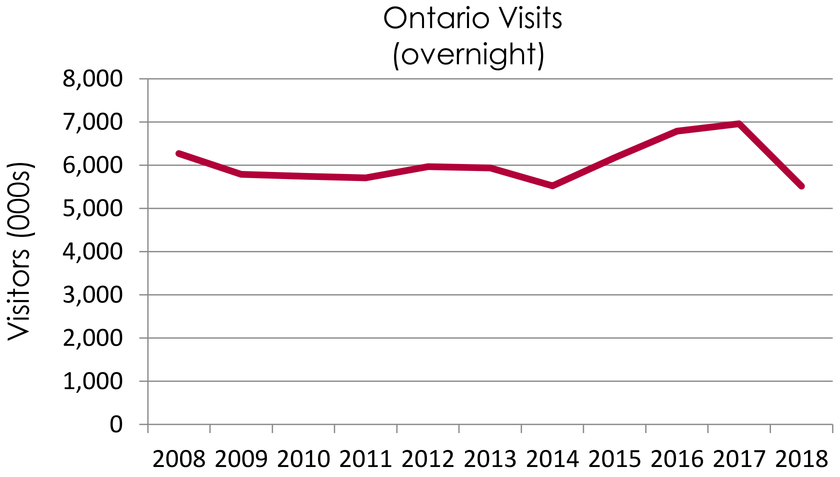
The 10 top international markets that align with Destination Ontario's and Destination Canada's focus markets are: United States, United Kingdom, France, Germany, China, Japan, South Korea, India, Brazil and Mexico. For RTO9, a targeted focus on the most promising top five – United States, United Kingdom, France, Germany and China – would serve the region well as they are forecast to remain the strongest and most promising into the future for the Ontario and Canadian markets. Key trends and current tourism research should guide future decision-making with respect to these source markets and additional ones.

Inbound International Markets: US

US travellers are looking to escape, de-stress and spend quality time with family and friends.

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Safety and security	47%
Value for money	37%
Rich history and heritage	32%
Friendly and open citizens	32%
Good food and wine	31%



* Jan. – Sept 2018

The most recent US tourist arrivals records are said to be related to continued expansion of air capacity between Canada and the US. In 2017 a record was set for the 3rd straight year with 34% of arrivals entering the country by air. In Ontario US overnight visits have remained relatively stable over the last 10 years.

American tourists stay for a relatively short time, at 4 nights, compared to other international travellers. Their spending is $650 per trip to Canada. They are more likely to be older, aged 55+.

American tourists travel to Ontario most often, with Toronto and Niagara Falls as the top destinations visited. British Columbia and Quebec also top the list with Vancouver, Montreal and Quebec City as the most popular cities visited.

Although Americans are increasingly booking through travel agents online, almost half of visitors speak with a travel agent either for research or booking.

Peak travel months for travel to Canada:
→ June
→ July
→ August

Interests from US near market to Ontario:
→ Outdoors
→ Urban Experiences
→ Concerts and Festivals
→ Local food and drink

Sources: Ontario Ministry of Tourism, Culture and Sport, Brand USA, Destination Canada, Destination Ontario

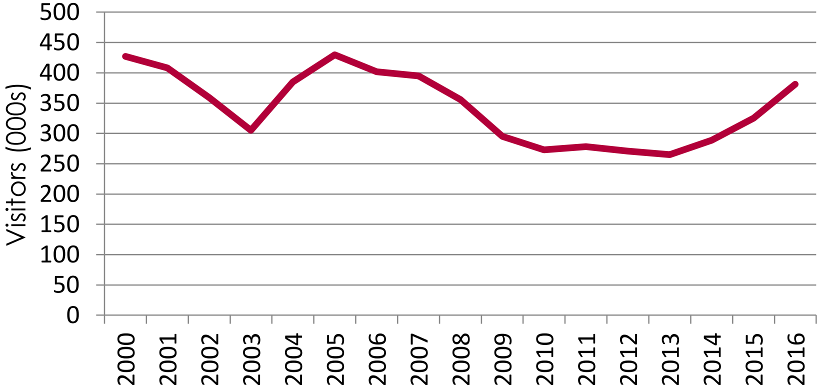
Inbound International Markets: UK

British tourists are known for taking shorter "city break" tours.

Top 5 Motivations for Selecting Last Intercontinental Destination (United Kingdom)

Motivation	% Selected
Local Lifestyle	46%
Cultural Historical Attractions	46%
Beaches/Seaside Attractions	45%
Shopping	31%
Dining/Gastronomy	31%

Ontario Visits
(one or more nights)



Leisure travel and visiting friends are family are the primary reasons UK travellers come to Canada – at almost 40% for each in 2017.

Ontario and British Columbia are the top provinces visited. For cities, Toronto, Niagara Falls, and Vancouver are at the top of the list.

Staying almost two weeks (12 days), UK tourists on average spend over $1,250 per trip.

UK visitors are likely to consult a travel agent for research or booking but they most often book directly with an airline while accommodation is done through an online travel agent. There are direct flights to Ontario from London, Manchester, Birmingham, Glasgow and Edinburgh.

Peak travel months for travel to Canada:
→ Primary: July – September
→ Secondary: April - June

Interests from UK travellers to Ontario:
→ Urban Experiences, Sports Events and Nightlife
→ Natural Attractions
→ Local food and drink

Sources: Ontario Ministry of Tourism, Culture and Sport, Brand USA, Destination Canada, Destination Ontario

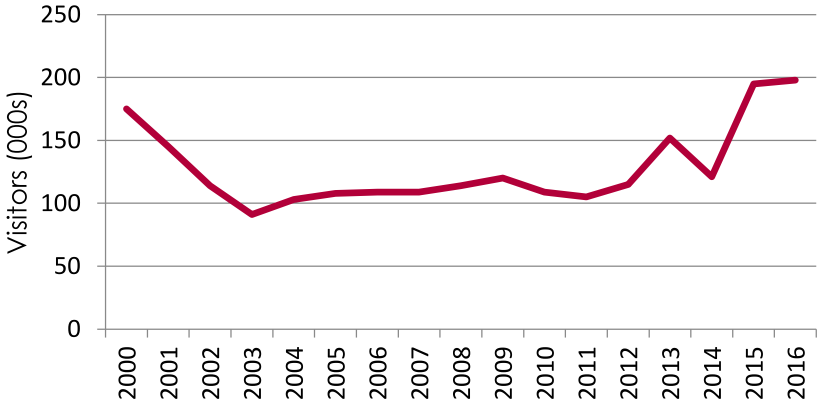
Inbound International Markets: France

French travellers enjoy modern North American cities and want to feel proud about the places they visits.

Top 5 Motivations for Selecting Last Intercontinental Destination (France)

Motivation	% Selected
Local Lifestyle	63%
Cultural Historical Attractions	56%
Beaches/Seaside Attractions	40%
Ecotourism and Nature	36%
Urban Attractions/Nightlife	36%

Ontario Visits
(one or more nights)



On average, French travellers stay 16 nights in Canada, the longest of all of our European markets, and spend over $1,400 per trip.

French travellers increasingly use online travel agencies, however 66% consult a travel agent for their trip to Canada. Flights and accommodation in Canada are mostly booked through travel agents, either online or in-person. There are direct flights to Ontario from Paris, Lyon, Nice, Marseille and Toulouse (seasonal).

French travellers most often visit Quebec and Ontario, with Montreal and Quebec City being the most visited destinations.

French travellers are very interested getting off the beaten path and look for destinations that would make them feel proud to have visited. French travellers place a high importance on the activities they will be embarking on during their holiday and are open to adventure and active vacation packages.

Peak travel months for travel to Canada:
→ July
→ August

Interests from French travellers to Ontario:
→ Iconic Attractions
→ Exploring Culture, Traditions and History (including Indigenous)
→ Hiking or Walking in Nature

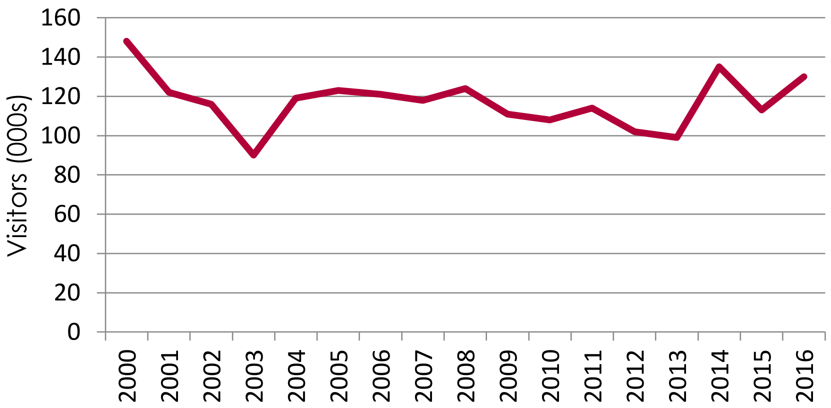
Inbound International Markets: Germany

Receiving an average of six weeks vacation per year, German travellers are considered a key market for off-peak travel.

Top 5 Motivations for Selecting Last Intercontinental Destination (Germany)

Motivation	% Selected
Cultural Historical Attractions	42%
Shopping	40%
Dining/Gastronomy	38%
Ecotourism and Nature	35%
Urban Attractions/Nightlife	34%

Ontario Visits
(one or more nights)



Germany is one of Europe's top three largest outbound markets. German travellers are lucrative due to their average spend of $1,700 per trip. They stay an estimated 15 days when in Canada.

German travellers are looking to escape daily stresses and expand their horizons. Travelling provides German travellers with a sense of achievement.

60% of German visitors consult a travel agent for researching or booking their trip to Canada. Flights and accommodation for trips to Canada are booked equally with a travel agent in-person, a travel agent online, or through an online booking engine. There are direct flights to Ontario from Frankfurt and Munich, and seasonal flights from Berlin.

Peak travel months for travel to Canada:
→ Primary: July – September
→ Secondary: April – June

Interests from German travellers to Ontario:
→ Iconic Attractions
→ Exploring Culture, Traditions and History (including Indigenous)
→ Outdoor activities (Ontario Parks, canoeing)

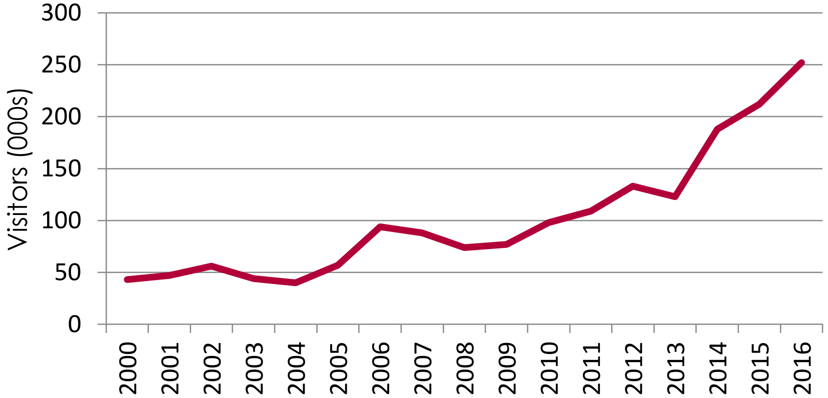
Inbound International Markets: China

Natural attractions rank highly as a motivator for Chinese travellers.

Top 5 Motivations for Selecting Last Intercontinental Destination (China)

Motivation	% Selected
Ecotourism and Nature	73%
Cultural Historical Attractions	67%
Beaches/Seaside Attractions	61%
Urban Attractions/Nightlife	59%
Dining/Gastronomy	54%

Ontario Visits
(one or more nights)



A large portion of Chinese travel in Canada is for the purpose of visiting friends and family (41%) or leisure (25%). Chinese travellers prefer longer trips, staying for around 31 nights and spending on average $2,400 per trip to Canada. Chinese tourists are younger than the average international traveller and are more likely to travel with children.

Chinese travellers are still quite reliant on travel agents, as almost all will consult a travel agent for their trip to Canada, either for research or booking. Flights and accommodations are booked most often through an online booking engine. There are direct flights to Ontario from Beijing, Shanghai and Guangzhou.

Ontario is the most visited and for cities Niagara Falls and Ottawa are the top destinations. 'Poor weather' is seen as a major barrier to visiting Canada especially in the winter.

Peak travel months for travel to Canada:
→ Primary: July – September
→ Secondary: April – June and October – December

Interests from Chinese travellers to Ontario:
→ Natural Attractions
→ Trying Local Food and Drink
→ Iconic and World Heritage Sites

Sources: Ontario Ministry of Tourism, Culture and Sport, Brand USA, Destination Canada, Destination Ontario

Domestic Market

The Ontario market dominates the South Eastern Ontario traveller base.

Ontario holds a strong position among Ontario travellers for short getaways. Given this position, year after year the domestic market provides the vast majority of tourism spending in RTO9. Unfortunately the majority of domestic travel currently takes place during the summer months, adding to the challenge of seasonality.

Ontario will continue to be a high-priority market into the future but consumer needs and expectations differ from international markets. The key area of interest for the domestic market, specifically Ontario, is refining, enhancing and ensuring high-quality products and memorable experiences throughout the region so that value exceeds expectations.

Destination Ontario's Traveller Segmentation and Brand Tracking Reports and the South Eastern Ontario Consumer Insights Survey are filled with insights that are critical for RTO9 for understanding the main consumer needs and identifying gaps and priority areas for future improvement.

Domestic Market: Traveller Segmentation

Traveller segmentation is a widely used tool that helps businesses and organizations to understand their customers better.

Traveller segmentation is an effective way for tourism businesses and organizations to understand their customers better in a quick and easy way. The underlying concept of segmentation is that while all travellers are different, they can be sub-grouped based on shared characteristics such as demographics, geography or psychological factors. This data can be extremely useful in developing a deeper understanding of what consumers want and who is most likely to buy a product, helping businesses shape their products to meet demand.

Today Destination Canada's Explorer Quotient (EQ) and Destination Ontario's Traveller Segment Profiles are the two most commonly-adopted traveller segmentation models used within Canada and Ontario.

	Explorer Quotient (EQ)	Ontario Traveller Segment Profiles
What is it?	Destination Canada developed 13 EQ Profiles for different source markets to help small- and medium-size businesses focus product development, marketing and sales efforts. The EQ provides a deep understanding of the profile and travel behaviours of a destination's best prospective customers.	Destination Ontario developed its own segmentation model – which is largely aligned with EQ – for Ontario destinations and businesses. There are 12 unique Traveller Segment Profiles which were derived from the North American travel population.
Why use it?	EQ enables us to understand why people seek out certain types of travel experiences in order to help develop more insightful truths about how a destination can be relevant, engaging and meaningful as a vacation destination.	Traveller Segment Profiles include travel motivations and interests, media habits and demographics to help businesses engage more effectively with customers, improve marketing and increase industry alignment.
Resource Link	https://www.destinationcanada.com/en/tools	https://www.tourismpartners.com/en/research/traveller-segment-profiles

Domestic Market: Traveller Segmentation

Ontario's Traveller Segment Profiles provide potential benefits for RTO9 due to alignment with Destination Ontario.

Of the 12 unique Ontario Traveller Segments developed there are four key categories that hold the most promise for RTO9:

1. Nature Lovers
2. Up and Coming Explorers
3. Knowledge Seekers
4. Youthful Socializers

The following page identifies the interests and media engagement styles of these travellers.

Domestic Market: Traveller Segmentation

The four key Ontario Traveller Segments comprise 32% of all travellers and 36% of total spend in the North American travel market (Ontario and Near US).

RTO 9 Regional Tourism ORGANIZATION

Traveller Segment	Key Profile Highlights	Audience Targets	Reasoning	% of Travellers	% of Spend
Nature Lovers	Being one with nature and exploring new, undiscovered places off the beaten path are key drivers for this group. Relaxed outdoor activities are preferred over extreme sports. Travel most likely in summer. Typically consists of families, aged 35-55 with kids.	VFR Potential Visitors (couples, families)	This segment is attracted to destinations with scenic beauty, including parks and lakes. They are happy with the basics in terms of travel style because nature and bonding are their priority. The will partake in hiking, canoeing, fishing.	6%	4%
Up and Coming Explorers	Travel is often focused on major attractions and iconic places and they begin with what is nearby. Exploring, learning and feeling excited are core benefits of travel for this group. Consists of young families, aged 25-40 with kids and couples with no kids.	VFR Potential Visitors (couples, families)	This segment will primarily be drawn to the iconic nature of the 1000 Islands but with help they can be guided to explore. Outdoor adventure activities and amusement parks/zoos/aquariums are popular.	9%	14%
Knowledge Seekers	Driven by a desire to explore culture, history, architecture and natural landmarks. These travellers often focus on museums, galleries, historical sites and sightseeing. Mostly couples 55+ years of age, tend to have an above average travel budget.	VFR Potential Visitors (couples, families)	This is a good segment for the region's many performing arts venues, galleries, historic sites and architecture etc.	7%	11%
Youthful Socializers	Having fun, socializing, and feeling connected with close friends are the key drivers. This is a typical youth and student travel segment. It is comprised primarily of young single women aged 18-34 with lower than average income and travel budgets.	VFR Potential Visitors (groups of friends)	This is a prime segment for culture and arts, nightlife, concerts, events and the entertainment scene.	10%	7%
				32%	36%

Sources: Destination Ontario

Domestic Market: Ontario Brand Tracking

Ontario and US near market brand tracking reveals the top associations and potential gaps for Ontario as a travel destination.

As part of Destination Ontario's continuous research, brand tracking is conducted at regular intervals with key geographic markets. The most recent studies, from Summer 2017, assessed overnight pleasure travellers from within Ontario and US near markets. The reports provide insight into consumer perceptions of Ontario as a travel destination, including awareness, image and interest in future travel to/within Ontario. The research does not delve into the actual products and experiences in demand in Ontario or RTO9; it instead tries to show whether Ontario as a travel destination is meaningful, different and top of mind amongst key consumers.

	Ontario Market	US Near Market
Ontario as a travel destination (Top 3 and Bottom 3 associations)	Top: 1. Nature and outdoor activities (70%) 2. Having lots to see and do (66%) 3. A place that you would recommend for a vacation or short getaway (65%) Bottom: 1. Experiencing something new and different (50%) 2. Experiencing different cultures and ways of life (46%) 3. Been there, done that (46%)	Top: 1. Having lots to see and do (50%) 2. Having fun and being entertained (45%) 3. A place that you would recommend for a vacation or short getaway (45%) Bottom: 1. Food, wine and great culinary adventures (39%) 2. Value for money (34%) 3. Been there, done that (28%)
Top words to describe Ontario as a travel destination	Well-rounded (51%) Open-minded (47%)	Cool (38%) Well-rounded (34%)

For both markets growth insights include improving Ontario's awareness and perceptions as a dynamic travel destination.

South Eastern Ontario Consumer Insights Survey

Visiting Friends and Relatives (VFR), sightseeing, culture and heritage, food and drink and the waterfront are the top motivators for travellers visiting the region.

In July and August of 2018 a pilot Consumer Insights Survey was conducted by RTO9 to develop a better understanding of potential and existing South Eastern Ontario visitors. The survey uncovered important insights about how people discover the region and access information about what it has to offer, the process they go through when planning and booking a trip through to the experience they have when in the region.

The target group for the survey was overnight pleasure travellers, which was defined as those who took an overnight trip in the last two years to South Eastern Ontario or plan to take an overnight pleasure trip in the next two years. The respondents were mainly comprised of Ontario travellers from the Greater Toronto Area, Ottawa region and within South Eastern Ontario.

Of particular interest for product and experience development, survey respondents were asked about the primary reason for travel and the actual activities undertaken when in the region. Questions in the survey also asked respondents to identify the reasons they enjoyed their trip to the region and why they would want to return or not return in the future.

A select summary of the most common activities undertaken and key motivators for wanting to return can be found in the following slides. A high-level summary is presented below:

- The primary reason for travel is Visiting Friends and Relatives (VFR). However, there is strong motivation to visit for sightseeing, culture and heritage, food and drink and the waterfront.
- Going to a local restaurant, visiting the waterfront and small towns and villages are the most common activities undertaken when in the region.
- The vast majority of travellers enjoyed their trip for the beauty and attractiveness of the destination visited. Other top reasons for enjoying their trip included: friendly people, good experience and fun, delicious food, many places to visit and beautiful beaches, waterfront and lakes.
- The beauty and attractiveness of the region is the key motivator for wanting to return again. Other top reasons for wanting to return again included: more destinations to explore, enjoyable and fun, fun and exciting activities, easy access/close to home, VFR, water-based adventure activities and winery tours.
- Limited time, money and competing destinations were reasons for not wanting to return.
- Average trip length is 2 nights or less.

Sources: South Eastern Ontario Consumer Insights Survey

South Eastern Ontario Consumer Insights Survey, cont'd.

Going to a local restaurant, visiting the waterfront and small towns and villages were the most common activities undertaken when in South Eastern Ontario.

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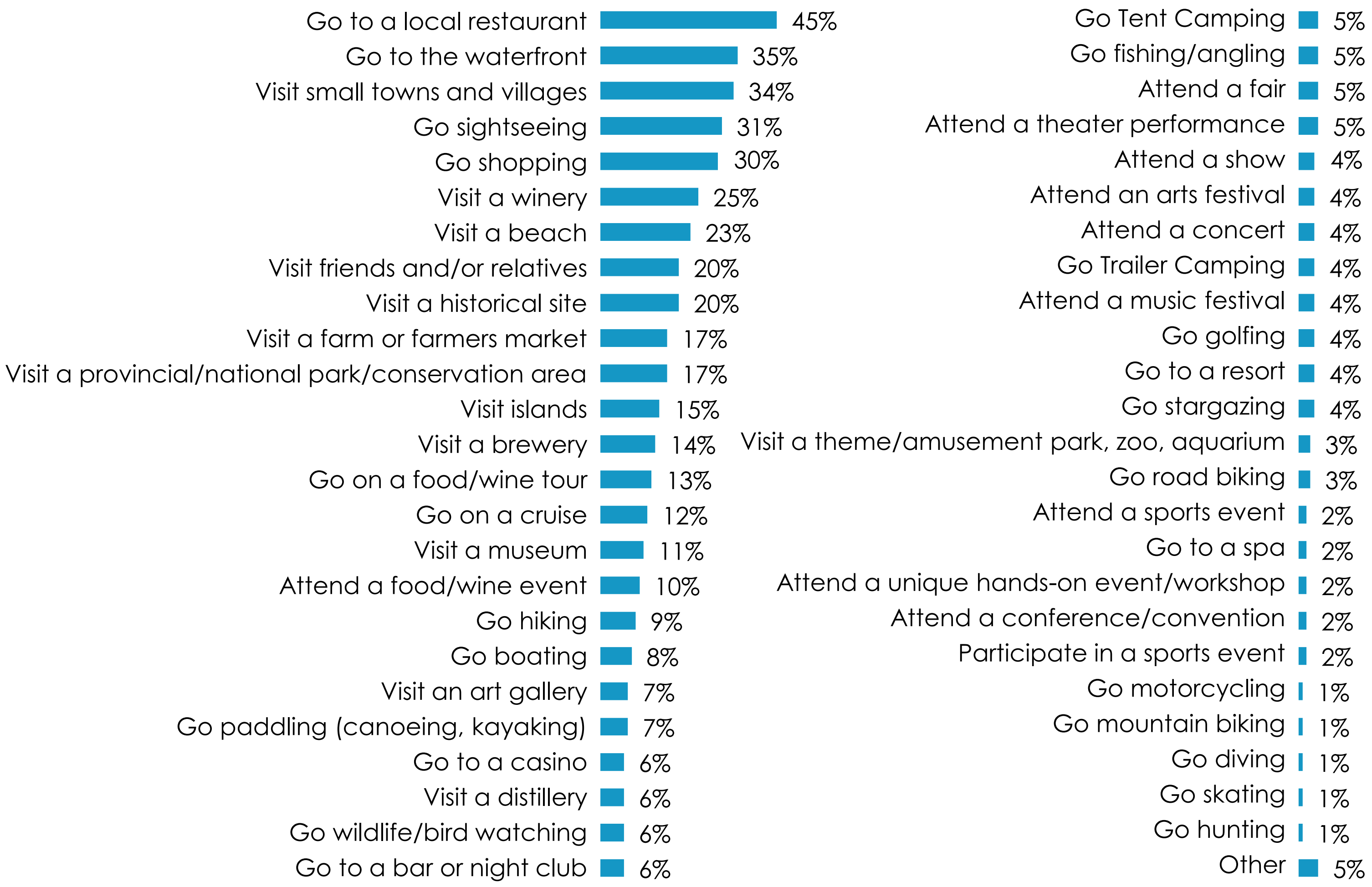

South Eastern Ontario Consumer Insights Survey, cont'd.

The beauty and attractiveness of the region is the key motivator for wanting to return. Limited time, money and competing destinations are reasons for not returning.

1. Beautiful scenery
2. More destinations to explore
3. Visit friends and family
4. Fun and exciting activities
5. Easy access/close to home

Supplementary Considerations

- Winery Tours
- Water-based adventure activities
- Relaxation
- Affordable
- Friendly people
- Camping
- Hiking
- Delicious food

Sources: South Eastern Ontario Consumer Insights Survey

Main Consumer Needs for International Markets

Although there is lots of variation between international markets, activities involving nature and outdoors are top of mind for Ontario visitors.

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Categories	Typical Activities of Interest	Considerations for RTO9
Outdoor Adventure	Visiting natural landmarks, hiking, cruising/boating, paddling, visiting provincial/national park/conservation areas, wildlife viewing, skiing, stargazing	International travellers are looking for authentically Canadian experiences; within Ontario the iconic attractions and natural landmarks they see on social media and those recommended by friends are important. South Eastern would benefit from providing experiences that leverage its natural assets. European outdoor adventure travellers are looking for connection with locals, authentic experiences and varying degrees of mental and physical challenge. Ensuring there is both soft and hard adventure and adequate equipment rental offerings would strengthen the appeal of South Eastern Ontario. Cost is also seen as a barrier to visiting Canada so value for money and quality of products is essential. Bringing more awareness to world class experiences will help to improve the perceptions of South Eastern as a recognizable destination. UK travellers expressed more interest in social and nature based experiences than in high-end restaurants and they value quality local and unique ingredients over 'traditionally' Canadian foods. While festivals and events are not a key activity of interest for some international travellers they are a strong offering for experiencing the local culture of the region. Quality accommodation should be available nearby. Wellness tourism overlaps many other product categories. Nevertheless it is a growing interest for European (France, German) and Chinese source markets and is often most successful when locally focussed.
Entertainment, Culture and Heritage	Shopping, historical sites, museums, urban landmarks concerts, festivals and fairs, art galleries/studios, amusement parks/zoo/aquarium, theatre/performances	
Food & Drink	Local restaurants, visiting wineries/breweries, visiting local gourmet stores, cooking workshops, markets	
Agricultural Tourism	Historical interpretation, farm dinners or culinary events, classes, food and farm activities	
Wellness Tourism	Visiting health spas and hotels, retreats, health experiences	
Business (MICE)	Training, tradeshow, annual events, corporate meetings	
Sports Tourism	Unique Canadian spectator sports and tournaments	
Indigenous Tourism	Small, intimate and authentic experiences	

Sources: Adventure Travel Trade Association, Global Wellness Institute, World Food Travel Association, Destination Canada, Indigenous Tourism Canada, Netherlands Enterprise Agency

Main Consumer Needs for Domestic and US Markets

South Eastern Ontario can better serve its domestic and US markets by differentiating products against regional competitors and offering opportunities for connection.

RTO9 Regional Tourism ORGANIZATION

<table>
<tr><th>Categories</th><th>Typical Activities of Interest</th><th>Considerations for RTO9</th></tr>
<tr><td>Outdoor Adventure</td><td>Visiting the waterfront, beaches, camping, hiking, fishing, cruising/boating, paddling, visiting provincial/national park/conservation areas, wildlife viewing, golfing, skiing, stargazing, backpacking/trekking</td><td rowspan="8">The need for connection and fun with family and friends, a desire to explore, learn, feel excited and relax represents common traits amongst these travellers.

As evidenced in Destination Ontario brand tracking, improved awareness and perceptions of Ontario as a dynamic travel destination is an area for growth. For RTO9 developing an expertise in intimate, small experiences will help to strengthen its appeal to these groups. These travellers want to feel they are exploring undiscovered places and getting off the beaten path.

US outdoor adventure travellers view UNESCO heritage sites and protected areas positively. They also require more sophisticated soft infrastructure compared to other travellers.

Festivals and events across all product categories are a major draw for the domestic and US market, but differentiating what South Eastern Ontario has from other competing regions is critical. Providing ways for visitors to interact and engage with the local community will serve their desire to learn and connect.

A lively entertainment scene, and updated arts, culture and heritage products that have undergone significant investment are an opportunity to stand out amongst other Ontario destinations with more dated product. This will set South Eastern Ontario apart as a trendy, up and coming destination.

Lack of air access and high-speed rail on VIA is a major deterrent for the MICE market. However, there is a market for small-medium sized events that the region could host in its variety of public venues, educational institutions and hotels.

Especially amongst US travellers, there is a significant interest in indigenous experiences - however they need to be authentic and interactive rather than passive.</td></tr>
<tr><td>Entertainment, Culture and Heritage</td><td>Shopping, visiting small towns and villages, historical sites, museums, concerts, festivals and fairs, casinos, live music, art galleries/studios, amusement parks/zoos/aquariums, theatre/performances</td></tr>
<tr><td>Food & Drink</td><td>Local restaurants, visiting wineries/breweries, festivals and fairs</td></tr>
<tr><td>Agricultural Tourism</td><td>Historical interpretation and re-enactments, farm dinners or culinary events, classes, food and farm activities</td></tr>
<tr><td>Wellness Tourism</td><td>Visiting health spas and hotels, retreats, health experiences</td></tr>
<tr><td>Business (MICE)</td><td>Training, tradeshow, annual events, corporate meetings</td></tr>
<tr><td>Sports Tourism</td><td>Hockey, baseball, soccer, curling, sailing etc. spectator sports and tournaments</td></tr>
<tr><td>Indigenous Tourism</td><td>Small, intimate and authentic experiences</td></tr>
</table>

Sources: Adventure Travel Trade Association, Global Wellness Institute, World Food Travel Association, Destination Canada, Indigenous Tourism Canada

Product development best-practice tactics

Regional Tourism ORGANIZATION

- An in-depth review of five destinations was conducted to assess current best practices related to tourism product development.
- Relevant strategies and framework documents were reviewed and analyzed to collect information on the approaches, recommendations, funding allocations and initiatives related to the following jurisdictions:
  - Ireland
  - Scotland
  - Newfoundland and Labrador
  - Alberta
  - Northeastern Ontario
- Additionally, indigenous tourism product development was examined to gain intelligence on the specific strategies, approaches and initiatives underway within Ontario and Canada.
- These destinations were selected based on their relevance for Southeastern Ontario and/or their perception as a best practice leader in the tourism industry.

Product development best-practice tactics: Summary

There were four best-practice areas and approaches that were used to varying extents in the jurisdictions analyzed:

- Government organizations were most likely to take a lead role in determining product focus and developing funding mechanisms but industry and local organizations were relied on to identify and lead development of products and experiences.
- A key critical success factor identified for effectively implementing a product development strategy was the need for an industry wide cultural shift from promotion of products to the development of experiences through partnerships. Integral to this shift was providing more training/business support for operators to improve their understanding of global best practices and trends.
- On the demand side all destinations used a research-based approach and looked at source market origins to align the interests and needs of visitors with supply. On the supply side, many destinations applied some form of a 'lead with signature experiences' model as the overarching focus for developing product strategy.
- An example from Ireland was the use of the Brand Ireland identity to formulate key experience pillars based on the interests of targeted consumer segments. Core propositions ('"brand architecture") were then created for each regional destination to support the overarching brand identity. This process helped to guide more strategic product development and investments.

Product development best-practice tactics: Common Themes

- The common themes for product development actions and initiatives related to the following areas:
  - Tourism Market Readiness education, support and training for businesses and entrepreneurs
  - Operator access to and utilization of research and data to adapt to changing market demands and facilitate better positioning
  - Product quality assessment systems to meet visitor expectations, including perceptions of value for money
  - Identification of high-potential areas for new tourism development and enhancement of existing assets
  - Funds and support for upgraded and enhanced key demand generators
  - Assessment of surrounding infrastructure to enable easier access to assets

	Priority Product Identification (Demand Analysis)	Signature Experiences	Regional Collaboration	Better Access to Research	Professional Development	Creation of fund/investment environment	Product Quality Assessment	Market Readiness Education
Ireland	✓	✓	✓	✓	✓	✓	✓	✓
Scotland	✓		✓	✓		✓	✓	
Newfoundland and Labrador	✓		✓	✓	✓		✓	✓
Alberta	✓	✓	✓	✓	✓	✓	✓	✓
Northeastern Ontario	✓	✓	✓		✓	✓	✓	✓
Indigenous Tourism	✓		✓	✓	✓	✓	✓	✓

Section 3

- Regional strengths
- Tourism experiences by product themes and categories
- Distribution of products (GIS mapping)
- Key skills available in RTO9 and those needed to meet customer demands and market/export readiness

Regional Strengths

To draw visitors across the region, it is essential that the sub-regions within South Eastern Ontario build on their high-potential products and experiences.

Destination	High Potential Category	Rationale
Bay of Quinte	Outdoor Adventure Entertainment, Culture & Heritage Business Tourism	There is an opportunity for Bay of Quinte to build on its natural assets as a gateway to the destination's Outdoor Adventure products and experiences, and to better link the DMO regions through nature.
Prince Edward County	Food & Drink Outdoor Adventure	There is growing brand recognition and awareness of Prince Edward County as a agriculture, food & drink destination, however, it may still be overlooked as Toronto and Niagara are well established in these areas. There are gaps in winter offerings but this has been improving.
Land O'Lakes	Outdoor Adventure	Opportunities exist for Land O'Lakes to further develop built asset and programmed assets to support natural experiences. For example, Lennox & Addington Dark Sky Viewing Area stands out as a unique experience but nearby offerings are challenging to find.
Rideau Heritage Route	Outdoor Adventure Entertainment, Culture & Heritage	Rideau Heritage Route is a key Outdoor Adventure region with plenty of Culture & Heritage however the key is to link it with other DMO regions.
Kingston	Entertainment, Culture & Heritage Food & Drink Outdoor Adventure	Kingston's public and private sector has made significant investments into dynamic and inspiring facilities to support Entertainment, Culture & Heritage products and experiences. However, some assets may be underperforming due to lack of awareness.

Regional Strengths, cont'd.

As destinations like Brockville and Cornwall and The Counties become more well known, pan-regional travel will become more appealing.

Destination	High Potential Category	Rationale
1000 Islands Gananoque	Outdoor Adventure Entertainment, Culture & Heritage	With iconic products and experiences, 1000 Islands Gananoque can be a magnet for soft Outdoor Adventure enthusiasts. For example those looking to be in touch with nature but not necessarily the physically challenging activities.
1000 Islands Brockville	Outdoor Adventure Entertainment, Culture & Heritage Festivals, Events & Sport Tourism	1000 Islands Brockville is developing a reputation for festivals and events and due to its proximity to the St. Lawrence River, there is a unique focus on natural assets.
Cornwall and The Counties	Business Tourism Sport Tourism	With close proximity to the Ottawa International Airport, Cornwall and The Counties is uniquely positioned to support a world-class business and sport tourism market. For example the Benson Centre, Civic Complex and NAV CENTRE are versatile facilities for tournaments, events and meetings/conventions.

Tourism Experiences and Resources

Visitors want to immerse themselves in highly engaging experiences.

Visitors come from near and far to explore the unique, the exotic, and the unexpected. As Destination Canada have observed: "Travellers want more out of life and their time away. The days where visitors simply "stop and see" are all but over. Now, visitors want to immerse themselves in highly engaging experiences. Simply put, visitors are seeking Experiential Travel". "Experiential travel engages visitors in a series of memorable travel activities that are inherently personal. It involves all senses, and makes connections on a physical, emotional, spiritual, social or intellectual level. It is travel designed to engage visitors with the locals, set the stage for conversations, tap the senses and celebrate what is unique". To compete in today's fierce tourism industry, destinations must focus on providing memorable experiences rather than simply selling products.

A tourism experience happens at the intersection of local people, local culture, and local geography. Whether its peak season or shoulder season, tourism experiences are based on the destination's tourism resources / assets. Before the tourism future for the region can be determined, it is essential to first take stock of the visitor experiences available in the region and the resources on which those experiences are based.

Tourism resources are the natural assets, built assets and programmed assets that facilitate visitor experiences. Tourism resources are the foundation and competitive advantage on which the industry is sustained and on which it can be further enhanced.

"A tourism product is what you buy, an experience is what you remember"

Destination Canada

Tourism Experiences and Resources, cont'd.

South Eastern Ontario offers an incredible diversity of visitor experiences.

Whether it be taking a cruise, boating or paddling on the St. Lawrence River amongst the 1000 Islands, exploring Fort Henry National Historic Site or Upper Canada Village, scuba diving on sunken wrecks, camping at one of the region's many parks, cycling or hiking the Great Lakes Waterfront Trail, snowmobiling, ice fishing, zip-lining through tree top canopies, sipping beer at a local micro brewery, viewing and learning about the locks along the Rideau Canal World Heritage Site, meandering through quaint and welcoming historic villages, spending a week or two at a cottage or cabin, checking out a local sugar shack, family farm or farmers market, picking apples at a local orchard, enjoying the nightlife of a waterfront urban city, indulging at a local spa, or visiting a museum or the aquarium, there is an experience available for everyone.

The abundance of sporting facilities also supports a wide array of local and regional sport tourism events while the larger urban centers are equipped to support the business and academic community with hosting a variety of small to medium sized business conferences and events.

Experience Themes

For the purposes of planning and understanding the current mix of visitor experiences, experiences available in the region have been organized into six themes.

Outdoor Adventure

Agriculture, Food & Drink

Entertainment, Culture & Heritage

Festivals, Events & Sports Tourism

Wellness

Business Events

Experience Themes, cont'd.

The region's many outdoor adventure assets serve as both primary and secondary motivators for visiting the region.

Outdoor Adventure	Agriculture, Food & Drink (Culinary)	Entertainment, Culture & Heritage
Visiting National, Provincial & Municipal Parks and Protected Areas Scenic Strolls Day & multi-day power boating & sailing Day & multi-day kayaking & canoeing Swimming & beach going Scuba diving & sunken wreck exploration Hiking, Walking and Cycling Trails Exploring the 1000 Islands River cruises Cross country skiing ATV & snowmobiling excursions Helicopter tours & sky diving Guided / un-guided fishing & ice fishing Wildlife viewing, nature centers & interpretation Motorsports & Motorcycle routes	U-pick orchards Maple sugar bushes / farms Vineyards and Breweries Farmers markets Farm tours Food festivals	Visiting World Heritage, National & Provincial Historic Sites City life & night life Art galleries Performing arts & playhouses Museums and old towns & sites Concerts Murals tours

Experience Themes, cont’d.

The region hosts an array of small to large annual festivals and events, whose numbers have been increasing each year.

Festivals, Events & Sport Tourism	Wellness	Business Events
Sport tournaments & competitions Boating & sailing festivals Music festivals Seasonal fairs, festivals & markets Food festivals	Retreats & Resorts Spas & Relaxation Centres	Conferences & conventions Tradeshows & exhibitions Incentives, getaways & teambuilding

Tourism Resources and Assets

There are at least 568 tourism assets of varying types in the region.

An inventory of the region's tourism assets was undertaken using data and information from local DMO's, internet searches and local knowledge. Without considering accommodations, restaurants and retail, there are at least 568 tourism assets of varying types in the region.

As can be seen in the following map, these assets are well distributed throughout the region though some DMO regions have a higher density of assets than others. The following sections summarize the supply of tourism assets by visitor experience theme.

Tourism Assets by DMO

70 – Bay of Quinte
79 – Brockville 1000 Islands
77 – Cornwall & the Counties
46 – Gananoque 1000 Islands
127 – Kingston
23 – Land O' Lakes
100 – Prince Edward County
34 – Rideau Heritage Route

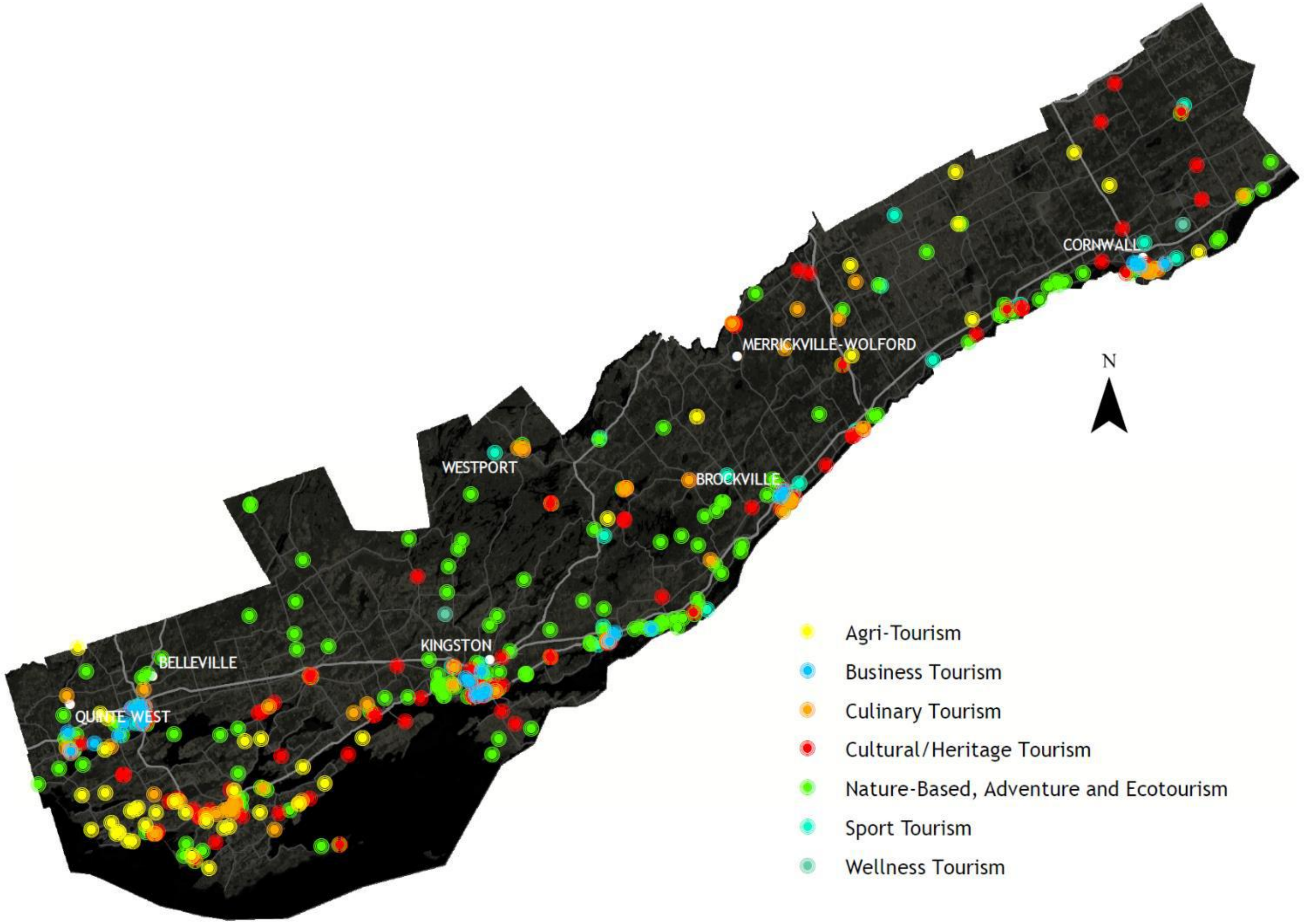


Figure 1 Distribution of Tourism Assets by Experience Theme

Outdoor Adventure

The region contains at least 199 different outdoor adventure tourism assets.

The region contains at least 199 different outdoor adventure tourism assets. There are more outdoor adventure tourism assets in the region than any other visitor experience theme. Parks, Frontenac Arch Biosphere Reserve, fish and wildlife, marinas, campgrounds, trails, cruises, beaches, ziplines, sunken wrecks, outdoor splash pads and spray parks, outdoor equipment rentals, fishing tours are just some of the outdoor adventure assets available to visitors.

As illustrated in the following map, outdoor adventure tourism assets are distributed throughout much of the region. The greatest concentration of outdoor adventure tourism assets is clustered along the St Lawrence River corridor between Kingston, Gananoque and Brockville. In fact, this portion of the region comprises nearly 60% of the identified outdoor adventure assets in the region.

Key Highlights

- 100s of kilometers of trails
- 1 National Park
- 11 Provincial Parks
- 100s of municipal parks
- 45 different activities
- 12 attractions
- 15 events
- 29 marinas
- 14 tours / cruises

Figure 2 Distribution of Outdoor Adventure Assets

Adventure tourism, valued at $263 billion, is one of the fastest-growing sectors of tourism that attracts high value customers, supports local economies and encourages sustainable practices.

(World Tourism Organization)

Outdoor Adventure

The region contains at least 199 different outdoor adventure tourism assets.

A relatively high density of parks, campgrounds, trails, marinas and outdoor activities occur throughout the corridor. Other obvious clusters occur in portions of the Bay of Quinte, Rideau Heritage Route and Cornwall and the Counties.

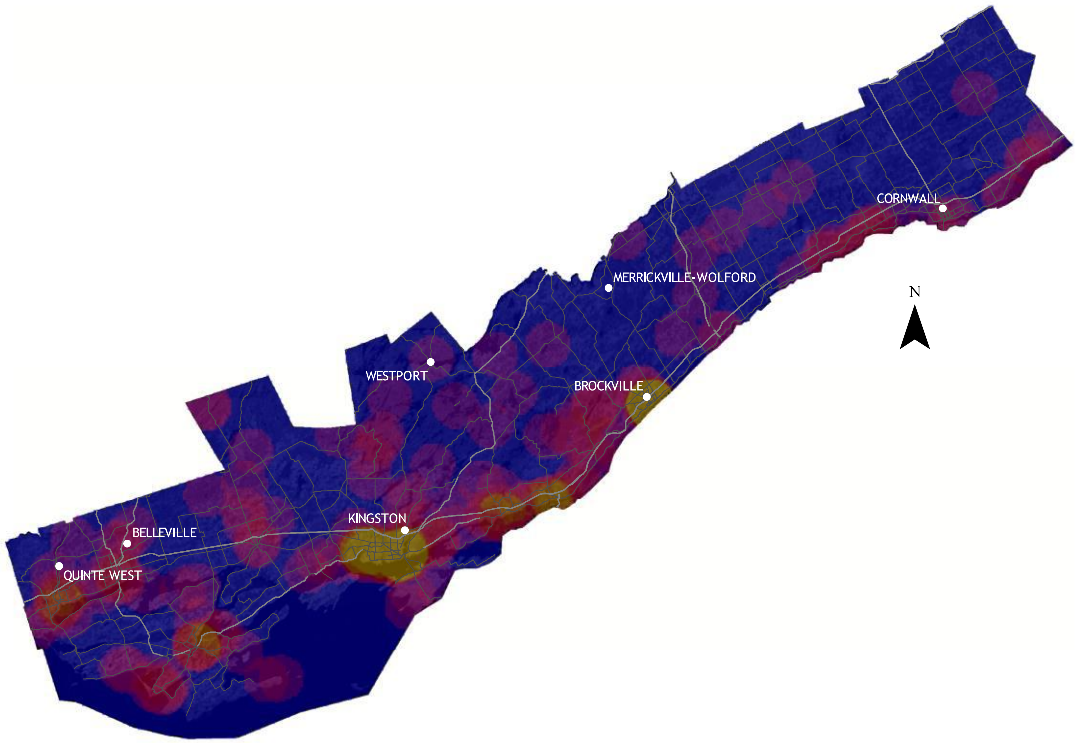


Figure 3 Density of Outdoor Adventure Assets

Figure 4 National & Provincial Parks & Protected Areas

Outdoor Adventure

There are few trails that are known to be "signature trails" capable of serving as a primary travel motivator to the region.

According to Trails Ontario, the region boasts over 162 diverse on and off-road, front country and backcountry trails totalling over 1000 kilometers in length. In addition, the region contains 100s of kilometers of water routes which also serve as water trails for power boating and paddling. Visitors have the opportunity to walk, hike, run, cycle, horseback ride, power boat, paddle, mountain bike, ATV, cross-country ski, snowshoe and snowmobile throughout the region.

While some land and water trails have formalized staging areas and visitor infrastructure, many do not. The current supply of trails provides excellent local recreational opportunities and, from a tourism perspective, serve as secondary activities for visitors who are motivated to come to the region for other reasons (e.g. visiting friends and family, business etc.).

With the exception of the Great Lakes Waterfront Trail, there are few trails that are known to be "signature trails" capable of serving as a primary travel motivator to the region. However, given the impressive supply of trails throughout the region, there is a clear potential to expand and diversify the network of signature trails such that a broader array of travellers will be motivated to experience the region by trail.

Signature Trail

A trail experience that is of such quality it is capable of motivating travel to the region by target markets.

Outdoor Adventure

Distribution of Trails in the Region - Ontario Trails

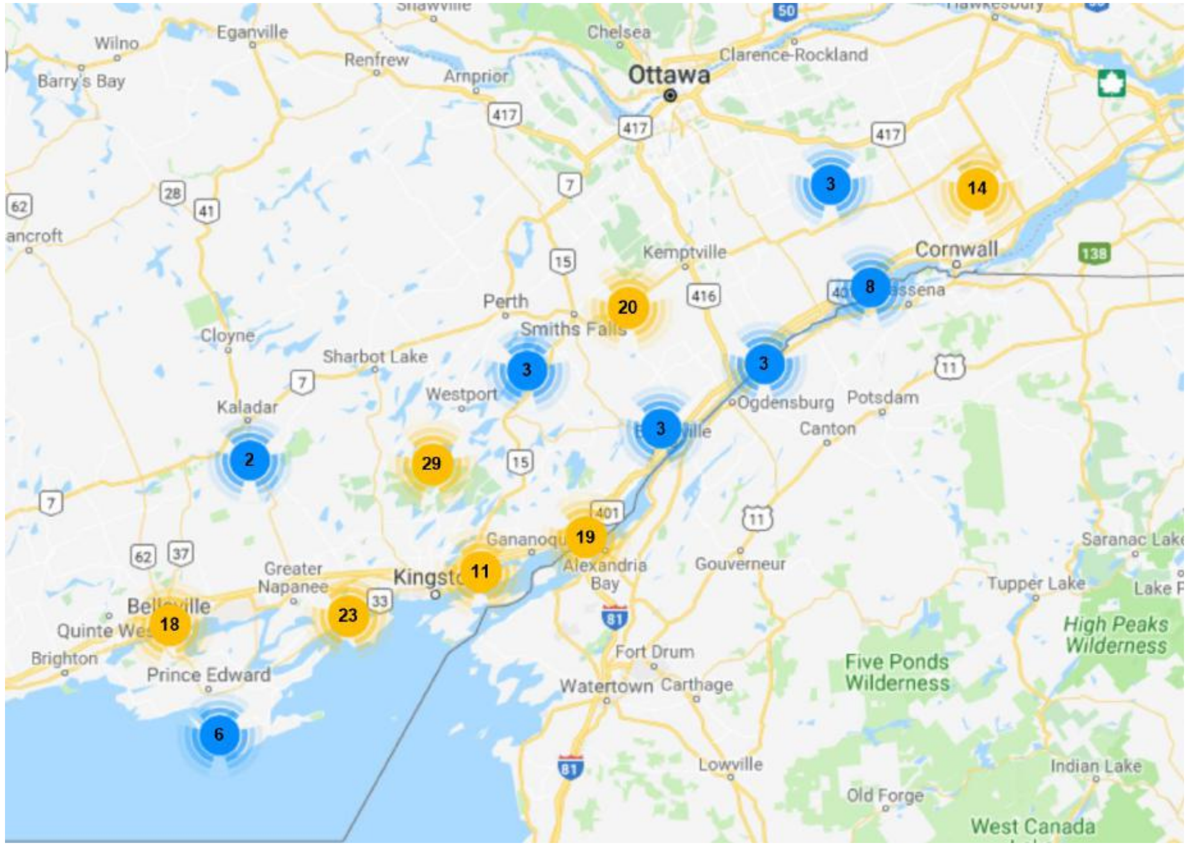
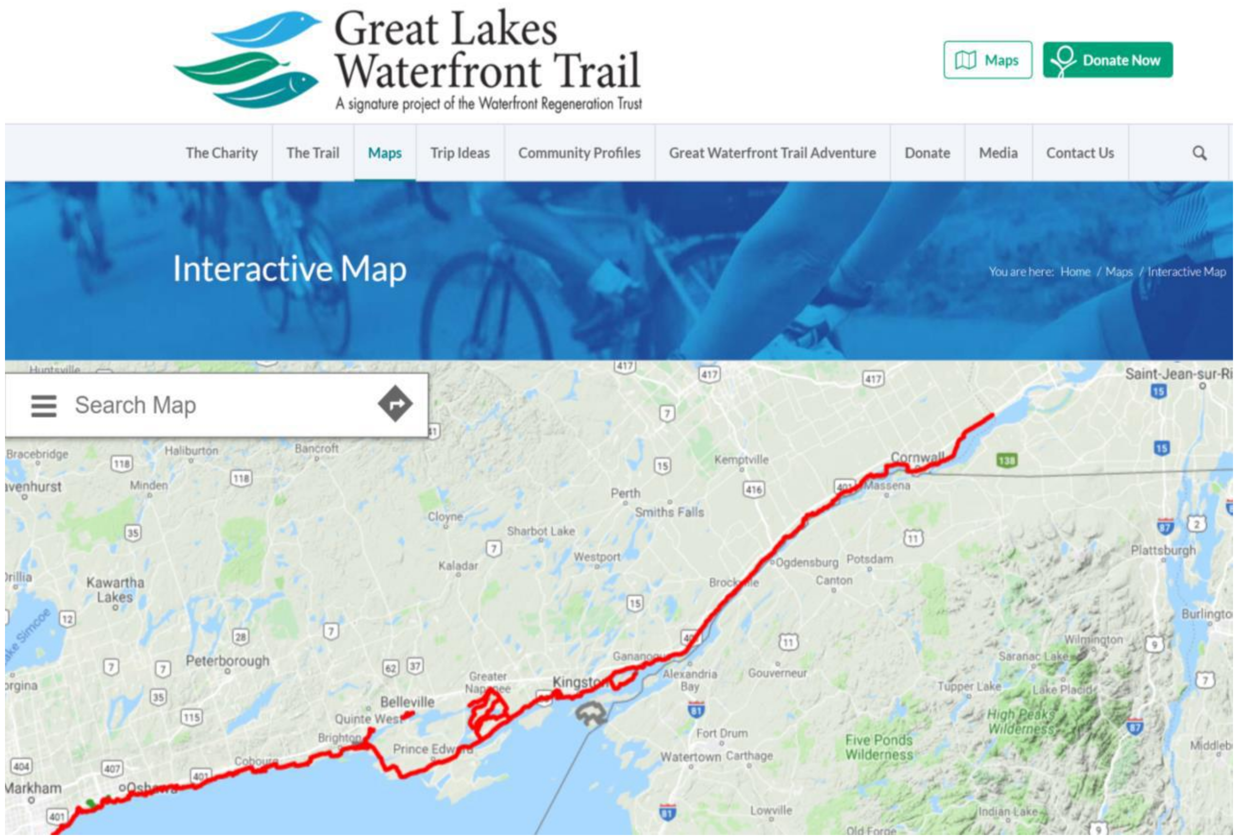


Figure 5 Distribution of Trails in the Region - Ontario Trails



Agriculture, Food & Drink (Culinary)

With at least 107 assets, there is an abundance of agri-tourism and culinary experiences available to visitors.

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The favourable landscape and climate have allowed family farms, orchards, maple farms, botanical gardens, locally sourced breweries, farmers markets, and specialty food vendors to thrive in the region. With at least 107 assets (43 agri-tourism and 64 culinary), there is an abundance of agri-tourism and culinary experiences available to visitors. These resources are scattered across the region, but not uniformly. For example, 63% of the identified agri-tourism assets are concentrated in Prince Edward County.

Of the 43 identified agri-tourism assets, 32 were farms delivering visitor experiences–including Furnace Falls Farm Retreat, Blue Gypsy Wines, Cannamore Orchards, and Sand Road Sugar Camp to name a few. The agricultural industry in the south west portion of the region has clearly realized the opportunity to celebrate and share its agricultural history and lifestyle with visitors. Events such as the Lyndhurst Turkey Fair or Delta Maple Syrup Festival are other prominent agri-tourism features that provide a venue for visitors and the host communities to learn more about the importance of agriculture in the region and to diversify their revenue streams.

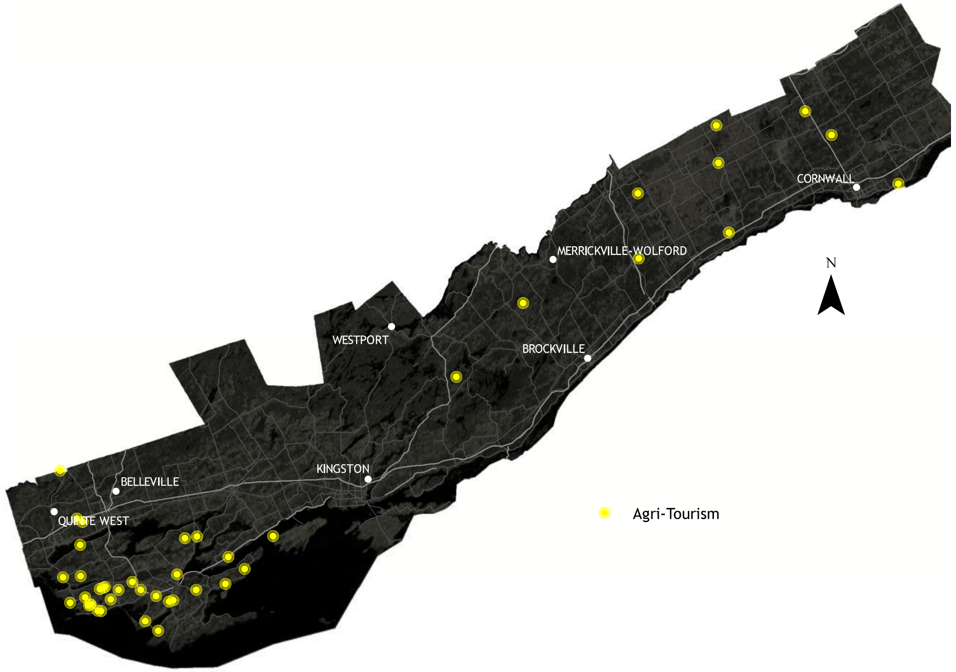

Figure 6 Distribution of Agri-Tourism Assets

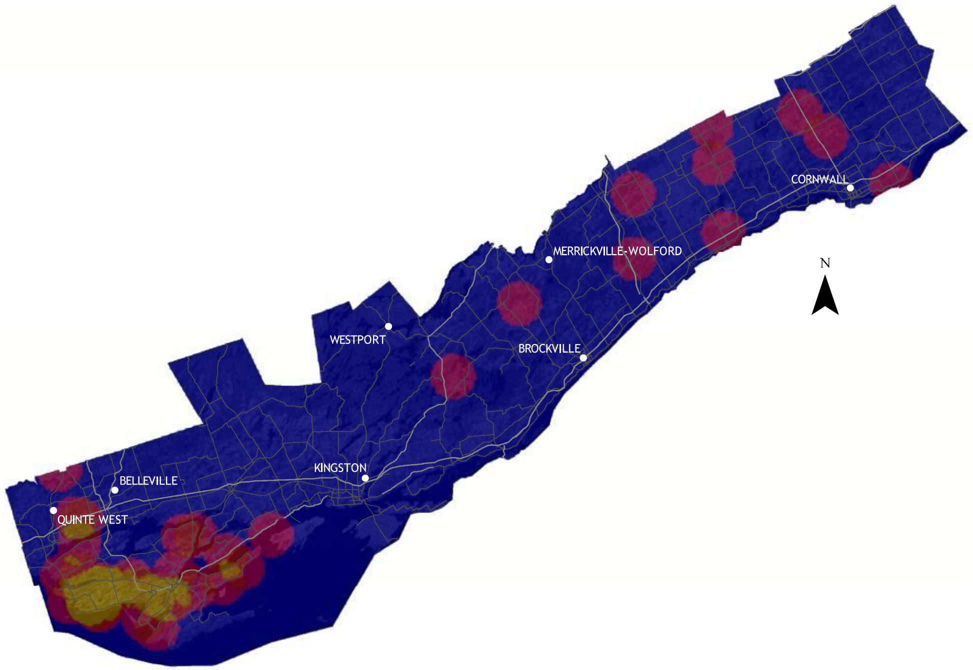

Figure 7 Density of Agri-Tourism Assets

Agriculture, Food & Drink (Culinary)

There are at least 64 different Food and Drink assets in the region.

Vineyards, markets and specialty food shops are powerful Food & Drink tourism attractions for short-haul markets. There are at least 64 different Food and Drink assets in the region. Though more uniformly distributed, slightly higher densities of these assets occur in Prince Edward County and Brockville. Community markets such as the Belleville Farmers Market can bring in visitors from around Ontario who want to take advantage of the bounty that the region has to offer. Visitors are also attracted to local breweries that offer tours and sampling like the Gananoque Brewing Company, which allows guests to get a real feel for what a locally sourced brewery has to offer.

Key Highlights

- 33 farms operating agri/ culinary tourism experiences
- 14 maple sugar experiences
- 47 Vineyards, Distilleries and Breweries offering tours
- Many festivals and markets

Figure 8 Distribution of Culinary Assets

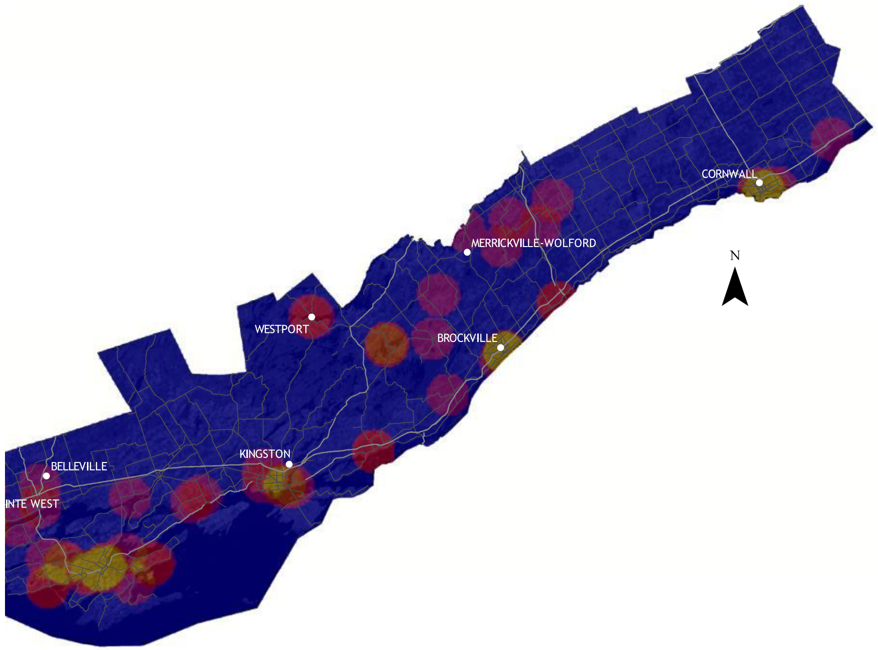

Figure 9 Density of Culinary Assets

Entertainment, Culture & Heritage Assets

The region is rich in Canadian history with many fascinating stories to share.

The region is rich in Canadian history with many fascinating stories to share. From the World Heritage Site and National and Provincial Historic Sites to museums, interpretive centers, performing art theatres, concert halls, murals, art studios, artisan workshops, historical villages, and iconic historical features, the region is powerfully positioned to support and further strengthen its entertainment, culture & heritage visitor experiences.

Some of the more well-known entertainment, culture & heritage assets in the region include the Rideau Canal World Heritage Site, Upper Canada Village, the Grand Theatre in Kingston, Fulford Place, and Fort Henry. Visitors can also enjoy the many art galleries that feature local talent, take in the theatre at any of the region's many playhouses and Arts Centres, or step into the past at one of the historical villages. Each asset is unique and allows visitors to experience some of history and culture of the region.

Key Highlights

- 1 UNESCO World Heritage Site
- 6 National Historic Sites
- 90 + Attractions
- 46 + Events
- Many performing Arts Venues
- Visual Art Studios

Entertainment, Culture & Heritage Assets, cont'd.

There are at least 185 different Entertainment, Culture and Heritage assets spread throughout the region.

There are at least 185 different Entertainment, Culture and Heritage assets spread throughout the region. There are higher concentrations of assets along the St Lawrence River and shorelines of Lake Ontario (Prince Edward County, Kingston and Brockville 1000 Islands).

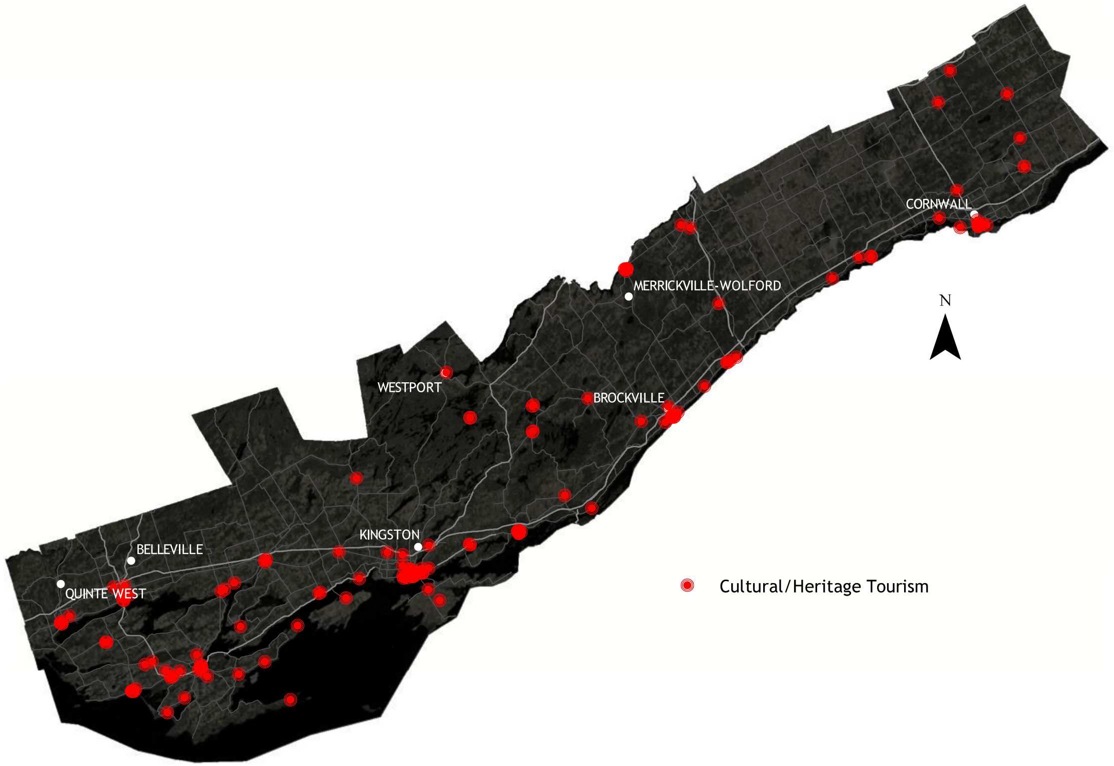

Figure 10 Distribution of Cultural & Heritage Assets

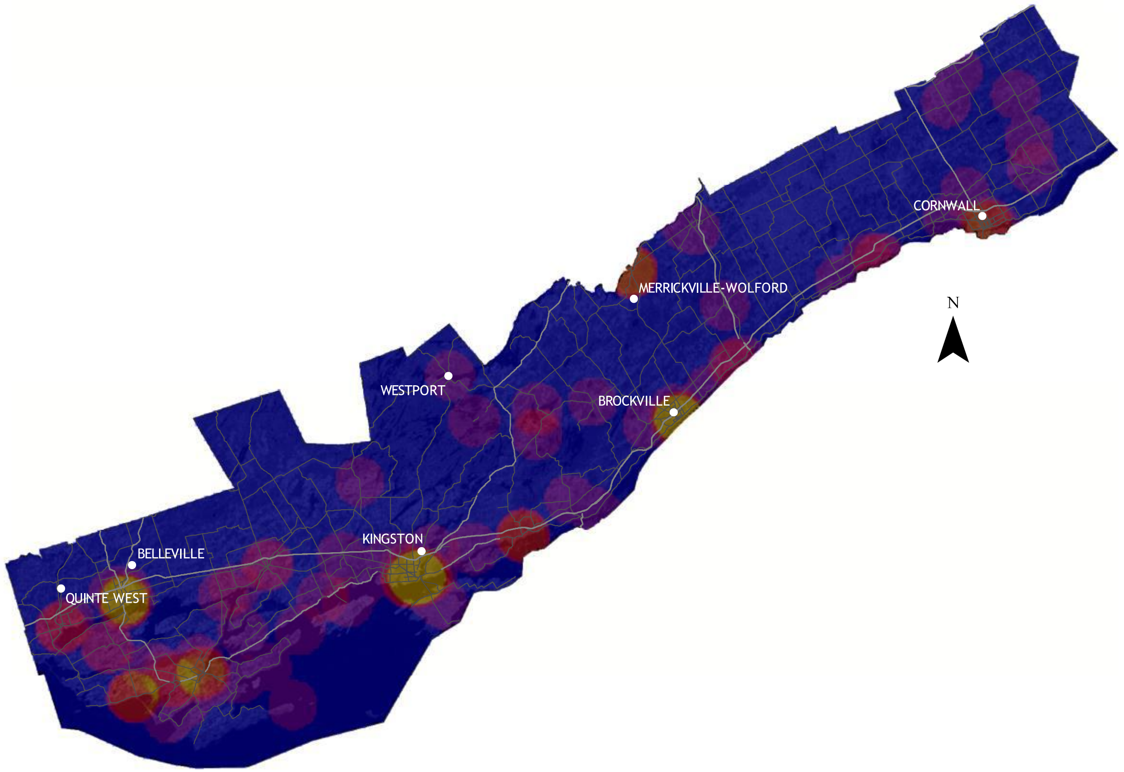

Figure 11 Density of Cultural & Heritage Assets

Festivals, Events and Sport Assets

There are at least 41 major sporting venues in the region that currently host or promote the hosting of sport tourism events.

Festivals, events, and sport tourism bring many benefits to local communities in the region. The region hosts an array of small to large annual festivals and events such as Ribfest, multicultural festivals, carnivals, Poker Runs and the Feb Fest as well as larger one-off events such as major concerts, tournaments and competitions. The region's festival and event line up regularly attracts visitors to the region from near and far.

There are at least 41 major sporting venues in the region that currently host or promote the hosting of sport tourism events. In addition, though not inventoried, there are hundreds of smaller sporting venues (facilities, fields, diamonds) that play a supporting role in sport tourism. Beautiful golf courses, state of the art sporting facilities such as large and small capacity arenas, aquatic centres, gymnasiums, natural and artificial turf fields, Speedways, curling rinks, sailing venues, recreation centres and many well-known sports teams support the region's sports tourism sector. Collectively, the region's assets routinely attract local, regional, provincial and national sporting events and competitions.

Kingston is ranked in the top 10 Sport Cities in Canada, the Top 7 National Sports Host Cities and the freshwater sailing capital of the world. In addition, Bay of Quinte and Cornwall and the Counties also market themselves as major sport tourism destinations. Though a detailed count of all sport tourism facilities was not completed, Kingston, Bay of Quinte and Cornwall and The Counties contain the most significant and well-known supply of sport tourism facilities. Other areas of the region also contain sporting facilities which host smaller more local and regional events and competitions.

SPORTS TOURISM IS WORTH $15-20 MILLION ANNUALLY FOR THE BAY OF QUINTE REGION.

Festivals, Events and Sport Assets, cont'd.

Kingston, Bay of Quinte and Cornwall and The Counties contain the most significant and well-known supply of sport tourism facilities.

Figure 12 Distribution of Major Sport Tourism Assets

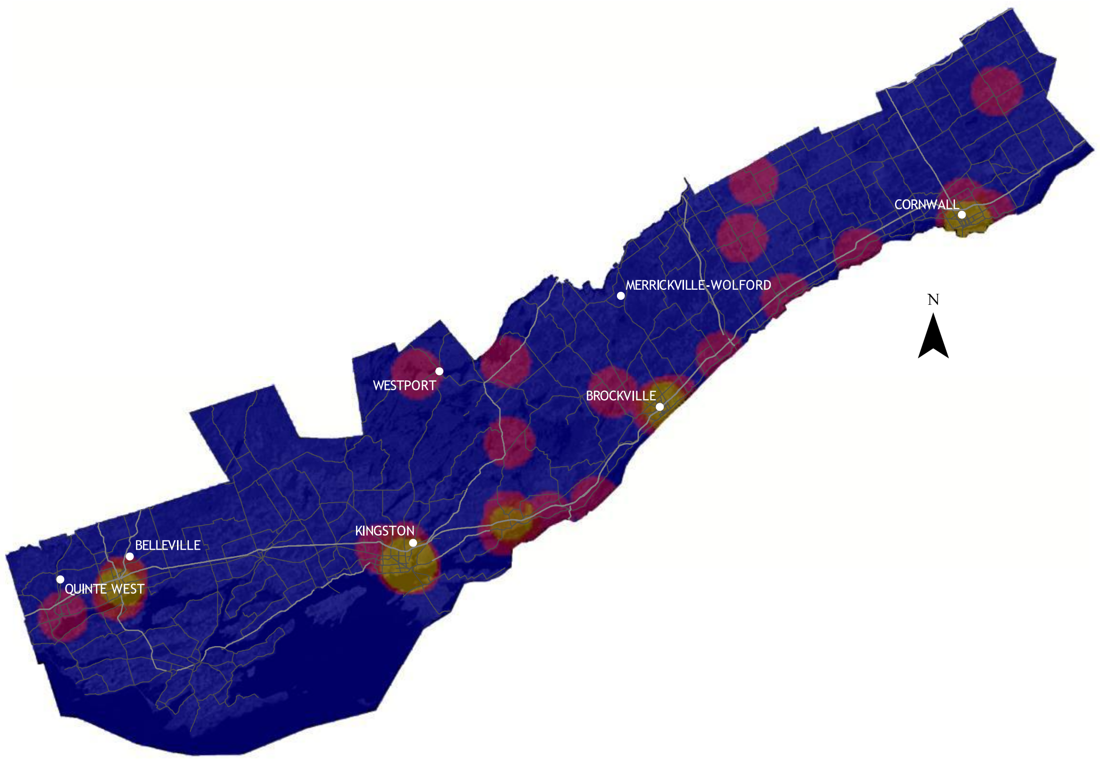

Figure 13 Density of Major Sport Tourism Assets

Business Tourism Assets

The region is home to at least 29 major facilities capable of hosting conferences, meetings, or events.

The region is home to at least 29 major facilities capable of hosting conferences, meetings, or events. For instance, the NAV Centre on the outskirts of Cornwall combines the technical sophistication of a modern learning centre with the comfort and amenities of a resort hotel.

There are also many hotels (not included in the inventory) and resort-style meeting facilities and banquet halls throughout the region that work well for team-building experiences, meetings and conferences. Business tourism assets are clustered in the major cities including Belleville, Kingston, Brockville, Cornwall and along the St. Lawrence River.

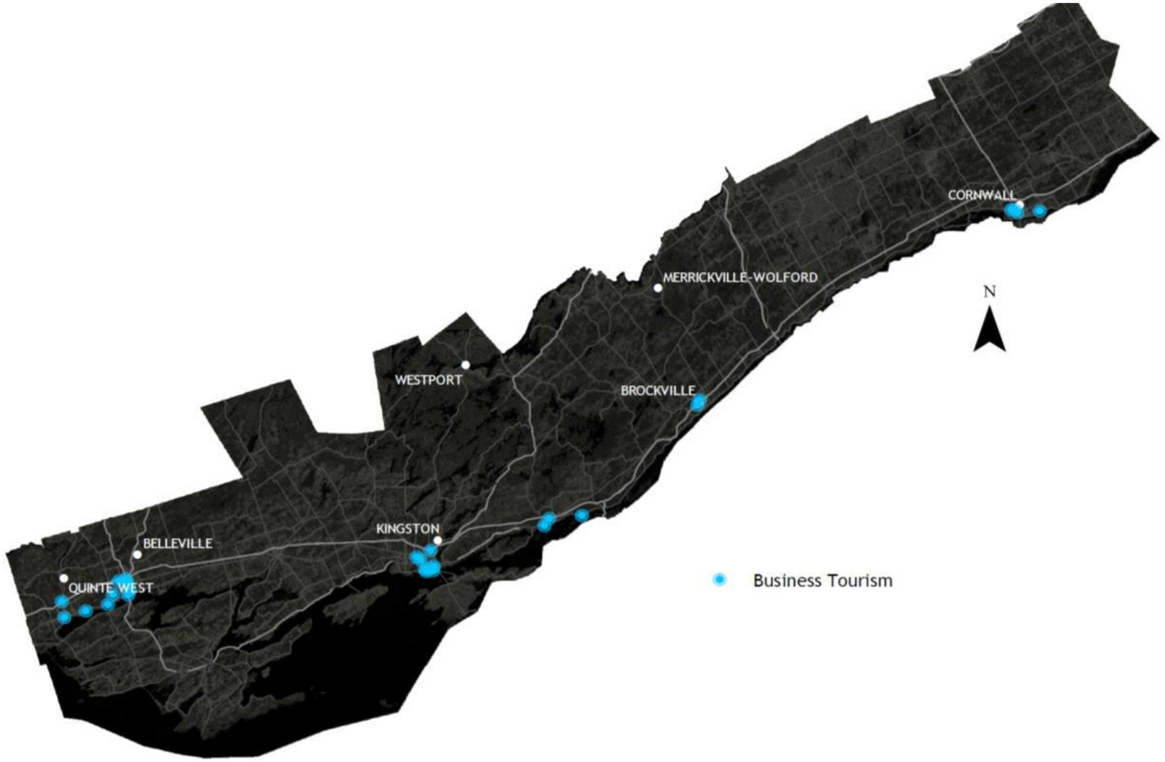

Figure 14 Distribution of Major Business Tourism Assets

Wellness Tourism

Wellness Tourism is a growing market, and the region's assets offer group packages focused on spa and wellness services.

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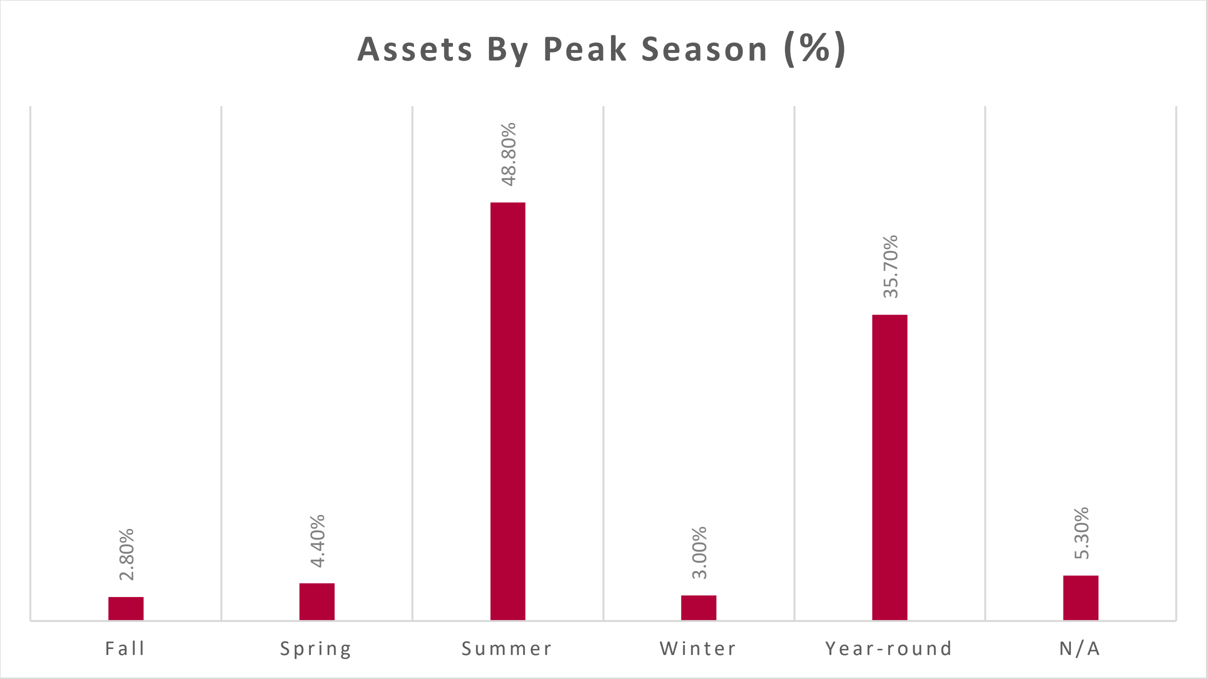
Recognizing that there are hundreds of smaller wellness and spa businesses which primarily serve local residents, only seven major wellness tourism assets were inventoried. These assets specifically offer group packages that are focused on spa and wellness services for short and long-haul visitors.

Figure 15 Distribution of Wellness Tourism Assets

Seasonality

Seasonality is a challenge for most tourism destinations and South Eastern Ontario is no exception.

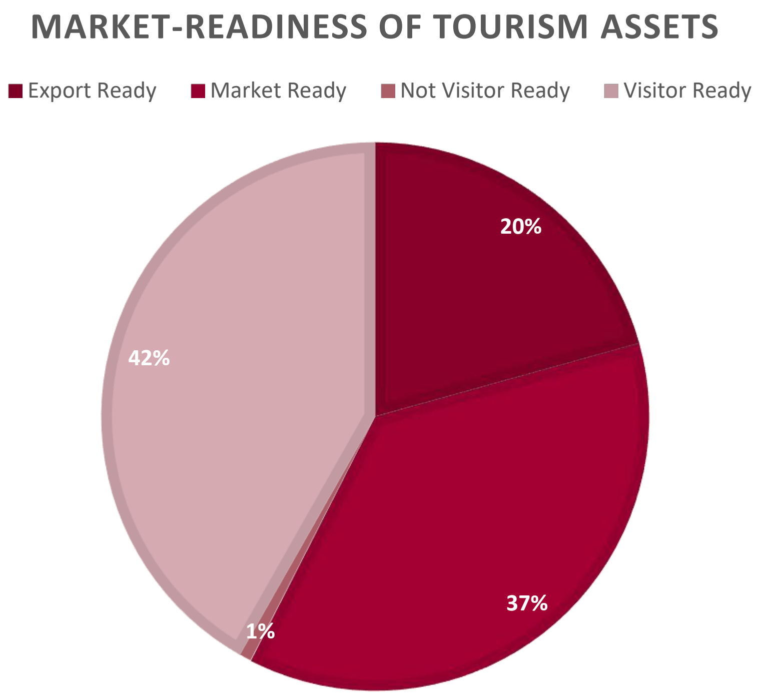
Seasonality is a challenge for most tourism destinations and South Eastern Ontario is no exception. The region's warm summers and snowy winters provide a foundation on which to deliver an excellent array of peak season and off-peak season experiences. To understand the current seasonality of the region's tourism industry, inventorying of the tourism assets in the region included an evaluation of each asset's operational periods and peak season where relevant. Analysis suggests that summer is the peak season for 48.8% of existing tourism assets in the region. The majority of these assets were associated with outdoor adventure experiences. In contrast, 3% of assets had a winter peak season. The majority of these assets were associated with winter festivals / events and snowmobiling. For 4.4% of assets, spring was identified as the peak season while fall was the peak season for 2.8% of assets. Analytics suggest that the region is relying on natural assets, festivals and events to help boost visitation in the off-seasons (Spring, Fall, Winter). Meanwhile, 35.7% of assets operated year-round with no obviously known peak season. Of those assets operating year-round, most were indoor-based facility assets.



Market Readiness

The analysis suggests that 41.2% of assets are visitor-ready, 36.3% are market-ready and that 20.4% are export-ready.

In addition to inventorying the supply and distribution of tourism assets in the region, the market readiness of assets was evaluated. Market-readiness is a high-level evaluation of the readiness of tourism assets to meet or exceed visitor expectations. General information available on asset websites were compared with Destination British Columbia's' Market Readiness Standards to provide a high-level evaluation of the market readiness of tourism assets in the region. The analysis suggests that 41.2% of assets are visitor-ready, 36.3% are market-ready and the 20.4% are export-ready. The results suggest that there is the opportunity to continue to enhance the market-readiness of the region's tourism assets and visitor experiences.



Access

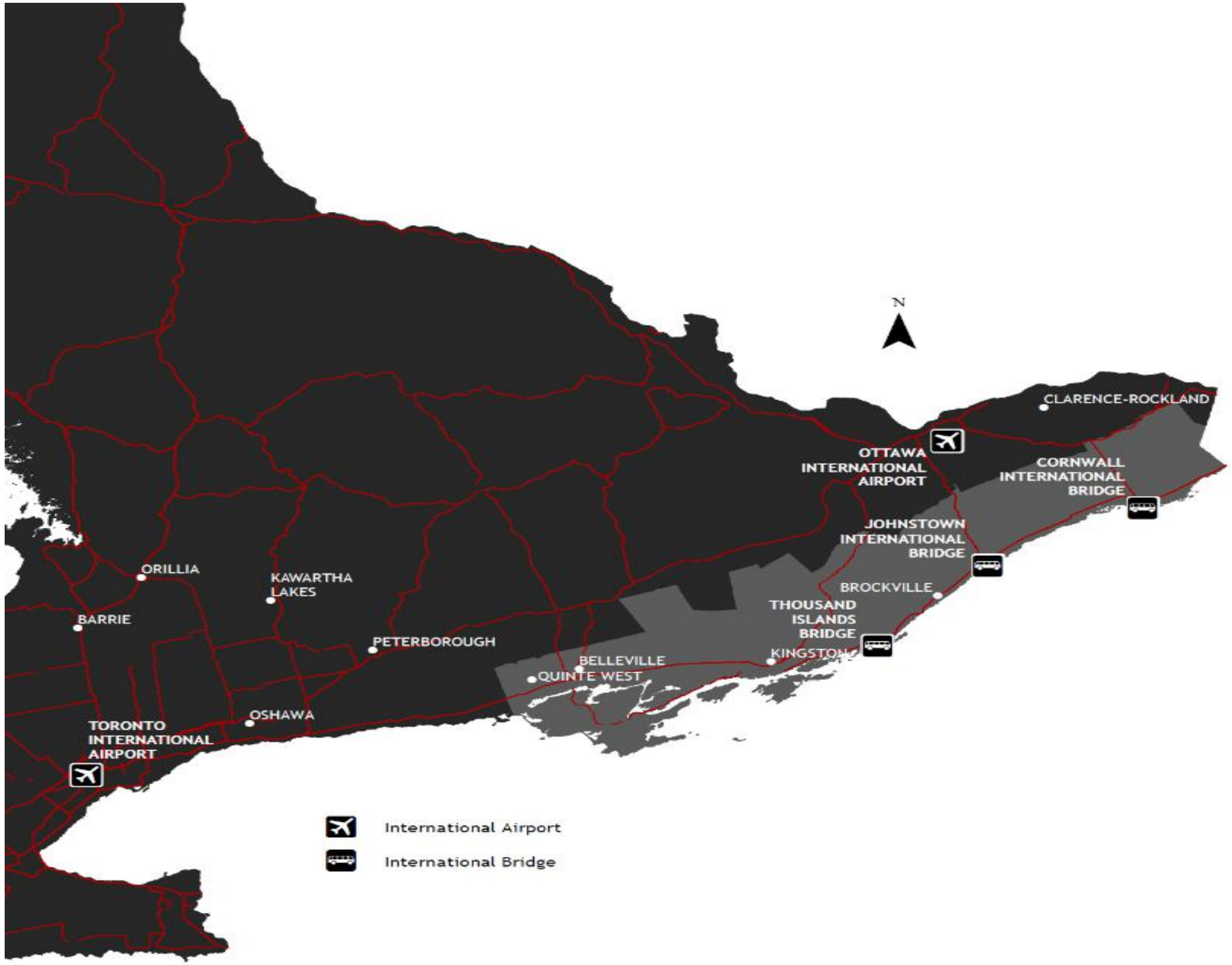
All 568 of the inventoried assets are within a 3-hour drive of the international airports and international bridges.

RTO 9 Regional Tourism ORGANIZATION

Access can serve as a major barrier to a destination's tourism success. The region is readily accessible via a network of major highways. Highway 401 serves as the major east-west point of access from adjacent regions and the United States, while highway 416 and other smaller highways (e.g. 29, 15, 38, 411, 37, 42) provide major north-south connections.

The region also contains three international bridges within the United States and is conveniently close to international airports in Toronto and Ottawa. With 75% of the province's population, or 10 million people, within a 3-hour drive, the region is easily accessible to a very large short-haul market.

Meanwhile, all 568 of the inventoried assets are within a 3-hour drive of the international airports and international bridges, suggesting the region is also accessible to mid- and long-haul markets.



Access, cont'd.

The region's assets are accessible to both mid- and long-haul markets.

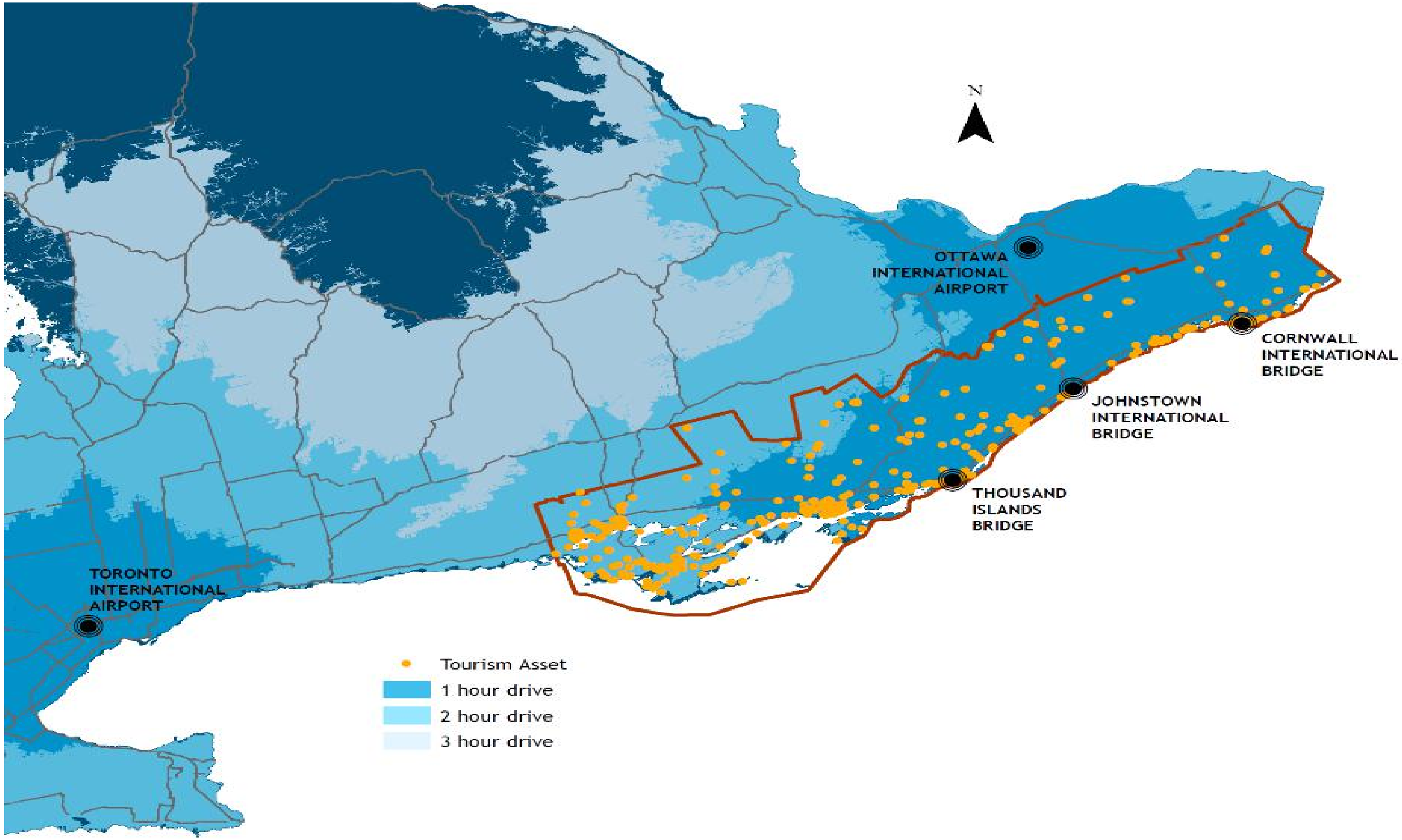
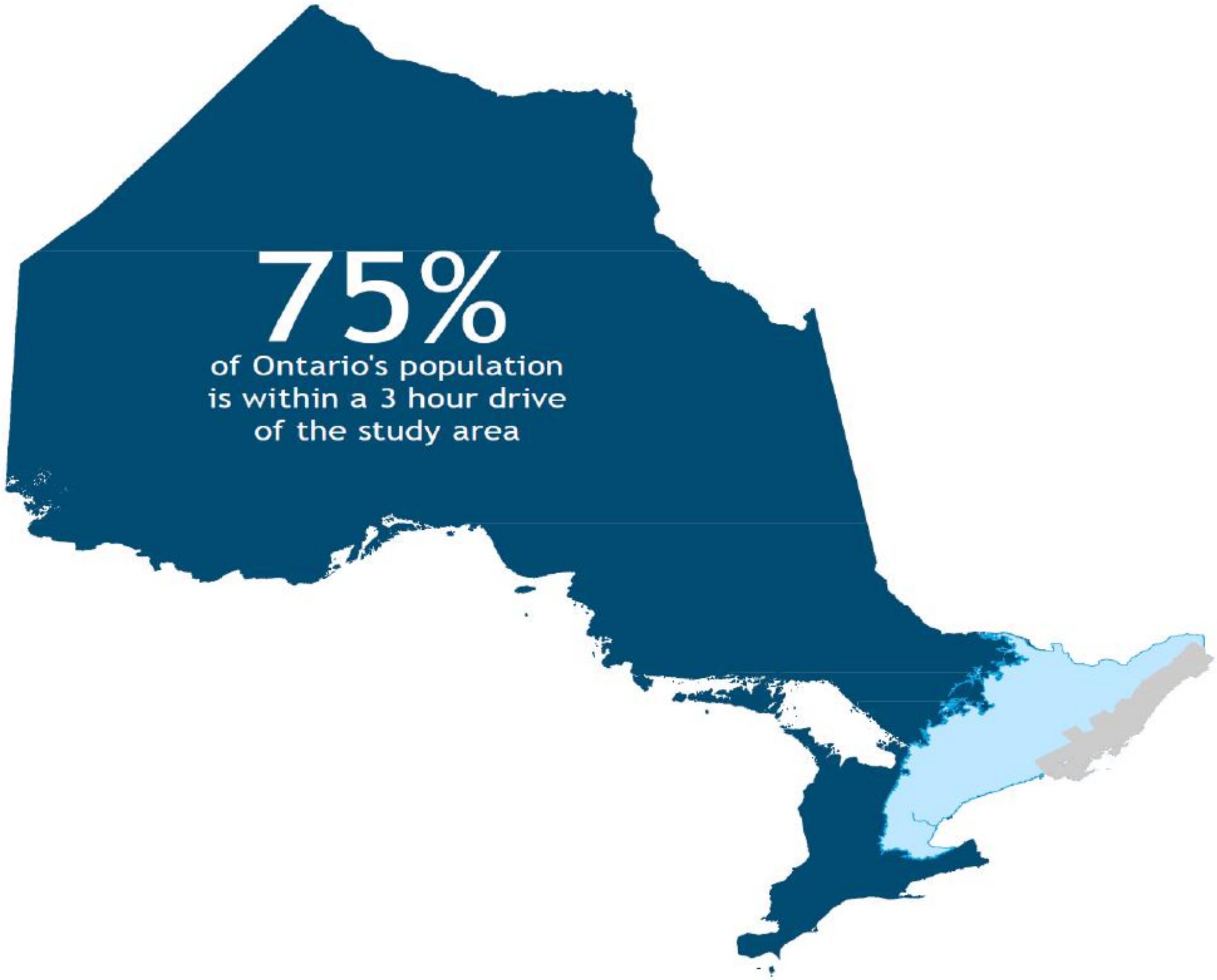


Figure 17 Drive Time Catchments for Major Points of Access

Access, cont'd.

With 75% of the province's population, or 10 million people, within a 3-hour drive, the region is easily accessible to a very large short-haul market.



Key Skills in RTO9

Retail jobs top the list of currently in demand tourism industry occupations.

In an increasingly competitive environment with sophisticated travellers, providing quality products and creating memorable experiences needs to be at the core for businesses and operators in the tourism industry. This can partly be achieved by tailoring products to meet the demand of key target segments and integrating product quality assessment systems (for businesses and destinations), but ensuring a well trained tourism workforce is essential for bringing South Eastern Ontario experiences to life. With the vast majority of South Eastern Ontario tourism jobs in the retail sector, staff need to not only be trained in the area of customer service but also understand the value and importance of tourism so they can fully appreciate their role and add value to the visitor economy.

Continuing to build capacity through training opportunities (online and in-person), sharing information about changing visitor expectations, learning about emerging technology, assessing comparable tourism destinations and understanding global trends can help to keep destinations and business on top of an evolving marketplace.

Section 4

Section 4

RTO9 has an obligation as the regional tourism organization to lead on a regional product development vision.

Recommended Structural Change

In conducting this analysis and developing the strategy, it is obvious RTO9's existing staffing structure lacks a point person and lead on product development. To ensure this analysis and strategy is put to good use, we are recommending RTO9 designate one senior staff person to have overall responsibility for product development and lead on the implementation of this strategy.

While the analysis indicated a number of RTOs with an identified staff person with an almost exclusive responsibility for product development (i.e., a Product Development Manager), RTO9's existing budget likely will not provide for this. As such, the recommendation would be to designate RTO9's Executive Director as the lead product development manager (i.e., included within existing managerial responsibilities).

For the purposes of product and experience development, the recommendation is for the Executive Director to lead on:

- Implementation of the six recommendations during 2019/2020 and beyond.
- Provide the required secondary analysis to develop the required itineraries and packages and coordinate the training using external resources if required.

Implementing this structural change will align RTO9 with peer RTOs in Ontario.

Section 4

RTO9 has an obligation as the regional tourism organization to lead on a regional product development vision.

RTO9 Regional Tourism ORGANIZATION

Recommended Product Development Implementation Steps

A total of six recommended implementation steps are outlined along four main goals. Examples and additional external resources have been provided to support RTO9's action. The recommendations have been developed within the context of RTO9's existing resources and budget limits. The below table outlines the priority and potential implementation timeframe for each recommendation – for RTO9's consideration.

	Priority	Timeline
1) RTO9 should develop a series of tourism itineraries and packages that encompass specific routes within the region to increase spend, length of stay and dispersal.	High Priority	2019/2020
2) RTO9 should further develop and boost the profile of the handful of signature trails in the region (e.g., Waterfront Trail) given trails are a key draw for visitors to experience nature and the region's key natural assets.	Medium Priority	2020/2021
3) RTO9 should move beyond products and services into the development and promotion of true tourism experiences.	High Priority	2019/2020
4) RTO9 should personify and grow the tourism experiences and attractions around the region's nature assets.	Medium Priority	2020/2021
5) Training and capacity building is needed to effectively scale, enhance and diversify the offerings of the myriad tourism operators within the region.	High Priority	2019/2020
6) RTO9 should will work collaboratively with their DMO partners, tourism industry, Parks Canada, residents and local governments to prepare and implement a Visitor Management Framework for the region – which will position RTO9 in a leadership position among RTOs in Ontario.	Lower Priority	2021/2022

Section 4, cont'd.

Key strategic recommendations identified as part of the analysis.

A) Goal - Development of itineraries, packages and trails to improve dispersal and length of stay within the region.

1) **RTO9 should develop a series of tourism itineraries and packages that encompass specific routes within the region to increase spend, length of stay and dispersal**. RTO9 should take the lead to develop these itineraries with a series of pilot packages associated with each. The itineraries should follow the six main RTO9 experience categories with a sample of seasonal (i.e., including winter) and Indigenous packages. The actual creation of the itineraries and packages can be developed in-house by RTO9's team in partnership with the DMOs. RTO12's US and UK Itinerary Development Project can be used as a model: http://rto12.ca/wp-content/uploads/2017/03/EE_US-and-UK-Itinerary-Project_Final-Report_2016.pdf

Implementation Steps:

a) Using the analysis in Section 3 of this report, RTO9 should identify a number of possible pan-regional itineraries themed by product category and season.

b) In partnership with DMOs, RTO9 should put together a series of ½ day to 3+ night packages linked to the itineraries incorporating select operators.

c) Once developed, RTO9 would solicit the feedback and receptivity for these operators to pilot these packages with travel consumers and/or travel trade.

d) RTO9 should champion a selection of Indigenous tourism itineraries and at least one package (as a pilot endeavour). The Indigenous Tourism Association of Canada's national guidelines and development funding support program can likely be utilized: https://indigenoustourism.ca/corporate/partnerships-development/

Section 4, cont'd.

Key strategic recommendations identified as part of the analysis.

Regional Tourism ORGANIZATION

2) RTO9 should further develop and boost the profile of the handful of signature trails in the region (e.g., Waterfront Trail) given trails are a key draw for visitors to experience nature and the region's key natural assets. The trails are presented to visitors by jurisdiction and not stitched together from a visitor perspective into long contiguous trail experiences (i.e., incorporating interpretation, rest facilities and paid attractions, accommodations and culinary and beverage experiences). We would recommend development of five or so motorized and non motorized land and water signature trails. And, the Waterfront trail needs to be enhanced and animated to provide a better visitor experience (i.e., RTO9 should develop a series of trail itineraries with connections to accommodations, transportation providers, equipment and guild providers). The US-based Rails-to-Trails Conservancy trails itinerary database can be used as a model: https://www.traillink.com/

Implementation Steps:

a) Using the analysis in Section 3 of this report, RTO9 should identify a number of possible pan-regional trail itineraries themed by motorized vs. non-motorized options.

b) Each itinerary should incorporate associated attractions, rest facilities and culinary and beverage options to further develop each trail as a full visitor experience.

c) The trail itineraries should then be promoted by RTO9 and linked DMOs to end consumers.

Section 4, cont'd.

Key strategic recommendations identified as part of the analysis.

B) Goal – Eventually shift product development to experience development to enhance the visitor experience and drive increased tourism yield in RTO9.

3) RTO9 should move beyond products and services into the development and promotion of true tourism experiences.

Using the asset inventory and working with their DMO partners, RTO9 should identify 10+ existing operators with a higher potential to evolve into signature experiences for the region. These should be balanced by sub-region and among the six main RTO9 experience categories. Destination Canada's Experience Toolkit can be used as a model for RTO9: https://www.destinationcanada.com/sites/default/files/2016-11/Programs_SignatureExperiences_Toolkit_Experiences_2011_EN.pdf

Implementation Steps:

a) Using Destination Canada's Export Ready Criteria, RTO9 should draft a set of guidelines for a RTO9 Signature Experiences Collection: https://www.destinationcanada.com/sites/default/files/2017-03/Programs_SignatureExperiences_ExportReadyCriteria_Mar2017_EN.pdf

b) Once the RTO9-specific criteria are ready, RTO9 should develop an application form and launch a call for Signature Experience submissions. Ideally RTO9 will develop a unique brand name for this submission programme.

c) In tandem, RTO9 can form an external group of judges to review and select the first batch of RTO9 Signature Experiences to be launched and promoted by RTO9 at a key event (e.g., AGM Summit).

Section 4, cont'd.

Key strategic recommendations identified as part of the analysis.

4) RTO9 should personify and grow the tourism experiences and attractions around the region's nature assets. Nature, or rather the accessible nature within the region is a key draw for visitors. RTO9 should seize the nature opportunities in places like: Bay of Quinte and Thousand Islands. This can be done by building on natural assets to strengthen outdoor adventure experiences and attractions. The asset inventory conducted as part of this analysis can be used to identify particular assets that could possibly be expanded to grow experiences and attractions. RTO9 would then have a list of possible development investment opportunities to provide to Economic Development officials from the associated municipalities.

The proposed Federal Government 2019/2020+ budget proposes $58.2 million over two years for regional development agencies to develop new tourism experiences. This funding which will fall under the banner of "the Canadian Experience Fund" will be used to grow five priority segments: 1. Indigenous tourism; 2. Rural and remote tourism; 3. Winter tourism; 4. Inclusiveness (primarily LGBTQ2+); 5. Culinary tourism

This funding envelope will be exclusively dedicated for use by the tourism industry, and will increase access to funding in regional development offices: https://tiac-aitc.ca/cgi/page.cgi/_zine.html/TopStories/Budget_2019_A_Sign_of_Progress_for_a_Whole_of_Government_Approach_to_Tourism

Once the framework for this Fund is developed and formally launched it could form the basis for a possible source of investment and capital to undertake this recommendation.

Section 4, cont'd.

Key strategic recommendations identified as part of the analysis.

Regional Tourism ORGANIZATION

4) RTO9 should personify and grow the tourism experiences and attractions around the region's nature assets – cont'd:

Implementation Steps:

a) RTO9 should take the lead on identifying natural assets within the region that could be sustainably developed to include attractions to enhance the overall experience.

b) Using a bespoke evaluation criteria developed by RTO9, each of the identified natural assets should be graded and ranked.

c) RTO9 should then champion the top 1 to 3 assets at the next Economic Developers Council of Ontario and the Ontario Ministry of Tourism, Culture and Sport, Tourism Investment "Meet in the Investor Dragons" event: https://edco.on.ca/event-2695336

d) Related to the above, RTO in partnership with their DMO partners should plan and host a Tourism Startup 'Ignite' Product Development Weekend. This forum would be designed to make connections, get advice and develop and pitch tourism product ideas to possible investors and DMO Economic Development officials. The Yarmouth and Acadian Shores Tourism Association and Ignite Labs' recent event can be used as a model: https://tourismns.ca/news-events/intouch-blog/ignite-tourism-startup-weekend-january-26-aims-spark-new-tourism

C) Goal – Build capacity of private sector and non-profit operators to deliver world-class tourism experiences via training and workshops.

5) Training and capacity building is needed to effectively scale, enhance and diversify the offerings of the myriad tourism operators within the region.
RTO9 should take the lead on hosting one or more Product Development and Experience Development workshops in partnership with their DMO partners to educate and train operators on improving Market Readiness. Destination BC's existing Market Readiness Training Program can be used as a model: https://www.destinationbc.ca/content/uploads/2018/08/Market_Ready_Standards.pdf. Additionally, the Atlantic Canada Travel Trade Readiness and Training program (developed by Twenty31 for the four Atlantic Canada provincial tourism departments) can be readily adapted for RTO9's use: https://tourismns.ca/travel-trade-toolkit

Implementation Steps:

a) RTO should review and tailor the above content into a ½ or 1-day workshop program and advertise this to operators willing to participate in the workshop and complete a follow-up training programme.

b) In partnership with DMO partners, RTO9 should host a Market and Trade Readiness workshop for a cross section of 10 to 20 operators. As a follow up exercise, each operator should be encouraged to complete the self-assessment check-list and training programme (i.e., the above mentioned tool-kit). RTO9 should then follow up with each operator and evaluate impact in becoming Market and Trade ready. Successful operators could then be promoted for RTO9's proposed Signature Experience programme.

Key strategic recommendations identified as part of the analysis.

D) Goal - Design and implementation a Visitor Management Framework to both enhance the visitor experience and ensure smart and sustainable growth within the RTO9 region.

6) RTO9 should will work collaboratively with their DMO partners, tourism industry, Parks Canada, residents and local governments to prepare and implement a Visitor Management Framework for the region – which will position RTO9 in a leadership position among RTOs in Ontario. Avoiding and mitigating the undesirable effects of the visitor economy is critical to the long-term success of the industry. In alignment with the UNWTO's 17 Sustainable Development Goals, RTO9 is committed to working with all players in the region to prepare a visitor management framework that allows the region to accurately understand, proactively plan for and devise strategies to address the potential unwanted effects of tourism. Visitor management is about more than setting a "total" number of people (carrying capacity) that can travel to the region or a destination within it. It is about truly understanding what impacts host communities are most concerned about, how those impacts occur, quantitatively and qualitatively understanding the impacts, setting limits of acceptable change and responding to changes in conditions with effective management strategies that appropriately target supply, demand, the tourism resource and the visitor.

Section 4, cont’d.

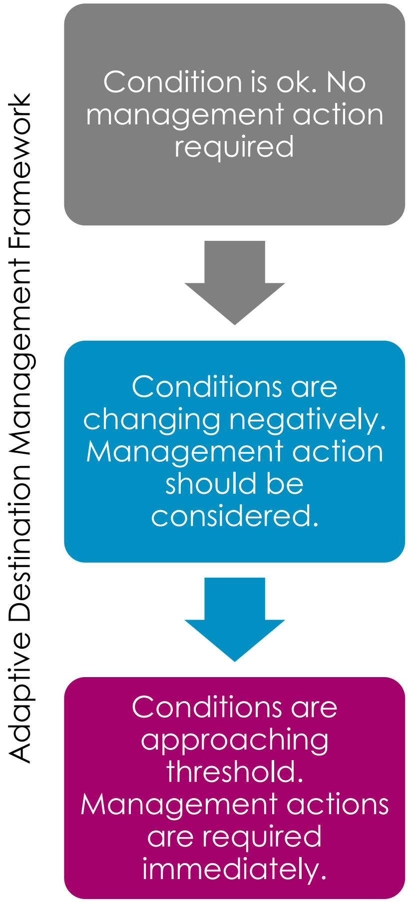
Key strategic recommendations identified as part of the analysis.

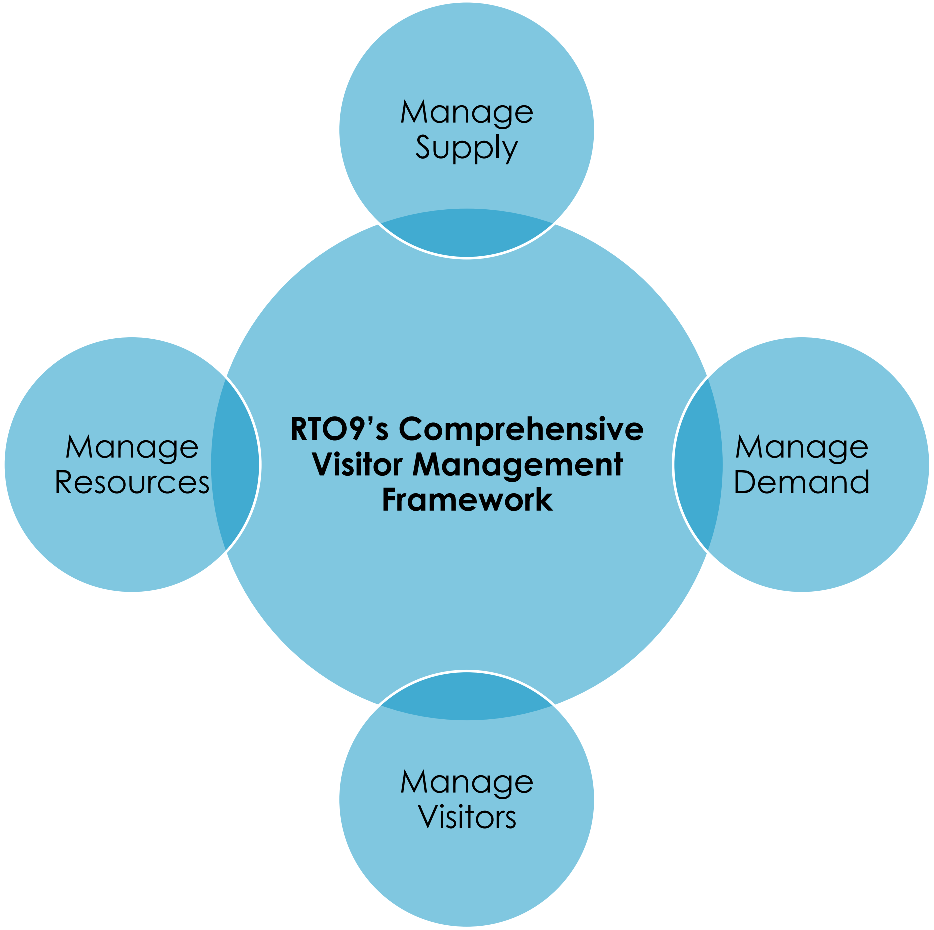
Implementation Steps:

- RTO9 should select an achievable number of SMART (specific, measurable, achievable, realistic, time-bound) indicators on which to monitor the most concerning tourism impacts in the region.
- RTO9 should quantify and qualify baseline conditions for each indicator.
- Through collaborative and participatory engagements with their DMO partners, RTO9 should set limits of acceptable change thresholds and targets for each indicator.
- RTO9 should identify triggers for each indicator to suggest when management actions should be applied to stop undesirable trends or the exceedance of an established threshold.
- RTO9 should then establish regular monitoring protocols, timeframes and accountabilities for each indicator.
- As determined by the performance of each indicator, RTO9 should identify an appropriate suite of actions that will be taken to address the impacts and maintain conditions within the limits of acceptable change. Management actions will comprehensively consider:
    - Management of the supply; Management of the demand; Management of the tourism resource; Management of the visitor and visitor patterns
- RTO9 should establish a “State of the Destination” reporting schedule and template and communication / education strategy to ensure communities understand the status of the destination.

Section 4, cont'd.

Key strategic recommendations identified as part of the analysis.





Appendix

- Best-practice case studies

Case Study 1: Failte Ireland National Tourism Development Authority

Overview

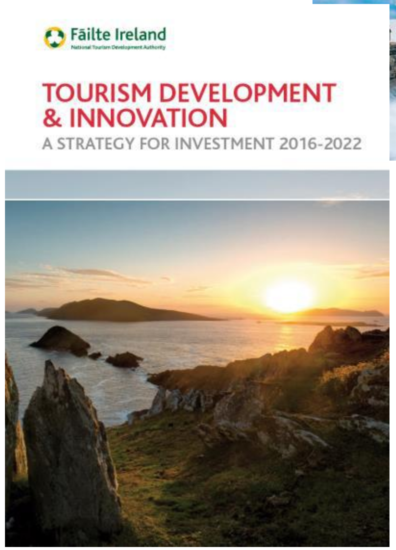
In February 2007 Ireland released a market driven national product development strategy to guide actions and investments during the period of 2007-2013. Additionally a Tourism Development & Innovation Strategy was launched for the period 2016-2022.

Approach

Existing research, consultation with the industry and a national product audit and quality assessment was undertaken. There was less focus on the accommodation sector and more focus on high-quality services and infrastructure. The audit revealed the volume, distribution and quality of products by region and by county. The actual ratings on the audit revealed how ready a product was for the tourism market.

The Tourism Development & Innovation Strategy placed an emphasis on building brand architecture for the delivery of tourism and on having a better understanding of the motivations of consumers through consumer segmentation.

Recommendations



The recommendations covered the following areas:

- Capital investment in the hard tourism product;
- Infrastructure and services relevant to tourists;
- The physical environment;
- Packaging and presentation; and
- Expanding the skills and capability of people working in the industry.

From a marketing perspective, Ireland aimed to connect specific products with the 'softer' elements such as quality, customer service, packaging, price, integration and unique attractions. A strong focus was placed on innovation to make sure that products adapt to changing market demands.

The Tourism Development & Innovation Strategy outlined core destination propositions capable of delivering on experiential pillars for target consumer segments and markets.

Case Study 1: Failte Ireland National Tourism Development Authority, cont'd.

Funding

It was recommended that an investment of € 280 million be made to support product development over the period 2007-2013.

Initiatives

- A fund for investment in a small number of new or reinvestment in some existing attractions to create attractions of international class
- A fund for creating a small number of major annual events
- Selection of 20 strategically important visitor attractions, with a good geographic spread, for upgrading
- Identification of a major historic building to be re-equipped for major events
- Support of product development through workplace focused learning. These should include 'action learning', learning networks and on-site learning
- Identification of the skills needed as customer demands change and products evolve. Examples include recent developments in the 'spa' and 'wellness' products
- Establishment of a program to provide 'start-up' and incubation business assistance to suppliers of key products like 'learn-to-golf' and 'learn-to-fish'
- Support of projects which improve content (imagery, stories etc.) and capability (apps, websites etc.) which ensures the sector operates to 'best in class' standards in the digital space [Tourism Development & Innovation Strategy]

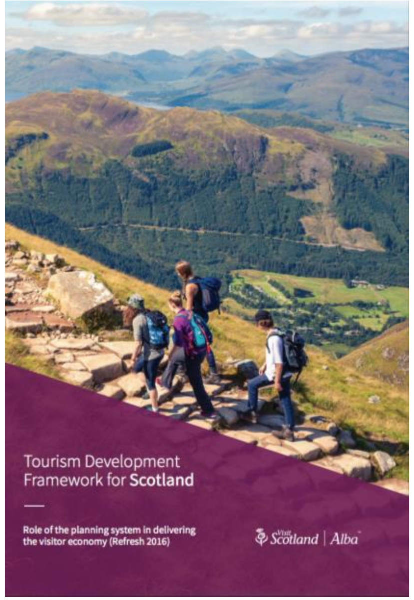
Case Study 2: Visit Scotland

Overview

First published in 2013, the Scotland Tourism Development Framework is the key reference guide that focuses on the importance of planning and the role it plays in growing the visitor economy. Tourism Scotland 2020 is the document that outlines operational matters related to service, skills, training and quality that impact the visitor experience.

Approach

Visit Scotland worked with over 90 other local and national organizations and industry partners to develop the Framework. The focus is on development planning to support sustainable growth. The Framework document was developed specifically for the use of development planning authorities in Scotland and it is connected to the overall strategy outlined in Tourism Scotland 2020.



Recommendations

The actions outlined in the Framework relate to two key product-related sections of Tourism Scotland 2020: Improving the Customer Journey and Providing Authentic Experiences. There are four priority themes under the two key sections.

Initiatives

- Coordinate local progress on product development through Action Development Plans
- Improve digital infrastructure to deliver better connectivity and support improvement of marketing and promotion efforts
- Encourage improvements to transportation hubs to enhance the visitor experience
- Identify locations for accommodation upgrades and new hotel investment
- Consider development opportunities along paths and trails, sea and marine and forest lands through partnerships

Case Study 3: Newfoundland and Labrador Department of Tourism, Culture, Industry and Innovation

RTO 9 Regional Tourism ORGANIZATION

Overview

The 2017-20 Tourism Product Development Plan was a commitment of the overarching 2009 Vision 2020 provincial tourism strategy. The 2017-20 Tourism Product Development Plan reflects private-public tourism development priorities and integrates regional Destination Development Plans. Additionally, the plan is linked to the provincial goal of reaching $1.6 billion in visitor spending by 2020.

Approach

The Tourism Product Development Plan was completed by the Department of Tourism, Culture, Industry and Innovation in partnership and consultation with private tourism businesses, non-profit operators, municipalities, regional and other tourism sector organizations and other partners.

Recommendations

There are four areas of focus outlined in the plan:

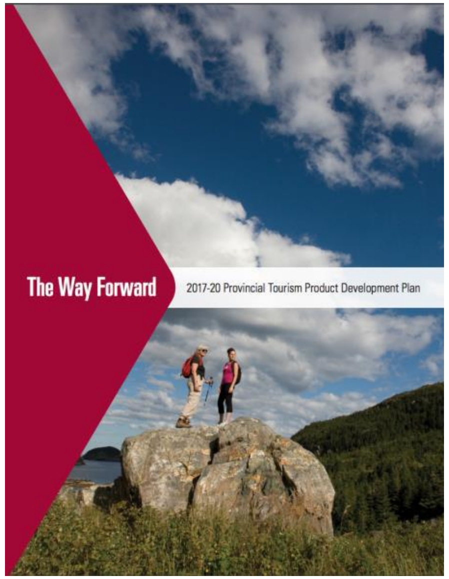
- Creating and Delivering Brand Experiences: People and Program-Based
- Enhancing Tourism Market- Readiness
- Collaborating to Compete
- Understanding Value and Success

Funding N\A

Case Study 3: Newfoundland and Labrador Department of Tourism, Culture, Industry and Innovation, cont'd.

Initiatives

- Establish tourism market-readiness guidelines to model the investment path for operators
- Brand Experience Tools. One deliverable was the Creating Experiences Toolkit which outlines destination competitive advantages, visitor profile, six local experiential tourism examples and a five step workbook to guide development of operator led tourism experiences
- Develop outreach tools to assist operators in accessing and understanding available research
- Set baseline measures for experience development and collaboration
- Identify multi-destination winter and shoulder season products through partnerships



Case Study 4: Travel Alberta

Overview

Travel Alberta implemented a 7-year Tourism Framework for 2013-2020 to align industry actions and shift the focus from products to the needs of travellers. The Framework is tied to the goal of achieving a $10.3 billion industry by 2020 and providing sustainable economic benefits to all regions of Alberta.

Approach

The product development strategy is integrated within the 2013-2020 Tourism Framework, which was a collaborative effort between the provincial government and industry partners.

The Framework identified 13 product clusters and assessed them against four dimensions:

- Market origin
- Product Supply (primary, secondary and emerging)
- Market Demand
- Tourism Region

Recommendations

There are five priorities outlined in the plan that detail actionable steps and opportunities. The first priority focuses on product innovation and development. This involves the development of innovative tourism experiences, destination renewal, and new destination areas.

Funding N/A

Case Study 4: Travel Alberta, cont'd.

Initiatives

- Enhancement of national and provincial parks as tourism destinations
- Focus on quality improvement for operators
- Support access to capital for refresh of existing products and new ones
- Within existing high potential areas for tourism enhancement tourism partners create new or highly enhanced experiences for the traveller using multiple operators; experiences will be packaged for sale through Canadian receptive operators and major tourism operators in overseas markets and for independent travellers from regional, domestic and US markets
- Co-operative marketing investment program for tourism operators who are developing or enhancing Alberta experiences for at least three years. Applicants qualify for up to 50% of marketing activities at a cap of $20,000 per application. Focus regions and experience categories were identified

Case Study 5: Northeastern Ontario (RTO13a)

RTO9 Regional Tourism ORGANIZATION

Overview

In 2015 RTO13a released a Product Development Strategy and Implementation Plan for Northeastern Ontario to ultimately enhance competitiveness in the region and ensure product development aligned with the vision and mission of the organization.

Approach

The Product Development Strategy and Implementation Plan was developed in consultation with two project committees and RTO staff. As part of the process there were 17 initiatives identified, assessed and scored for fit with the overall strategy.

Recommendations

The Plan outlined five key experiences and three tactics or activities for implementation over a three-year period (2015-2018). The tactics and activities were described as foundational to developing product in the region. The experiences were based upon key niche products such as fishing, group of seven, lodges and tourism loops.

Funding

It was recommended that an investment of $640,000 be allocated to implementation over the three-year period.

Initiatives

- Development of a program called Tourism Excellence North to spearhead a quality shift for experiences and offers
- Support of best bet products through alignment with best bet market ready operators and provide other operators with the tools to become a part of the program in the future
- Creation of product clusters for destination regions
- Selection of market-ready operators to join signature product clusters to elevate experiences
- Selection of the top five key demand generators within select categories (nature, fishing, festivals & events) that have potential to draw visitors to the north and assess them for site value and access/infrastructure

Case Study 6: Indigenous Tourism

Indigenous Tourism Association of Canada (ITAC)

Created in 2015, ITAC is the lead and coordinator for the development and marketing of indigenous tourism across Canada. ITAC: The Path Forward is a five-year strategic plan for growing Canada's indigenous tourism industry. The first strategic pillar is Development, and it includes actions related to increasing the number of export-ready experiences 'certified authentic' by ITAC and education and training initiatives.

Initiatives:

- Creation of standards, guidelines and best practices for Indigenous tourism businesses to achieve market and export-ready status
- Development of National Guidelines on Indigenous Cultural Experiences to inspire excellence and high standards. This included a checklist, resources and market research

Indigenous Tourism Ontario (ITO)

ITO is the independent organization responsible for leading and growing indigenous tourism sector in Ontario with the support of other partners such as the RTOs. In 2017, ITO released a 2020 Strategic Plan that is based on making indigenous tourism a priority in Ontario. The mission of the strategy is to build capacity in communities and amongst entrepreneurs to support the development of a portfolio of market ready products and services.

Initiatives:

- Following the strategy ITO introduced a Cultural Authenticity Program that aims to support, recognize and reward indigenous tourism businesses and entrepreneurs for their role in preserving and sharing cultural experiences in Ontario. Support provided through the program may include training and certifications, product delivery and refinement and/or marketing.

Case Study 6: Indigenous Tourism

Indigenous Tourism British Columbia

Indigenous Tourism BC is a resource for indigenous entrepreneurs and communities in British Columbia who are operating or looking to start a tourism business. Indigenous Tourism BC's 2018/19 Action Plan introduced four strategic pillars to drive and support the sector. The Experience Development pillar focuses on offering authentic training, product and experience development building programs. Actions fall under two key categories: accelerating authentic experience development and establishing a strong story to exhibit leadership.

Initiatives:

- Implementation of "Push for Market Readiness" Fund
- Activation of an authentic Aboriginal Program
- Invigoration of Stakeholder Engagement
- Cultivation of a more responsive Membership Strategy

Methodology & Sources

Methodology Overview

RTO9 Regional Tourism ORGANIZATION

The RTO9 Product Development Strategy process involved three phases as noted below: Analysis of Current Needs, Asset Mapping and the formation of the Strategic Plan. The Strategy was created based on interviews with RTO9 DMOs, a review of background documents and desk research by the consultants.

To complete asset mapping and develop the comprehensive asset inventory, the DMOs provided relevant asset lists and links with varying degrees of detail. It should be noted that due to limited time and resources available, the focus for asset mapping was on assets that attract visitors to the region – restaurants, retail and accommodations were excluded and products and services that are primarily for residents were also excluded. For this reason it is possible the asset inventory does not capture every product that is in a community. Additionally, the the asset inventory process did not involve an assessment of actual product and experience quality. Research was conducted in Winter 2019.

Phase 1

- **Analysis of Current Needs**

a) Review of best-practice in product development strategies

b) Demand analysis using RTO9 and Destination Ontario Research

c) Supply analysis including in-depth interviews with RTO9 DMOs

Phase 2

Asset Mapping

a) Development of comprehensive asset inventory aligned by product category, season, region and market and trade readiness for South Eastern Ontario tourism products and experiences including all attraction, event, festival and tour operator sub-categories

Phase 3

- **Strategic Plan**

a)product development plan including an overall strategy and implementation plan

b)Communication of plan to partners

Sources

	Sources
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