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RTO9, HASTINGS, LENNOX & ADDINGTON, FRONTENAC  
TOURISM ASSET INVENTORY ASSESSMENT

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Insights Report

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Twenty31 Consulting Inc.

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February 1, 2024 (Final Amended Report)

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tourism by design

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The recommendations contained herein are provided on a confidential basis to the client. The client is responsible for further due diligence required to assess potential and use of recommendations in whatever manner it chooses, including but not limited to releasing them to their stakeholders, partners, and/or media.

Information and data found in this document are current as of February 1, 2024.

February 1, 2024

# OVERVIEW

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- Project Background & Objectives
- Methodology
- Tourism Asset Inventory Overview & Analysis
- Tourism Assets Mapping
- Key Takeaways



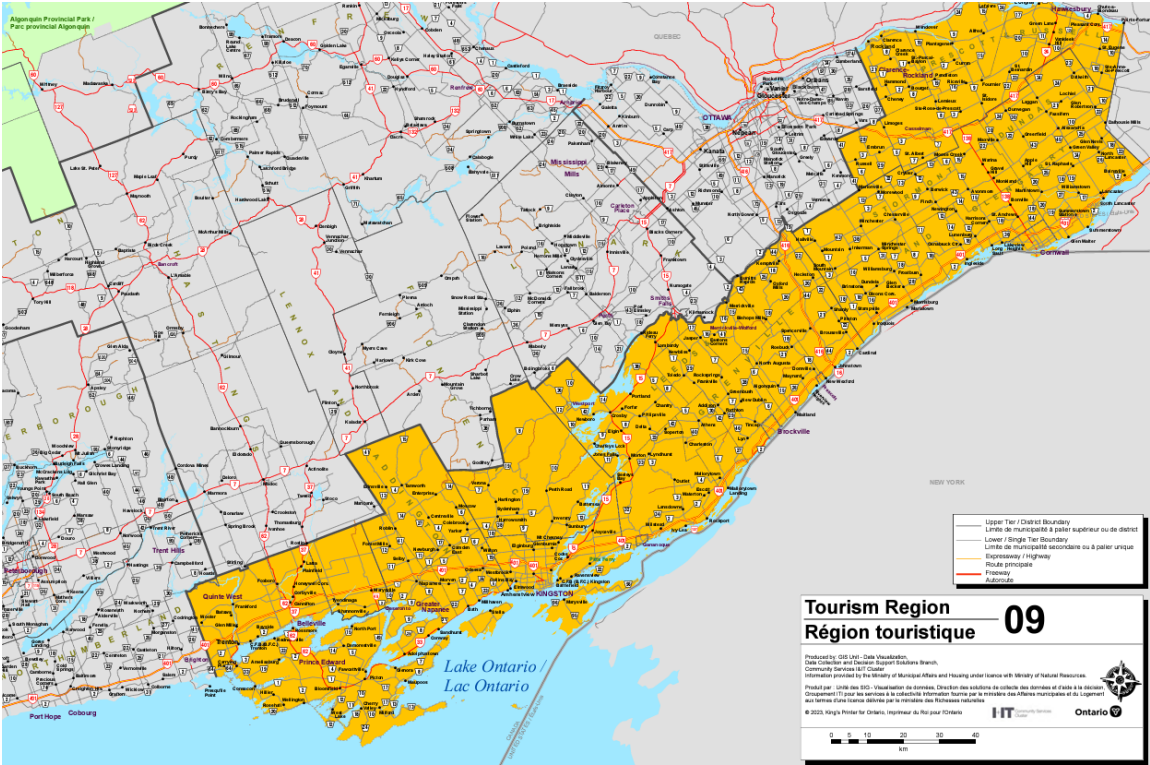
# PROJECT BACKGROUND

Tourism asset inventories are a powerful tool for regions like RTO9 to properly understand the size and geographical distribution of their tourism industry, becoming a key input to inform tourism leadership strategic decisions.

An asset inventory is a dynamic framework designed to support product and experience development, investment attraction, and marketing and promotion – It is not a static database.

A tourism asset inventory for South Eastern Ontario has been designed and organized in custom categories co-defined by RTO9, building the foundation for an iterative framework with the following attributes:

Customized fields	Tourism Vertical, Tourism Theme, Asset Type, Location, Social Media Platforms, Seasonality, Sustainability Standards, Market Readiness, Ownership Type, etc.
Dynamic	Leverages online sources such as Google Maps, TripAdvisor, AirBnB, DMO business directories, destination consumer websites, and other available public data.
Integrated into GIS	Allows to design multi-layered maps to determine tourism clusters, zones for development, dispersion, touring, and investment opportunities.
Updated and monitored	Becomes central to the organization’s operations and is easily maintained.
Linked to CRM	Potentially enables prioritization and segmentation of communications and engagement with key industry stakeholders and partners.



# PROJECT OBJECTIVES

The creation of a dynamic asset inventory and GIS product and experience mapping is designed to support RTO9's tourism development and management plans, and those of key tourism and community partners.

## KEY AREAS RTO9 WILL LEVERAGE THE TOURISM ASSET INVENTORY FOR:

- 1 Content development
- 2 Showing the size and power of tourism on a map
- 3 Gap analysis and cluster identification
- 4 Investment attraction
- 5 Partnerships and package development
- 6 Itineraries development



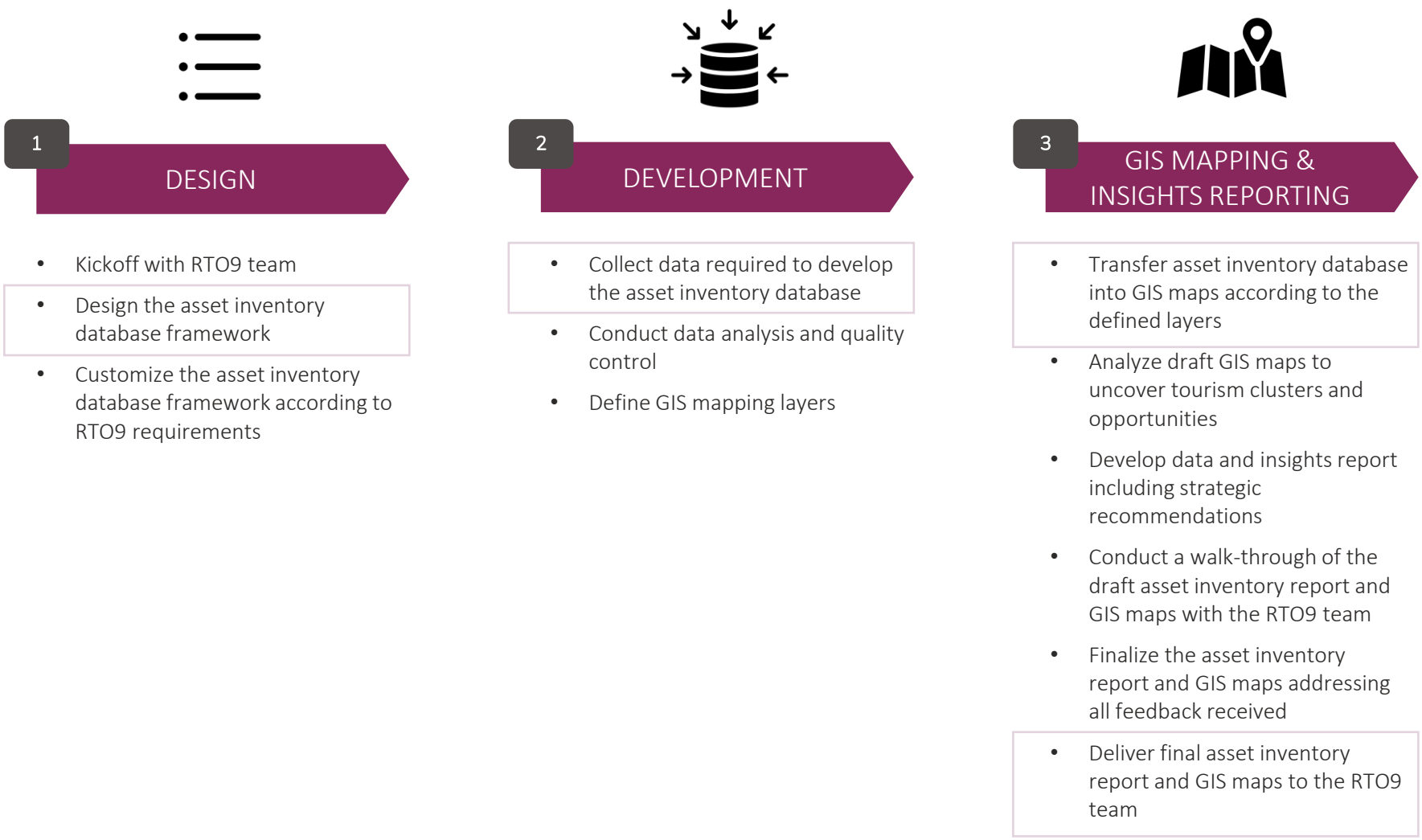
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# METHODOLOGY

The workplan ran over 3 phases to successfully deliver on the project objectives, including the design of an asset inventory database framework, extensive asset data collection, development of GIS maps, and summarizing into a final insights report.



# METHODOLOGY: DATABASE FRAMEWORK

The development of a custom tourism asset inventory database for RTO9, Hastings, Lennox & Addington and Frontenac allowed the capturing of detailed asset classification, location, information, seasonality...

	Mapping Category	Description	Options
Asset Classification	Tourism Vertical	Main tourism sector	Accommodation; Eating & Shopping; Activities & Entertainment; Attractions & Events; Community & Recreation Facilities; Parks & Trails; Infrastructure
	Tourism Theme	Main tourism essence	Culinary; Shopping/Retail; Business (MICE); Nature/Adventure/Ecotourism; Culture/Arts/Heritage; Beach/Marine; Entertainment; Sports; Agritourism; Wellness; Support/Amenities
	Asset Type	Specific tourism asset only considered if adding tourism value	Restaurant; Bar; Café; Hotel; Boutique Hotel/B&B; Motel/Hostel; AirBnB; Short Term Rental; Camping; Store/Shop; Mall; Activity/Tour; Transfer/Shuttle; Attraction; Event; Museum/Theatre; Sports Venue; Casino; Nightlife; Cruise; Winery/Distillery/Craft Beer; Spa; Farm/Market; Trail; Park; Parking; Bus Parking; RV Parking; EV Charging Station; Public Washroom; Private Washroom; Port/Marina/Waterfront; Airport; Railway Station
Location	Location	County where the tourism asset is located	Prince Edward County; Hastings; Lennox & Addington; Frontenac; Kingston; Leeds & Grenville; Stormont, Dundas and Glengarry, Prescott & Russell
	Regional Tourism Organization (RTO)	Regional Tourism Organization (RTO) where the tourism asset is located	RTO9; RTO11
	DMO	DMO responsible for where the tourism asset is located	Prince Edward County; Bay of Quinte; Lennox & Addington; Frontenac; Kingston; 1000 Islands & Rideau Canal Waterways; 1000 Islands Gananoque; Brockville; Cornwall; SDG Counties
	Latitude & Longitude	Tourism asset coordinates	(Free text)
Asset Information	Asset Description	Brief description of the tourism asset	(Free text)
	Asset/Business Name	Name of the tourism asset	(Free text)
	Address, Postal Code, Telephone & Website	Physical address, postal code, telephone number, and website of the tourism asset	(Free text)
	Social Media Platform	Social media platform where the tourism asset has a profile/account	Facebook; Twitter; Instagram; YouTube; LinkedIn; TikTok



# METHODOLOGY: DATABASE FRAMEWORK, CONT'D

...and attributes, while consolidating all regional tourism assets in a dynamic and editable format, creating a comprehensive data pool ready to dissect and analyze for multiple purposes.

	Mapping Category	Description	Options
Seasonality	Primary Season	Season where the tourism asset is open or operating at its fullest capacity	Year-round; Summer; Winter; Fall; Spring
	Shoulder Season	Season where the tourism asset is still open but operating at lower capacity	Summer; Winter; Fall; Spring
	Off-season	Season where the tourism asset is closed or non-operational	Summer; Winter; Fall; Spring
Asset Attributes	Sustainability Standards	Sustainability readiness of the tourism asset	Sustainability Policy: The asset has a public sustainability pledge, but no evidence of having received a certification; Sustainability Certification: The asset has been certified by a credible sustainability organization
	Market Readiness	How ready is the tourism asset to receive visitors	Business Ready: The asset is operational, but not offering tourism experiences to visitors; Market Ready: The asset is already selling tourism experiences to visitors, locally; Export Ready: The asset is selling tourism experiences both locally and internationally
	Ownership Type	Ownership type of the tourism asset	Public; Private; Public/Private
	Accommodation Category	Accommodation standard - only applicable to Accommodation assets	Economy; Midscale; Upscale; Luxury
	Hotel Rating	Hotel star rating - only applicable to certain accommodation types (Hotels)	1-star; 2-star; 3-star; 4-star; 5-star
	General Notes	Additional comments to be considered	(Free text)

# METHODOLOGY: GIS MAPPING

All tourism asset data was then transferred into specialized spatial mapping software (ArcGIS) to enable the design of a series of topographical maps, representing selected data layers relevant for the analysis.

## WHY GIS MAPS?

Tourism asset mapping provides an easily interpretable visual representation of the geographical dispersion and density of tourism assets throughout South Eastern Ontario.

The development of maps with the various layers of data uncovers:

- Tourism clusters
- Concentrations of tourism assets by specific category
- Areas of under development
- Areas of over development
- Potential tourism investment areas
- Potential touring routes and itineraries
- Areas of potentially sustainability risk and/or growth

## DATA LAYERS

Selected data layers have been identified based on their potential to provide meaningful insights on GIS maps. The following maps with RTO9’s regional/county boundaries and key tourism destinations have been designed:

1. **Tourism Vertical Overview** – display of asset location for all tourism vertical categories
2. **Tourism Theme Overview** – display of asset location for all tourism theme categories
3. **Specific Category Maps** – display of asset location and density for the selected tourism vertical and theme categories below:

- TOURISM VERTICAL:

Accommodation

Parks & Trails

- TOURISM THEME:

Culinary

Shopping/Retail

Business (MICE)

Nature/Adventure/  
Ecotourism

Culture/Arts/  
Heritage

Beach/Marine

Entertainment

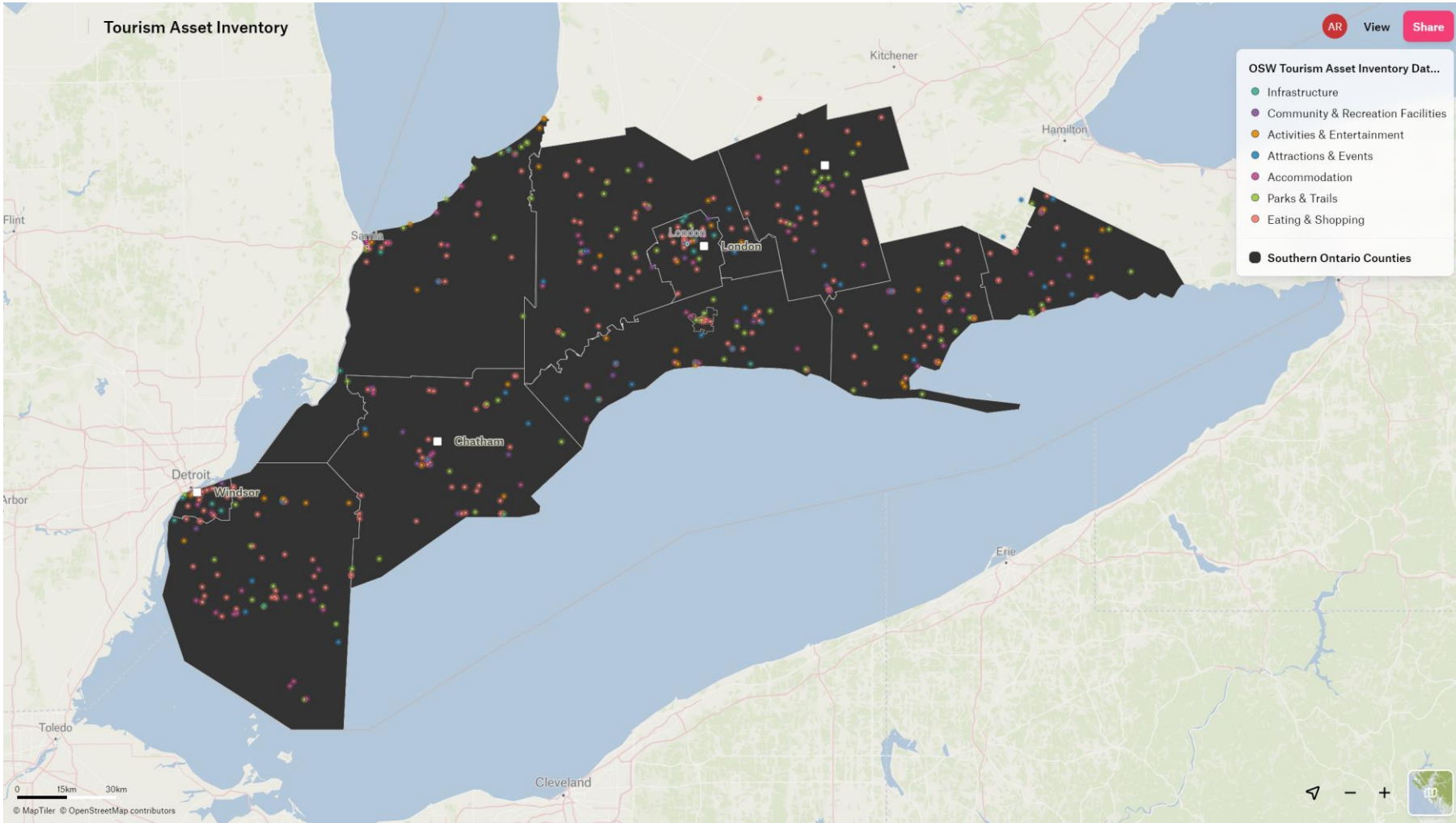
Sports

Agritourism

Wellness

# ONLINE TOURISM ASSET INVENTORY

Twenty31 guarantees the upload of RT09’s Tourism Asset Inventory database into an online dynamic GIS mapping software, as a post-project closure add-on.



## KEY IMPLICATIONS

- **Online GIS mapping software:** RTO9 will have access to a user-friendly GIS mapping software displaying regional dynamic maps, allowing to switch between different layers and visualization formats.
- **Maintenance & update:** RTO9 will be able to update its tourism asset inventory database and changes will be reflected on the online GIS maps.
- **Cost:** Twenty31 will offer this service with basic features to RTO9 at no additional cost, as an extension of the current project.
- **Expected delivery date:** September 1, 2023

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# RTO9 & COUNTIES TOURISM ASSET INVENTORY: TOURISM VERTICAL

Over 40% of tourism assets are related to Eating & Shopping, followed by Accommodation at 28%. Attractions & Events and Parks & Trails represent a small fraction of the absolute supply, but punch above their weight class in size\*.

TOURISM VERTICAL	RT09		Prince Edward County		Hastings (RTO9)		Lennox & Addington (RTO9)		Frontenac (RTO9)		Kingston		Leeds & Grenville		Stormont, Douglas and Glengarry		Prescott & Russell		Hastings		Lennox & Addington		Frontenac	
	n. Assets	%	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	%	n. assets	%	n. assets	%
TOTAL	3,198	100%	604	19%	288	9%	190	6%	94	3%	425	13%	705	22%	421	13%	471	15%	551	100%	226	100%	262	100%
Accommodation	885	28%	320	36%	89	10%	39	4%	34	4%	105	12%	182	21%	63	7%	53	6%	219	40%	53	23%	113	43%
Activities & Entertainment	172	5%	22	13%	13	8%	9	5%	12	7%	18	10%	54	31%	16	9%	28	16%	24	4%	9	4%	52	20%
Attractions & Events	266	8%	44	17%	22	8%	19	7%	9	3%	40	15%	63	24%	37	14%	32	12%	41	7%	21	9%	16	6%
Community & Recreation Facilities	147	5%	8	5%	21	14%	9	6%	3	2%	13	9%	46	31%	20	14%	27	18%	25	5%	9	4%	5	2%
Eating & Shopping	1297	41%	158	12%	111	9%	87	7%	30	2%	202	16%	256	20%	207	16%	246	19%	198	36%	100	44%	52	20%
Infrastructure	131	4%	21	16%	9	7%	3	2%	3	2%	24	18%	40	31%	22	17%	9	7%	9	2%	3	1%	4	2%
Parks & Trails	300	9%	31	10%	23	8%	24	8%	3	1%	23	8%	64	21%	56	19%	76	25%	35	6%	31	14%	20	8%

RT09 county subset statistics

Full county statistics



# RTO9 & COUNTIES TOURISM ASSET INVENTORY: TOURISM VERTICAL, CONT'D

Over 40% of tourism assets are related to Eating & Shopping, followed by Accommodation at 28%. Attractions & Events and Parks & Trails represent a small fraction of the absolute supply, but punch above their weight class in size\*.

## KEY IMPLICATIONS:

- Leeds & Grenville has the largest concentration of **tourism assets** (22%) within the South Eastern Ontario region, followed by Prince Edward County (19%), Prescott & Russell (15%), Kingston (13%) and Stormont, Douglas and Glengarry (13%). Hastings, Lennox & Addington and Frontenac, make up 9%, 6% and 3% of the total region's assets, respectively.
- Under a third of South Eastern Ontario's **Accommodation** assets are located within Prince Edward County (36%), Leeds & Grenville (21%), Kingston (12%) and Hastings (10%), while there is a shortage of options in Prescott & Russell (6%), Lennox & Addington (5%), and Frontenac (4%).
- Leeds & Grenville has the highest concentration of **Activities & Entertainment** (31%) followed by Prescott & Russell (16%), while Lennox & Addington (5%), Frontenac (7%) and Hastings (8%) has the lowest number of tourism assets in this category.
- Leeds & Grenville also leads in number of **Attraction & Events** assets (24%), followed by Prince Edward County (17%) and Kingston (15%).
- Leeds & Grenville captures the most of the **Community & Recreation Facilities** assets (31%), followed by Hastings (14%).
- South Eastern Ontario boasts the largest number of tourism assets in **Eating & Shopping** (41%), with Leeds & Grenville (20%), Prescott & Russell (19%), Stormont, Douglas and Glengarry (16%), and Kingston (16%) making up most of this share.
- **Infrastructure** accounts for the lowest number of tourism assets in South Eastern Ontario (4%). Leeds & Grenville (31%) makes up a third of these assets, followed by Kingston (18%) and Stormont, Douglas and Glengarry (17%), while Lennox & Addington and Frontenac contribute 2% each to the total.
- Prescott & Russell (25%) has the highest number of **Parks & Trails** followed by Leeds & Grenville (21%), however, this tourism asset is fairly consistent throughout the region, with Stormont, Douglas and Glengarry (19%), Price Edward County (10%), Lennox & Addington (8%), Hastings (8%) and Kingston (8%) contributing towards more than half the absolute number parks and trails in South Eastern Ontario. Although Frontenac contributes 1% in absolute numbers to Parks & Trails assets in RTO9, the county makes up its contribution in area size of the asset\*.
- Just over half (52%) of all **Hastings** tourism assets are located within the RT09 region, with 100% of assets in Infrastructure; and the majority of its Community & Recreation Facilities (84%) and Parks & Trails (66%) within RTO9.
- **Lennox & Addington** has 84% of its tourism assets within RT09 with all Activities & Entertainment, Community & Recreation Facilities and Infrastructure assets belonging to the region.
- **Frontenac** has just over a third of its total tourism assets (36%) located within RT09 with the majority of its Parks & Trails (85%) Activities & Entertainment (77%), Accommodation (70%) assets outside of the RT09 region. However, the majority of Infrastructure (75%), Community & Recreation Facilities (60%), Eating & Shopping (58%) and Attractions & Events (56%) are within the RTO9 region.

# RTO9 & COUNTIES TOURISM ASSET INVENTORY: TOURISM THEME

Business (MICE) and Culinary tourism assets each make up just under a third of South Eastern Ontario's tourism assets. Assets relating to Nature/Adventure/Ecotourism and Culture/Arts/Heritage contribute significantly.

TOURISM THEME	RT09		Prince Edward County		Hastings (RTO9)		Lennox & Addington (RTO9)		Frontenac (RTO9)		Kingston		Leeds & Grenville		Stormont, Douglas and Glengarry		Prescott & Russell		Hastings		Lennox & Addington		Frontenac	
	n. assets	%	n. assets	% total	n. assets	% total	n. Assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	% total	n. assets	%	n. assets	%	n. assets	%
TOTAL	3,198	100%	604	19%	288	9%	190	6%	94	3%	425	13%	705	22%	421	13%	471	15%	551	100%	226	100%	262	100%
Agritourism	190	6%	58	31%	7	4%	19	10%	6	3%	4	2%	49	26%	30	16%	17	9%	13	2%	20	9%	12	5%
Beach/Marine	104	3%	19	18%	8	8%	2	2%	5	5%	9	9%	41	39%	13	13%	7	7%	9	2%	4	2%	29	11%
Business (MICE)	851	27%	309	36%	89	10%	39	5%	29	3%	100	12%	164	19%	63	7%	58	7%	180	33%	50	22%	89	34%
Culinary	851	27%	71	8%	95	11%	58	7%	20	2%	172	20%	171	20%	148	17%	116	14%	141	26%	67	30%	31	12%
Culture/Arts/ Heritage	227	7%	38	17%	16	7%	13	6%	7	3%	40	18%	56	25%	34	15%	23	10%	28	5%	15	7%	9	3%
Entertainment	58	2%	8	14%	8	14%	0	0%	2	3%	11	19%	17	29%	4	7%	8	14%	10	2%	35	15%	4	2%
Nature/Adventure/ Ecotourism	364	11%	42	12%	29	8%	28	8%	13	4%	26	7%	84	23%	61	17%	81	22%	92	17%	17	8%	67	26%
Shopping/Retail	273	9%	32	12%	9	3%	14	5%	5	2%	26	10%	39	14%	30	11%	118	43%	43	8%	9	4%	11	4%
Sports	151	5%	7	5%	20	13%	9	6%	3	2%	13	9%	43	28%	20	13%	36	24%	24	4%	2	1%	4	2%
Support/Amenities	110	3%	18	16%	5	5%	2	2%	3	3%	22	20%	38	35%	18	16%	4	4%	5	1%	7	3%	4	2%
Wellness	19	1%	2	11%	2	11%	6	32%	1	5%	2	11%	3	16%	30	0%	3	16%	6	1%	20	9%	2	1%

RTO9 county subset statistics

Full county statistics

# RTO9 & COUNTIES TOURISM ASSET INVENTORY: TOURISM THEME, CONT'D

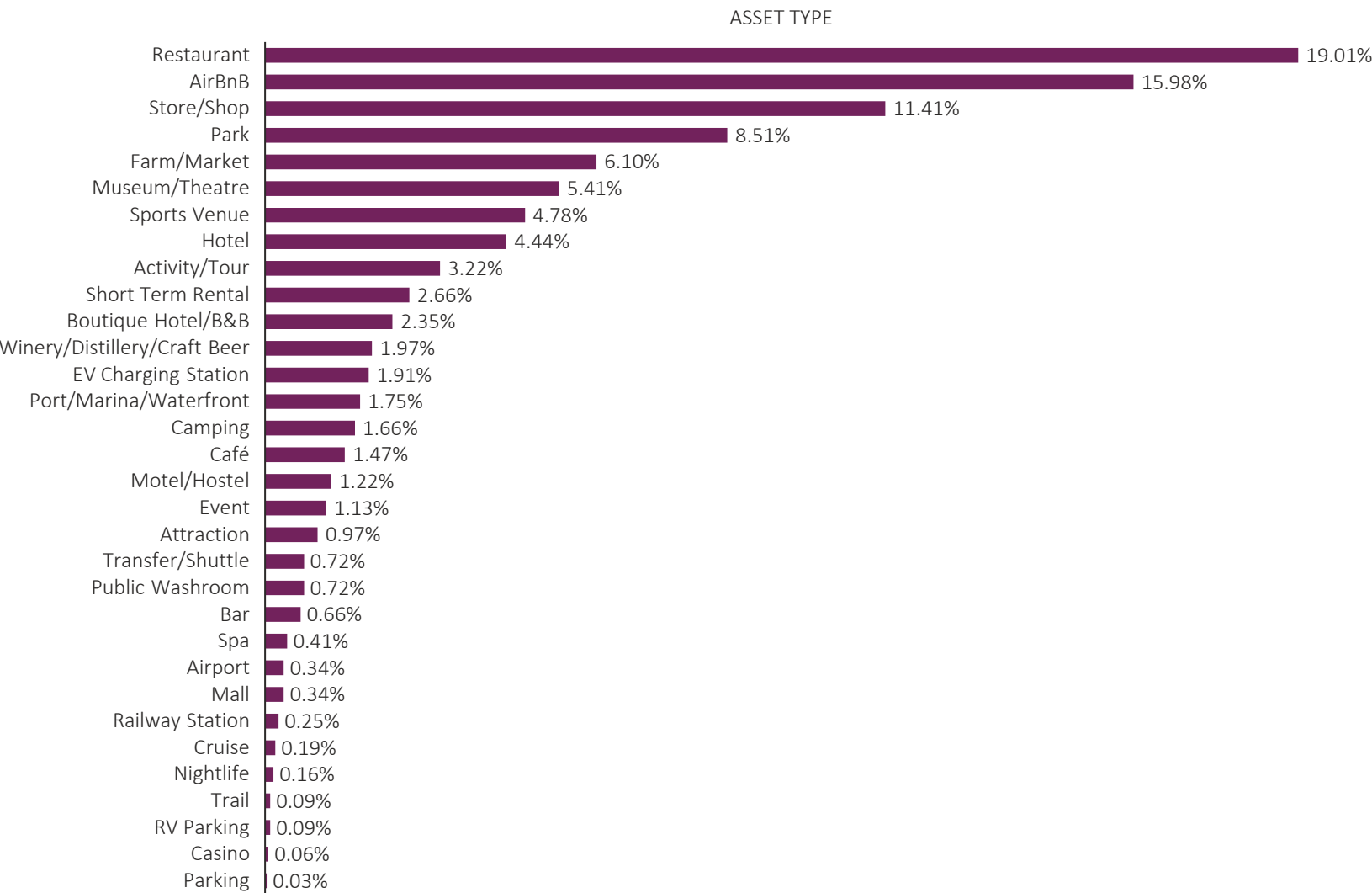
Business (MICE) and Culinary tourism assets each make up just under a third of South Eastern Ontario's tourism assets. Assets relating to Nature/Adventure/Ecotourism and Culture/Arts/Heritage contribute significantly.

## KEY IMPLICATIONS:

- The majority of South East Ontario's **Agritourism** assets are located in Prince Edward County (31%), Leeds & Grenville (26%) and Stormont, Douglas and Glengarry (16%).
- Just under 60% of **Beach & Marine** assets are situated in Leeds & Grenville (39%) and Prince Edward County (18%).
- Tourism assets focused on **Business (MICE)** and **Culinary** dominate the South Eastern Ontario region, each at 27% of all assets within the RTO9 region.
- **Business (MICE)** are mostly in Prince Edward County (36%) and Leeds & Grenville (19%). The greater Frontenac (34%), Hastings (33%), and Lennox & Addington (22%) counties have a high density of Business (MICE) assets, with 33%, 49%, and 78%, respectively, located within the RTO9 region.
- **Culinary** tourism assets seem to be evenly spread across Kingston (20%), Leeds & Grenville (20%) and Stormont, Douglas and Glengarry (17%) with limited options in Prince Edward County (8%), Lennox & Addington (7%) and Frontenac (2%).
- **Culture/Arts/Heritage** assets are relatively spread across Leeds & Grenville (25%), Kingston (18%), Prince Edward County (17%) and Stormont, Douglas and Glengarry (15%).
- Almost half of South East Ontario's **Entertainment** offering is located in Leeds & Grenville (29%) and Kingston (19%), with Prescott & Russell (14%), Hastings (14%) and Prince Edward County (14%) offering relatively sizeable assets. Entertainment assets in South East Ontario remain relatively low overall (2%).
- Leeds & Grenville (23%) and Prescott & Russell (22%) make up just under half of **Nature/Adventure/Ecotourism** assets within RTO9, followed by Stormont, Douglas and Glengarry (17%) and Prince Edward County (12%).
- Prescott & Russell (43%) is the hub for **Shopping & Retail** assets, followed by Leeds & Grenville (14%), Prince Edward County (12%), and Stormont, Douglas and Glengarry (11%).
- Leeds & Grenville hosts the largest number of **Sports** assets (28%), followed closely by Prescott & Russell (24%).
- In terms of providing **Support and Amenities** to enable the visitor experience, just under 90% are located in Leeds & Grenville (35%), Kingston (20%), Prince Edward County (16%) and Stormont, Douglas and Glengarry (16%).
- Offerings related to **Wellness** are generally not well-represented in South Eastern Ontario (1%), posing an opportunity for the region. Lennox & Addington (32%), Leeds & Grenville (16%), and Prescott & Russell (16%) are the highest contributors to Wellness tourism assets in RTO9.
- **Hastings County** has more than 80% of its Beach/Marine (89%), Sports (83%) and Entertainment (80%) tourism assets located within the RTO9 region.
- **Lennox & Addington** has, on average, 84% of all other tourism assets located within the RTO9 region.
- Even though **Frontenac** ranks low in most tourism theme categories, due to only having 36% of its tourism assets within RTO9, the county is largely well-rounded with a variety of assets across themes, barring Wellness offerings (1%). Most of its assets in Culture/Arts/Heritage (78%), Sports (75%) and Support/Amenities (75%) are located in RTO9.

# RTO9 TOURISM ASSET INVENTORY ANALYSIS: ASSET TYPE

Although AirBnB-style accommodation and Restaurants are the most common tourism assets, a significant density of Shops, Parks, Farms & Markets, Museums & Theatres, Hotels and Sports Venues define the tourism uniqueness of the region.

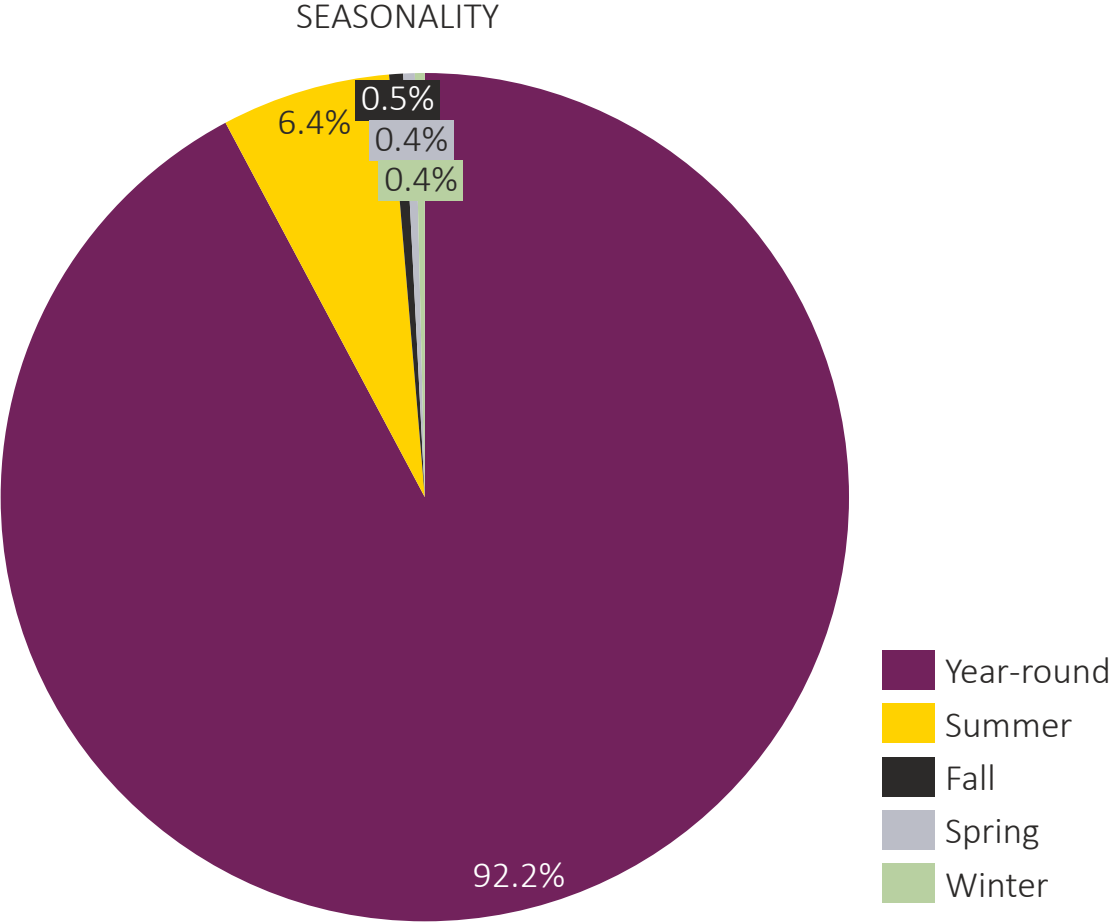


## KEY IMPLICATIONS

- In line with most destinations, Restaurants represent one of the largest tourism asset type in South East Ontario (19.0%), while Cafés(1.5%) and Bars(0.7%) complete the culinary scene.
- AirBnB’s are the most common accommodation option (15.98%), but this tourism vertical shows significant diversity, with Hotels (4.4%), Short Term Rentals (2.7%), Boutique Hotels/ B&Bs (3%) Camping grounds (2.4%) and Motels/Hostels (1.2%).
- 11.4% of assets in the region are small and medium-sized Stores/Shops with focus on tourism to some extent, therefore excluding conventional retail venues from this analysis – Malls are not present (0.3%).
- Parks account for 8.5% of all tourism assets, providing multiple opportunities for outdoor recreation and events, as these are located next to the coastline, in nature scenic areas, or within main cities.
- Farms/Markets represent 6.1% of Ontario’s South East tourism assets, which is a clear indication of the region’s focus on agritourism. Similarly, Museums/Theatres (5.4%) and Sport Venues (4.8%) show a significant density of culture and sport-related assets.
- There is a healthy number of Activity/Tour operators (3.2%) while assets hosting Wineries/Distilleries/Craft Breweries (2.0%) provide another differential to Ontario’s South East.

# RTO9 TOURISM ASSET INVENTORY ANALYSIS: SEASONALITY

The majority of tourism assets in South Eastern Ontario are operational all year-round, according to information provided on the public domain, while a small share of these (7.8%) are subject to seasonality and only open during summer or spring.



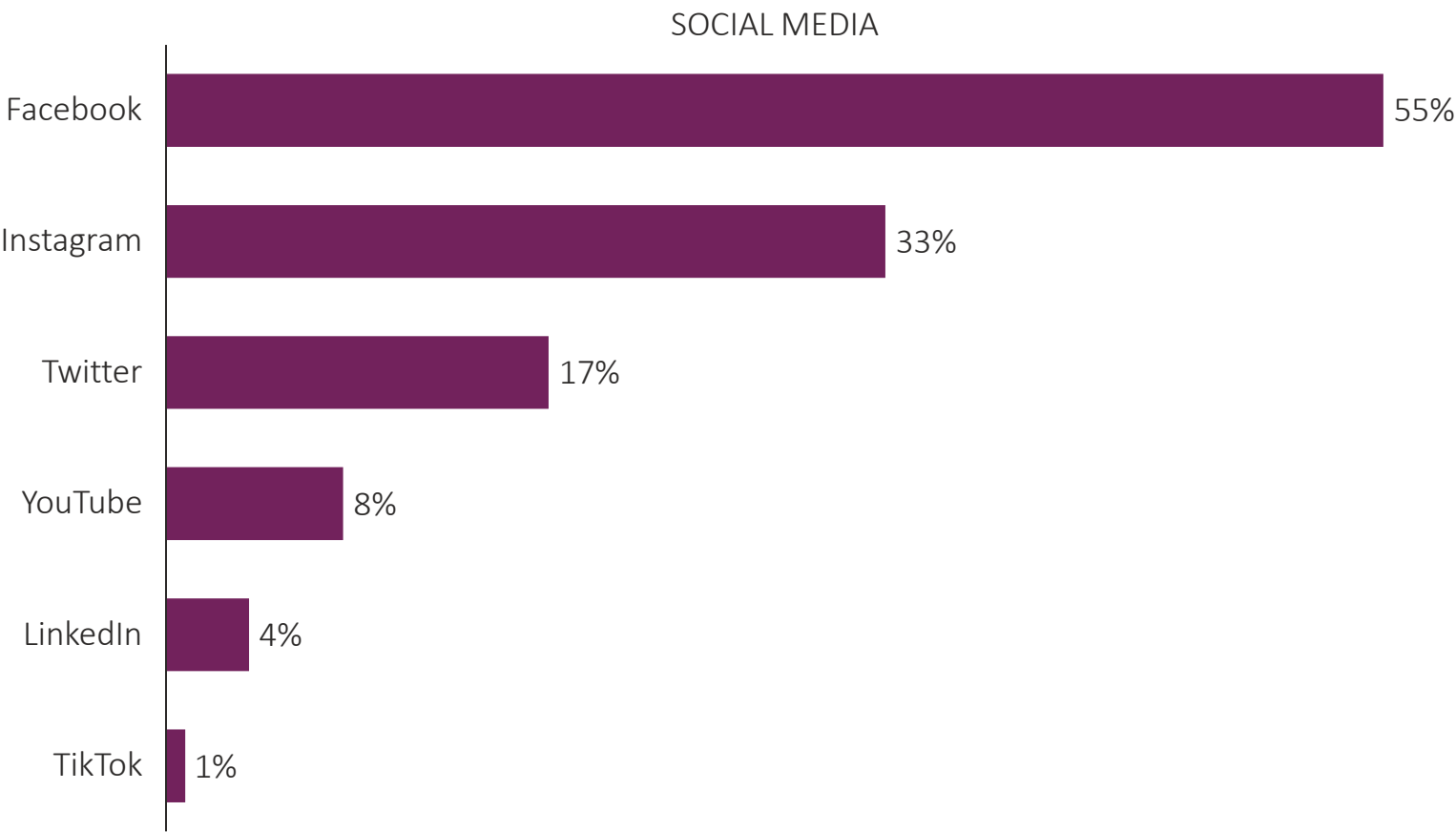
## KEY IMPLICATIONS

- 92.2% of tourism assets are operational or open year-round, based on the opening times and information available on the public domain and/or asset/business sites – however, there is a high likelihood that the actual number of year-round tourism assets is lower.
- On the other hand, 6.4% of tourism assets in South Eastern Ontario are only operational or open during the summer season – this is the case of several outdoor recreation assets, waterfront/marine activity operators, or outdoor F&B venues.
- The remaining assets have their primary seasons either in spring, winter or fall.



# RTO9 TOURISM ASSET INVENTORY ANALYSIS: SOCIAL MEDIA

More than half of tourism assets in South Eastern Ontario have at least one social media channel, with Facebook being the most popular, and a third rely on Instagram for promotion and visitor experience enhancement.

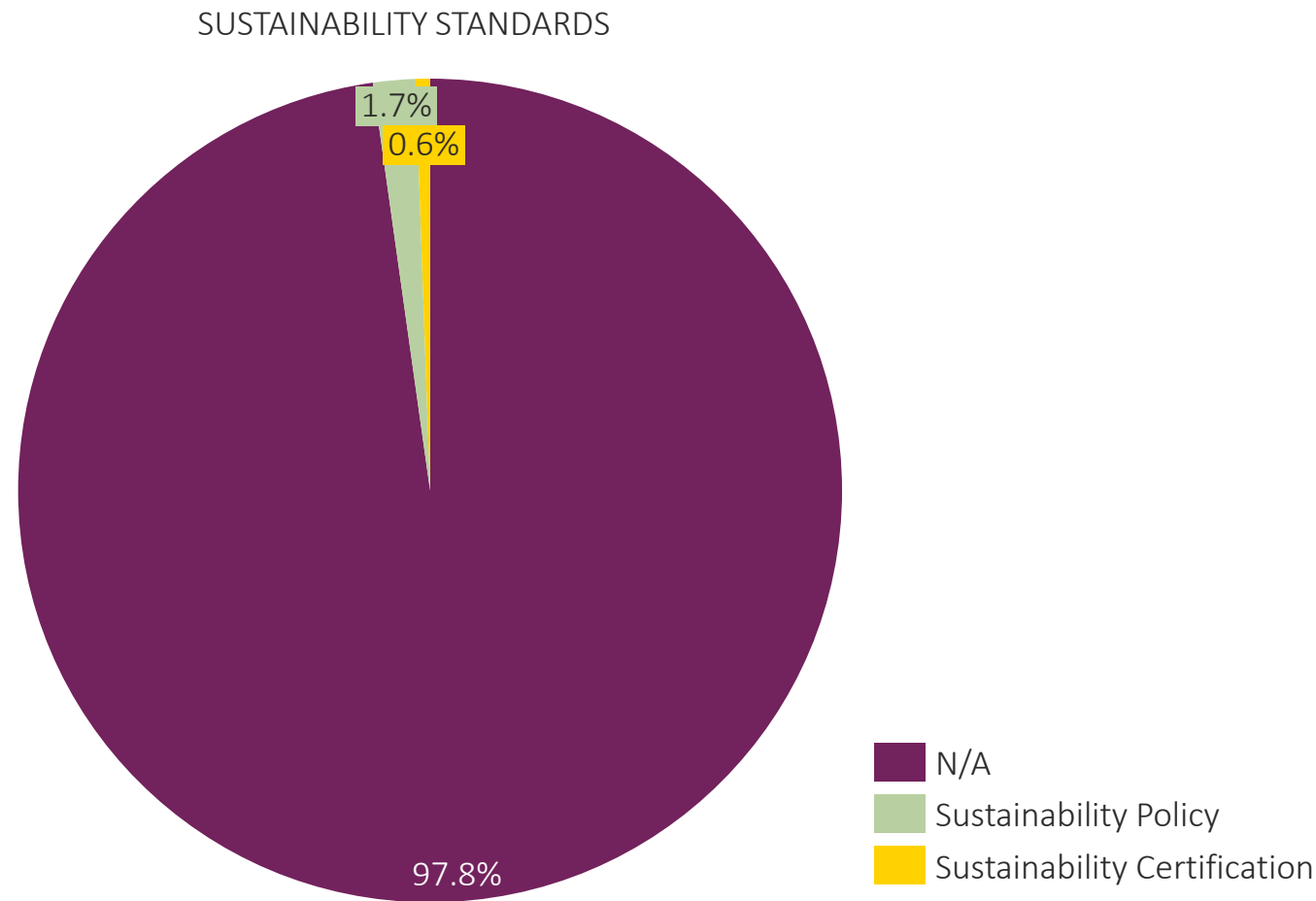


## KEY IMPLICATIONS

- Facebook is the most adopted social media channel with 55% of South Eastern Ontario tourism assets owning a page.
- 33% of the region’s tourism assets have an Instagram profile, a social media channel that has steadily grown among tourism businesses due to its high influence on the discovery of products and experiences.
- Following from a distance, 17% of tourism assets are leveraging Twitter to provide brief updates and establish an effective customer service channel.
- YouTube (8%), LinkedIn (4%), and TikTok (1%), have a more limited presence as per their niche nature – however, a dramatic increase of TikTok’s adoption should be expected moving forward, which may cannibalize Instagram’s usage.

# RTO9 TOURISM ASSET INVENTORY ANALYSIS: SUSTAINABILITY STANDARDS

Only 1.7% of the region’s tourism assets have a sustainability policy or pledge in place, while just 0.6% is possesses an official sustainability certification.

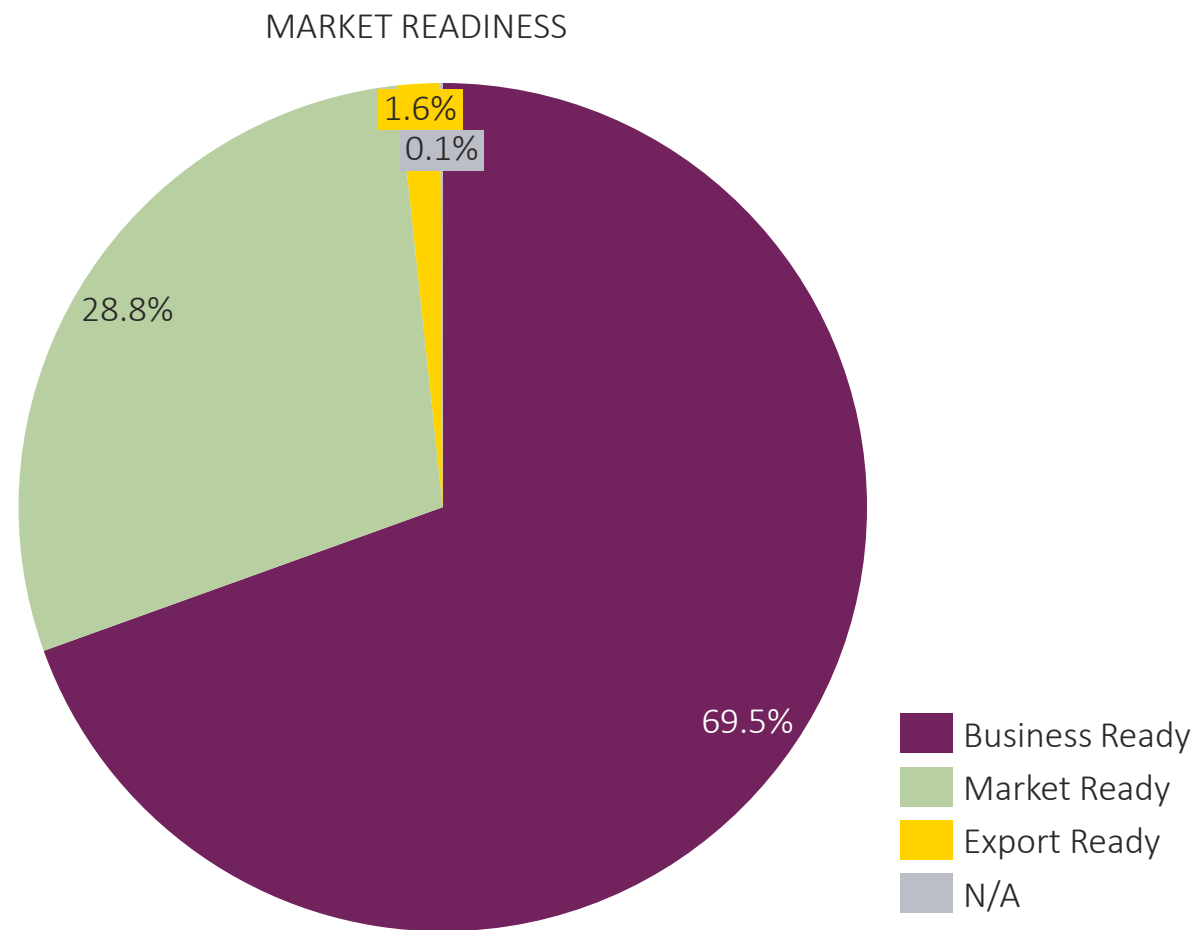


## KEY IMPLICATIONS

- A total of 3 criteria were used to evaluate the sustainability standards of RTO9 tourism assets:
- Sustainability Certification:** The asset has been certified by a credible sustainability organization and is visible on its website through the corresponding stamp/logo, or is properly mentioned.
  - Sustainability Policy:** The asset has a public sustainability pledge, but no evidence of having received a certification. This may involve a dedicated sustainability section on their website and/or proof of sustainability campaigns/practices carried out by the asset/business.
  - N/A:** The asset does not publicly communicate having obtained a sustainability certification or implemented sustainability standards of any kind – it may be that a significant number of assets are in fact following sustainable practices, but are not communicating these on the public domain.
- These results show the potential opportunity to incentivize tourism assets in RTO9 to either promote their existing sustainability policy or enrol in dedicated certification programs.

# RTO9 TOURISM ASSET INVENTORY ANALYSIS: MARKET READINESS

More than two-thirds of South Eastern Ontario’s tourism assets are ready to provide a catered tourism experience to visitors, with 28.8% being Market Ready. Only 1.6% of RTO9’s tourism assets are considered Export Ready.



## KEY IMPLICATIONS

A total of 3 criteria were used to evaluate the market readiness of RTO9 tourism assets:

- **Business Ready:** Refers to a business/product which has all of their licenses, permits and insurance in place in order to operate legally; and/or the product or experience exists predominantly for local residents without a great deal of signage, interpretive facilities and/or equipment for rent to access the product or experience.
- **Market Ready:** Refers to a business/product that markets to potential visitors, that communicates with potential visitors year-round, and is ready to accept advanced reservations; and/or the product or experience is designed with signage, interpretive facilities and/or equipment for rent to effectively access the product or experience.
- **Export Ready:** Refers to a business/product that markets to and through travel trade distribution sales channels, understands commission or net rate pricing, and agrees to trade bookings and a cancellation policy; and/or the product or experience is designed for and attracts tourists looking for a defined experience (the destination offering the product/experience has a unique competitive advantage).

## OVERVIEW

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- Project Background & Objectives
- Methodology
- Tourism Asset Inventory Overview & Analysis
- Tourism Assets Mapping
- Key Takeaways

# RT09 TOURISM ASSET MAPPING

## TOURISM VERTICAL OVERVIEW

Tourism assets are relatively spread across South Eastern Ontario, but some counties capitalize a significant share of the total supply.

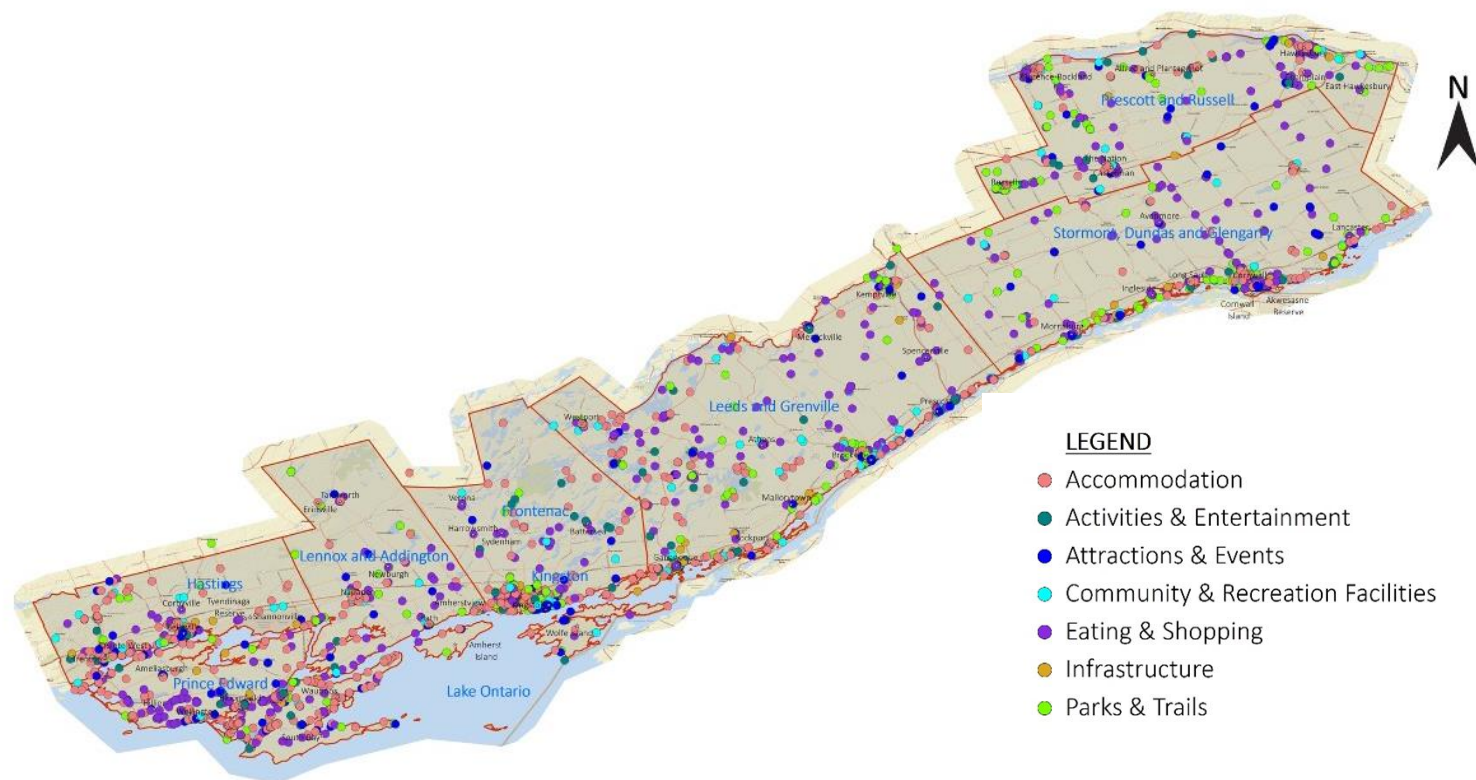
This is the case of Leeds & Grenville, where 22% of the region's tourism assets are located. Together with Prince Edward County (19%), Prescott & Russell (15%), Kingston (13%), Stormont, Douglas & Glengarry (13%), and Hastings (11%), these counties own just over two-thirds of South Eastern Ontario's tourism assets.

Almost 40% of South Eastern Ontario's tourism assets are related to Eating & Shopping and 28 % related to Accommodation, while Community & Recreation Facilities, Activities & Entertainment and Infrastructure represent a small fraction of the supply.

While a high concentration of assets is visible on the southern border and coastline of the RT09 region, there are inland clusters seen in Hastings, Lennox & Addington and Leeds & Grenville.

On the other hand, further inland areas of Lennox & Addington, Frontenac, Leeds & Grenville and Stormont, Douglas & Glengarry are underutilized.

## DISTRIBUTION OF TOURISM ASSETS BY VERTICAL





# RTO9 TOURISM ASSET MAPPING

## TOURISM THEME OVERVIEW

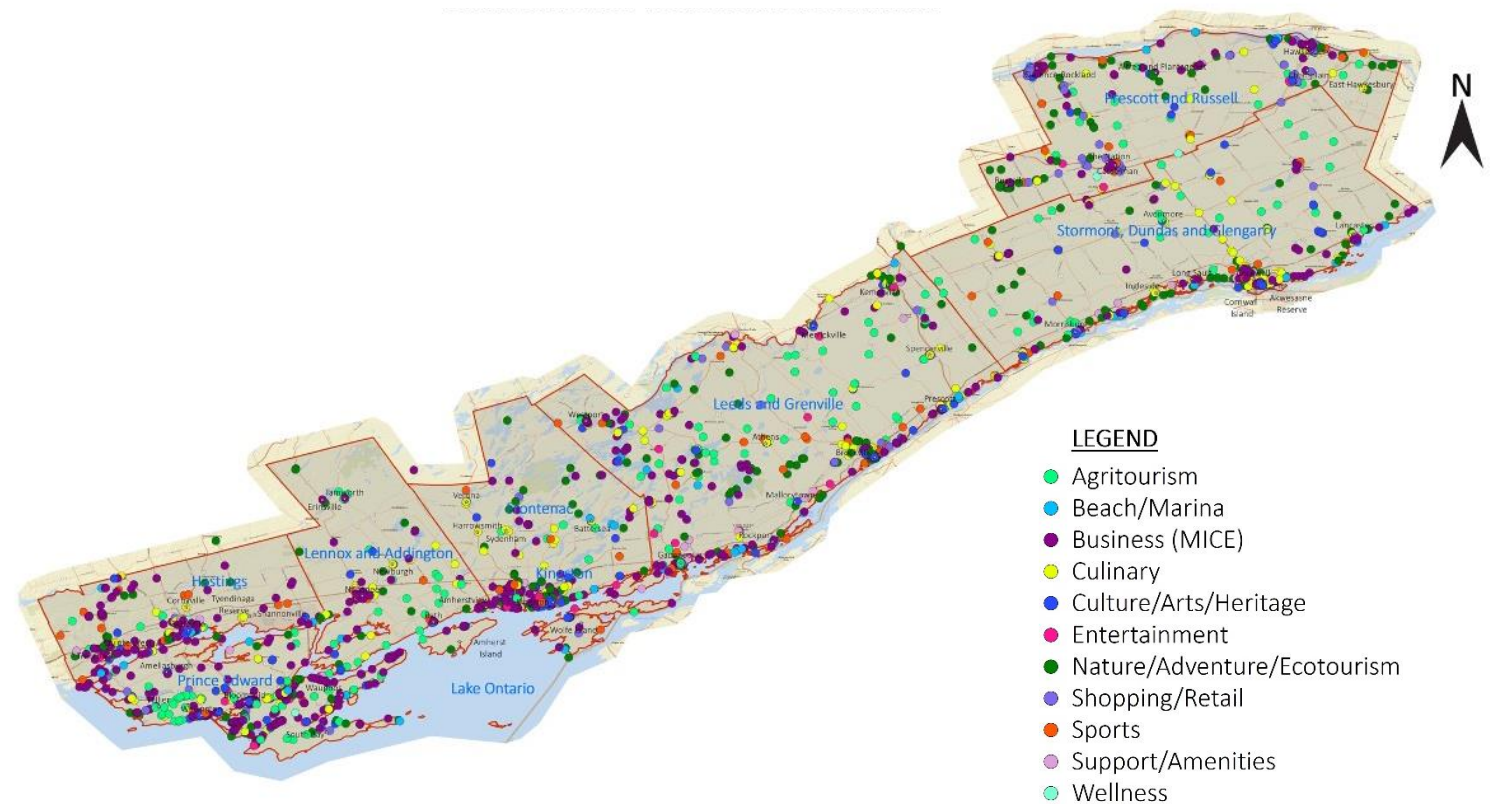
Tourism asset distribution on the Tourism Theme map is exactly the same as on the Tourism Vertical map, as different mapping categories for the same assets are being displayed.

Business (MICE) (27%) and Culinary (27%) assets represent more than half of South Eastern Ontario's tourism assets, while assets related to Nature/Adventure/Ecotourism (11%) and Culture/Arts/ Heritage (7%) have a significant weight.

In areas with low concentration of tourism assets, Agritourism businesses are filling the gap – this is especially visible in Leeds & Grenville and Stormont, Douglas & Glengarry counties. This is a similar case for Nature/ Adventure/ Ecotourism assets, but such tourism assets have significant clusters on the coastal areas too.

Entertainment, Shopping/Retail, and Business (MICE) assets are clustered around urban areas, while Culture/Arts/Heritage also show relative presence in the more rural areas.

## DISTRIBUTION OF TOURISM ASSETS BY THEME



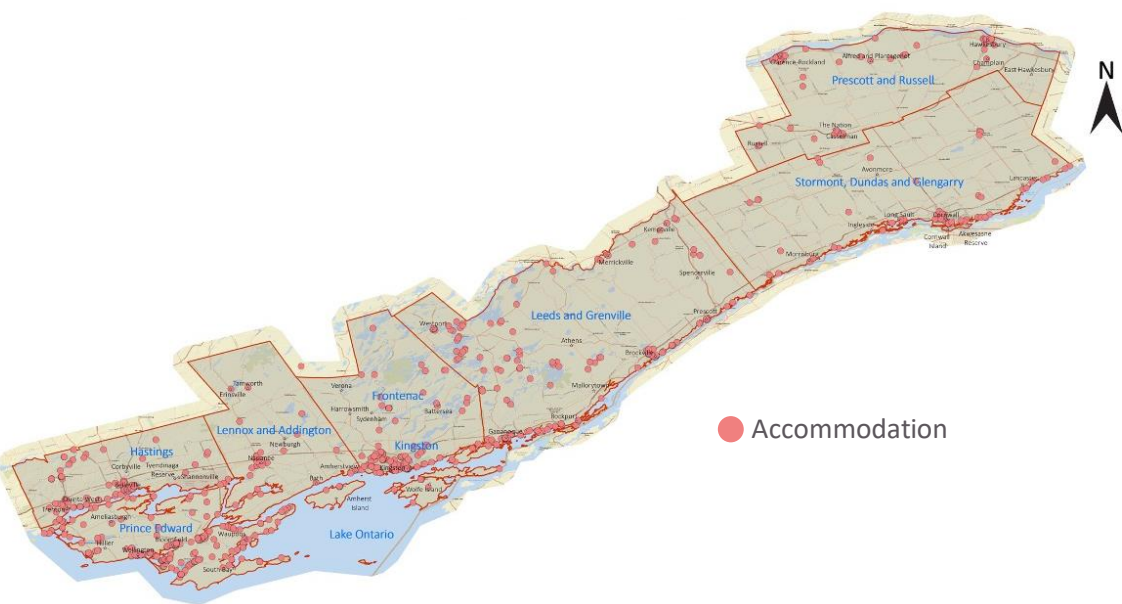
# RTO9 TOURISM ASSETS MAPPING: ACCOMMODATION

Accommodation represents 28% of South Eastern Ontario’s tourism assets, with 885 assets.

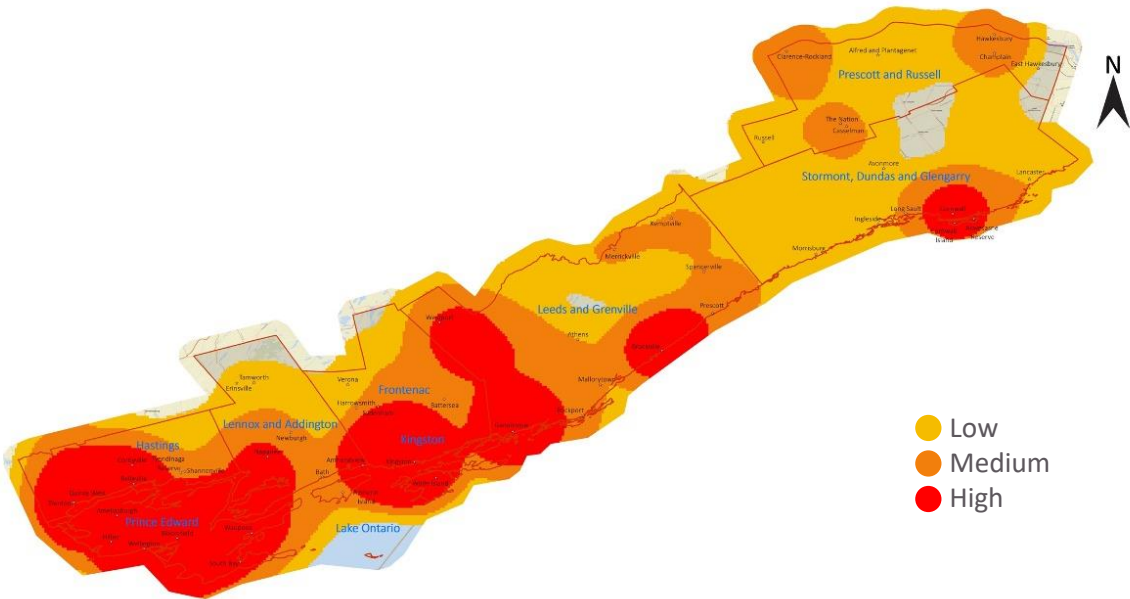
More than half of the Accommodation offering in the region is located in Prince Edward County (36%) and Leeds & Grenville (21%), while there is a shortage of options in Lennox & Addington (4%) and Frontenac (3%).

- **CLUSTERS:** Prince Edward is flush with accommodation with three main clusters in the county, while further clusters exist in parts of Hastings and Kingston. Leeds & Grenville has three main clusters and Stormont, Douglas & Glengarry has a cluster near Cornwall.
- **GAPS:** This assessment demonstrates the lack of accommodation in some counties such as Frontenac, Prescott & Russell and Stormont, Douglas & Glengarry, as well as upper regions of Lennox & Addington and central areas of Leeds & Grenville.

DISTRIBUTION OF ACCOMMODATION ASSETS



DENSITY OF ACCOMMODATION ASSETS



# RTO9 TOURISM ASSETS MAPPING: PARKS & TRAILS

Parks and Trails represents 9% of South Eastern Ontario’s tourism assets, with 300 assets.

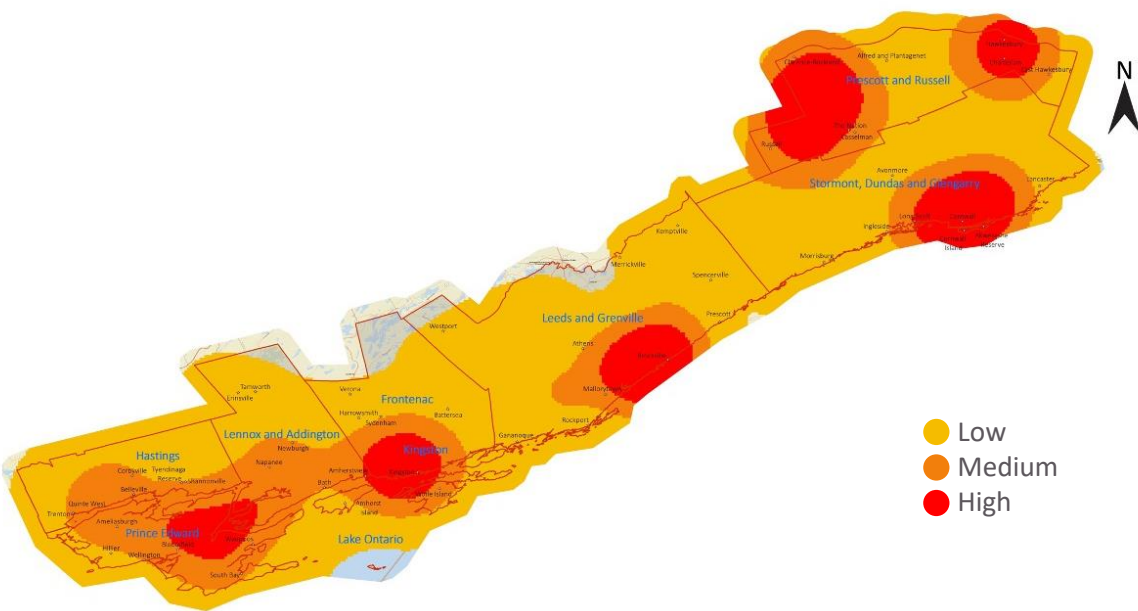
Prescott & Russell (25%) has the most Parks & Trails, however, this tourism asset is fairly consistent throughout the region, with Leeds & Grenville (21%), Stormont, Douglas and Glengarry (19%), and Price Edward Island (10%) contributing towards half the parks and trails in South Eastern Ontario.

- **CLUSTERS:** RT09’s scenic coastline is peppered with parks and trails, with four main clusters found in Prescott & Russell, Prince Edward County, Kingston, Leeds & Grenville and Stormont, Douglas and Glengarry.
- **GAPS:** Despite being in a rural setting with potential for nature-based assets, the northern areas of RT09, including Hastings, Lennox & Addington, Frontenac, Leeds & Grenville and north-western regions of Stormont, Douglas and Glengarry are probably underutilized for parks and trails.

DISTRIBUTION OF PARKS & TRAILS



DENSITY OF PARKS & TRAILS





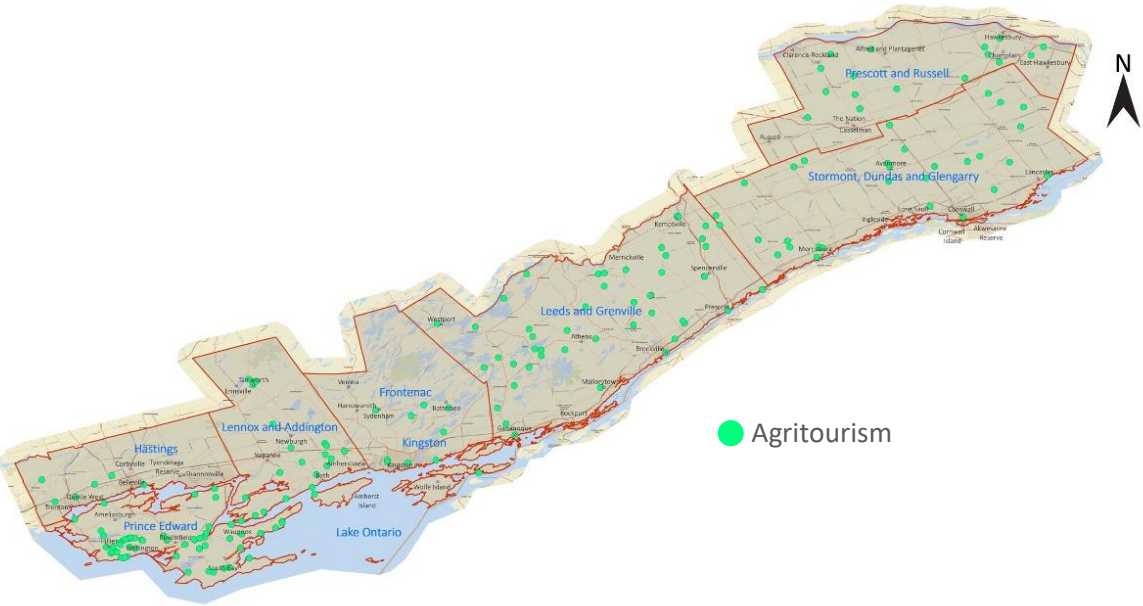
# RTO9 TOURISM ASSETS MAPPING: AGRITOURISM

Agritourism represents 6% of South Eastern Ontario’s tourism assets, with 190 assets.

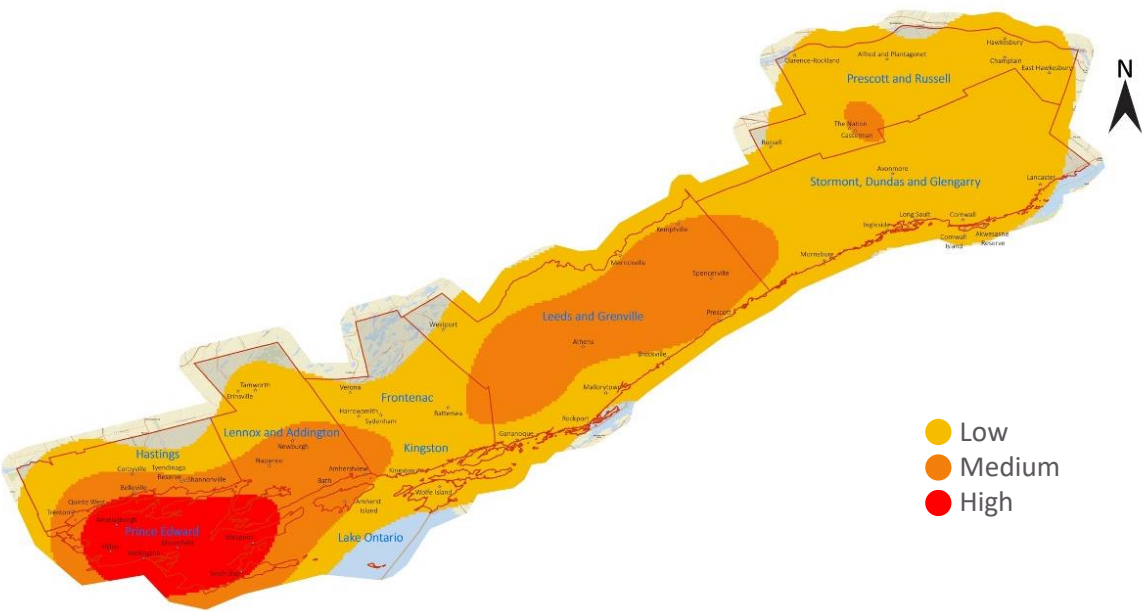
The majority of South East Ontario’s Agritourism assets are located in Prince Edward County (31%), Leeds & Grenville (26%) and Stormont, Douglas and Glengarry (16%), with other rural counties distributing the remaining assets.

- **CLUSTERS:** Agritourism assets are clustered around the Prince Edward county region with a significant number of assets available in central parts of Leeds & Grenville and southern areas of Lennox & Addington.
- **GAPS:** While there are sparse allocations of Agritourism assets in Stormont, Douglas and Glengarry and Prescott & Russell, these regions, along with Frontenac and Kingston is currently underutilized for Agritourism.

DISTRIBUTION OF AGRITOURISM ASSETS



DENSITY OF AGRITOURISM ASSETS



# RTO9 TOURISM ASSETS MAPPING: BEACH / MARINA

Beaches and Marinas represents 3% of South Eastern Ontario’s tourism assets, with 104 assets.

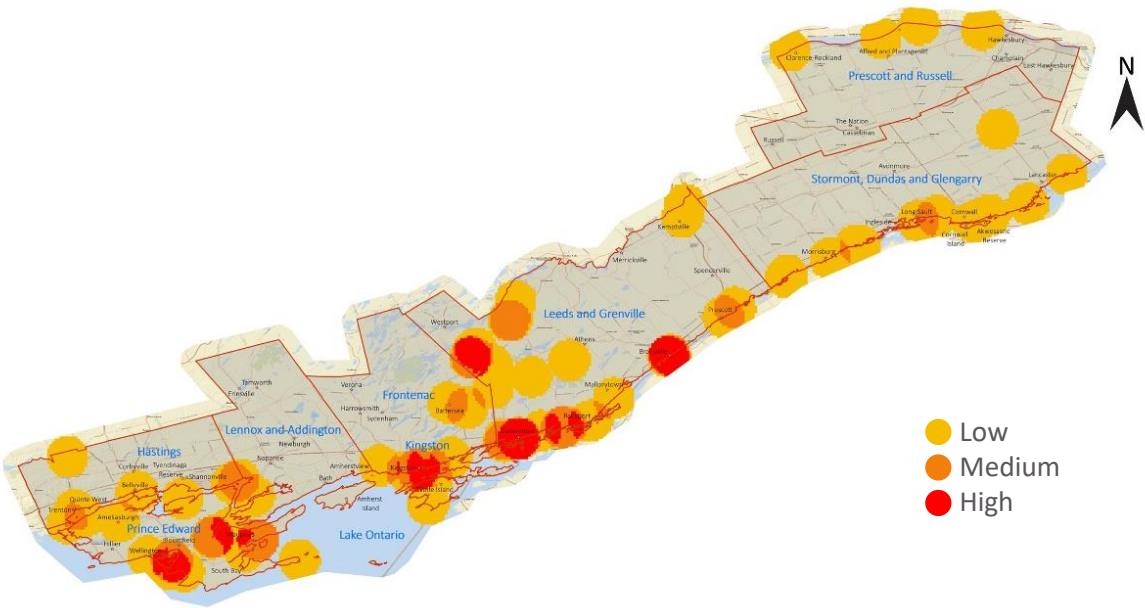
Just under 60% of Beach & Marine assets are situated in Leeds & Grenville (39%) and Prince Edward County (18%).

- **CLUSTERS:** While beaches and marinas are spread across Ontario’s Southwest coastline, main clusters are located in the southern tip of Leeds & Grenville and parts of Kingston.
- **GAPS:** This category does not allow to suggest significant gaps due to the nature of these assets, however, Hastings, Prescott & Russell, and Stormont, Douglas and Glengarry show a lower density compared to other coastal areas.

DISTRIBUTION OF BEACH / MARINA ASSETS



DENSITY OF BEACH / MARINA ASSETS





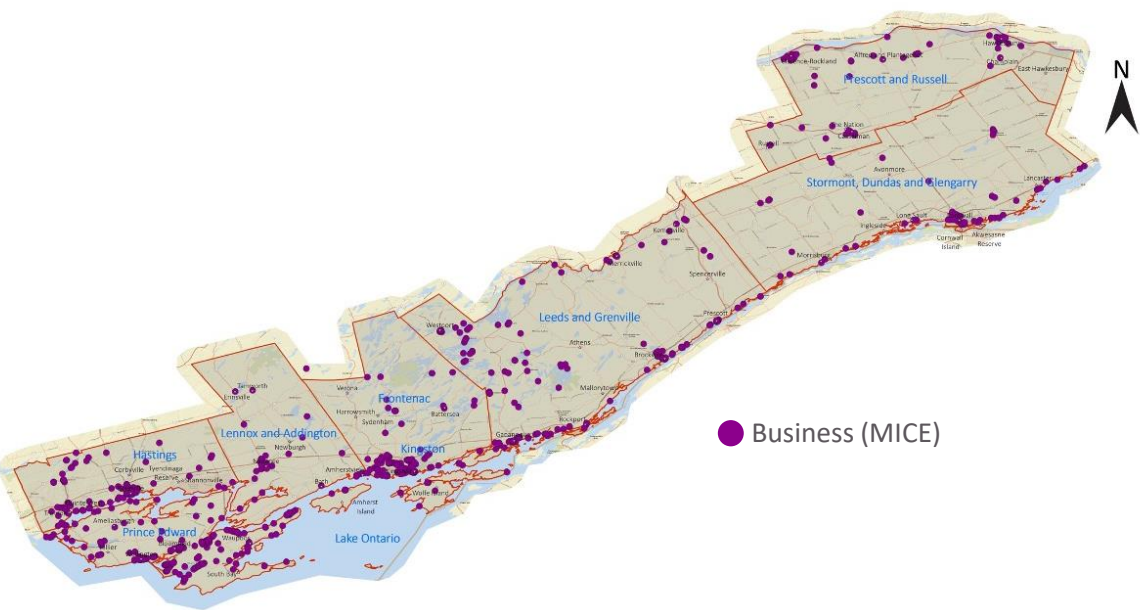
# RTO9 TOURISM ASSETS MAPPING: BUSINESS (MICE)

Business (MICE) represents 27% of South Eastern Ontario’s tourism assets, with 851 assets.

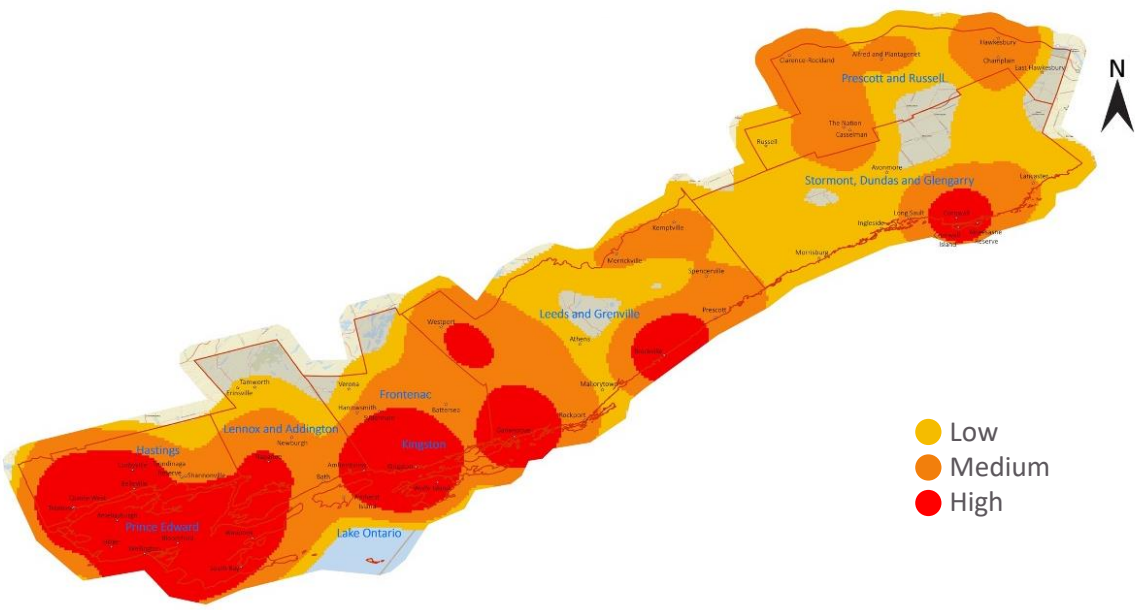
Tourism assets focused on Business (MICE) dominate the South Eastern Ontario region and are mostly located in the Prince Edward County (36%). Leeds & Grenville also has a significant amount of assets catering for this purpose (19%).

- **CLUSTERS:** Prince Edward County and the southern region of Kingston are without a doubt the main business clusters in South Eastern Ontario. However, parts of Lennox & Addington, Leeds & Grenville and Stormont, Douglas and Glengarry have a significant density of business-related tourism assets.
- **GAPS:** Outside of the main clusters, South Eastern Ontario has a limited supply of assets with sufficient readiness to host business travellers or MICE.

DISTRIBUTION OF BUSINESS (MICE) ASSETS



DENSITY OF BUSINESS (MICE) ASSETS



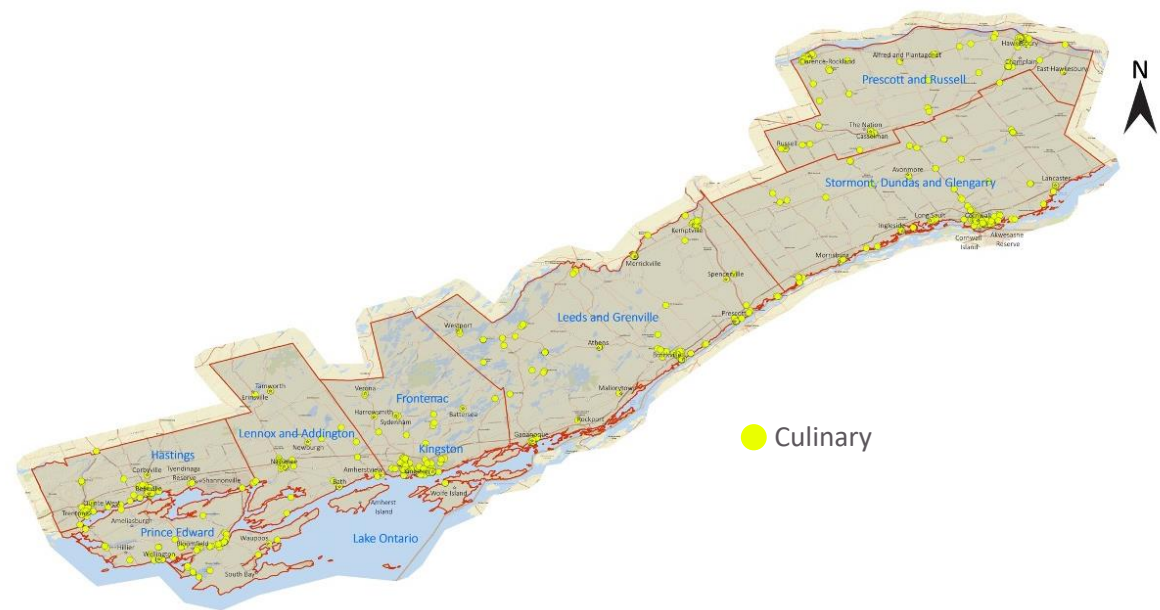
# RTO9 TOURISM ASSETS MAPPING: CULINARY

Culinary represents 27% of South Eastern Ontario’s tourism assets, with 851 assets.

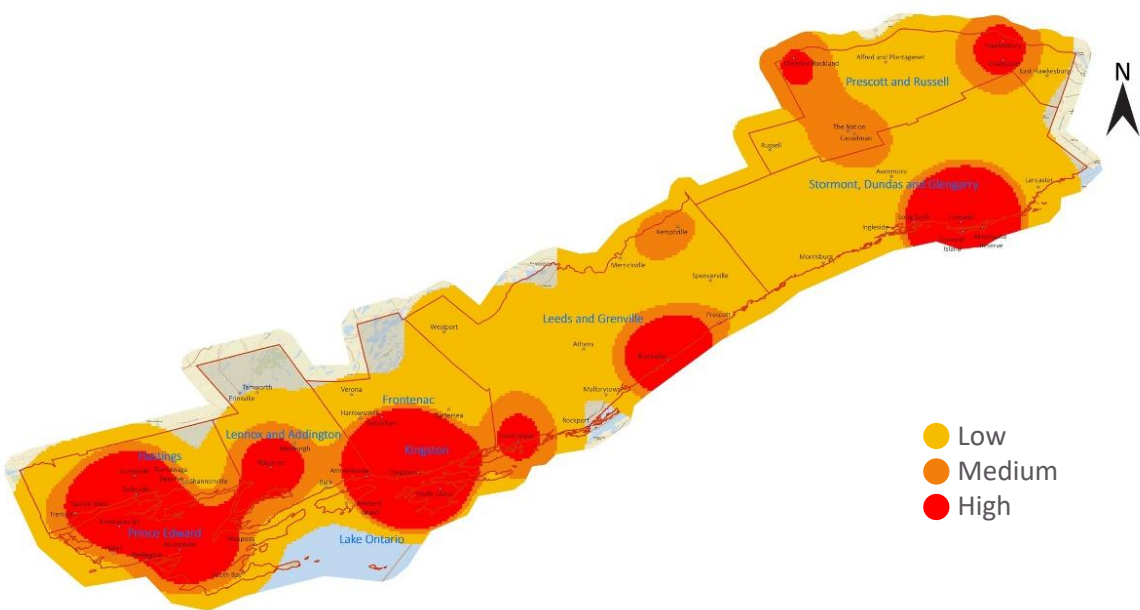
When it comes to Culinary options, the urban areas of Kingston (23%), Leeds & Grenville (20%) and Stormont, Douglas and Glengarry (17%) again capture the larger portion of tourism assets, while the counties of Lennox & Addington (7%) and Frontenac (2%) have a limited culinary offering.

- **CLUSTERS:** South Eastern Ontario is itself a culinary hotspot, and while the largest clusters are in Prince Edward County, Hastings and Kingston, Culinary assets are spread around the region, with Leeds & Grenville, Prescott & Russell and Stormont, Douglas and Glengarry concentrating a high density of these.
- **GAPS:** Northern regions of Lennox & Addington, Frontenac, Leeds & Grenville and Stormont, Douglas and Glengarry host a lower number of visitor-ready Culinary assets.

DISTRIBUTION OF CULINARY ASSETS



DENSITY OF CULINARY ASSETS



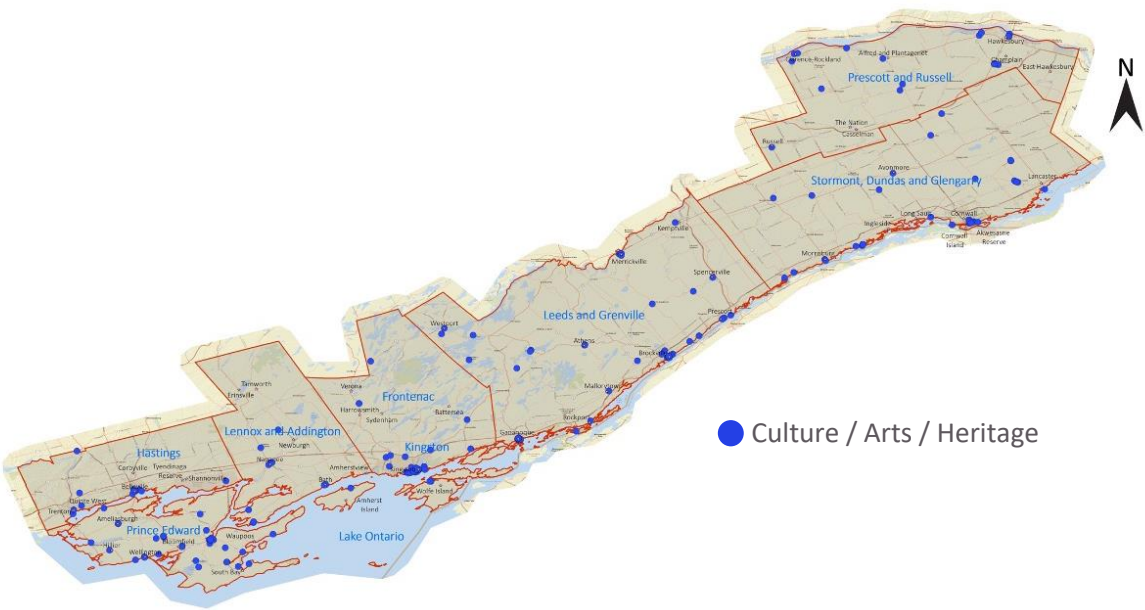
# RTO9 TOURISM ASSETS MAPPING: CULTURE / ARTS / HERITAGE

Culture/ Arts/ Heritage represents 7% of South Eastern Ontario’s tourism assets, with 227 assets.

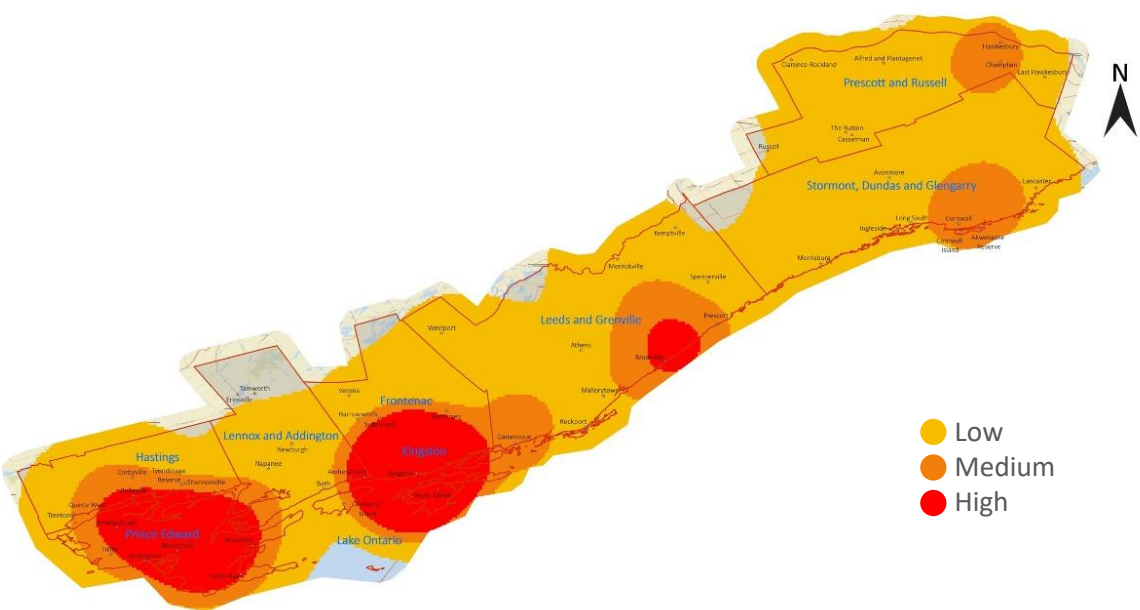
Culture, Arts and Heritage assets are relatively spread across Leeds & Grenville (25%), Kingston (18%), Prince Edward County (17%) and Stormont, Douglas and Glengarry (15%).

- **CLUSTERS:** Prince Edward County, Kingston and Leeds & Grenville near Brockville, are the cultural hotspots in South Eastern Ontario, while the rest of the region has a significant presence of culture, arts, and heritage assets but without creating specific clusters.
- **GAPS:** Areas in Lennox & Addington, Frontenac and most parts of Stormont, Douglas and Glengarry and Prescott & Russell have a limited number of cultural assets.

DISTRIBUTION OF CULTURE / ARTS / HERITAGE ASSETS



DENSITY OF CULTURE / ARTS / HERITAGE ASSETS





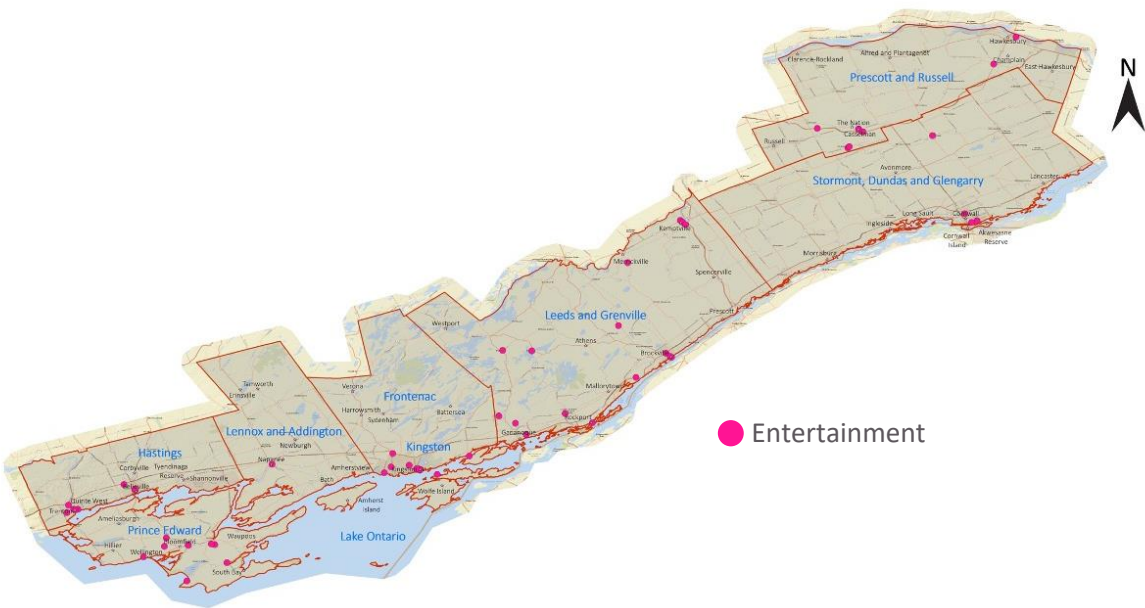
# RTO9 TOURISM ASSETS MAPPING: ENTERTAINMENT

Entertainment represents 2% of South Eastern Ontario’s tourism assets, with 58 assets.

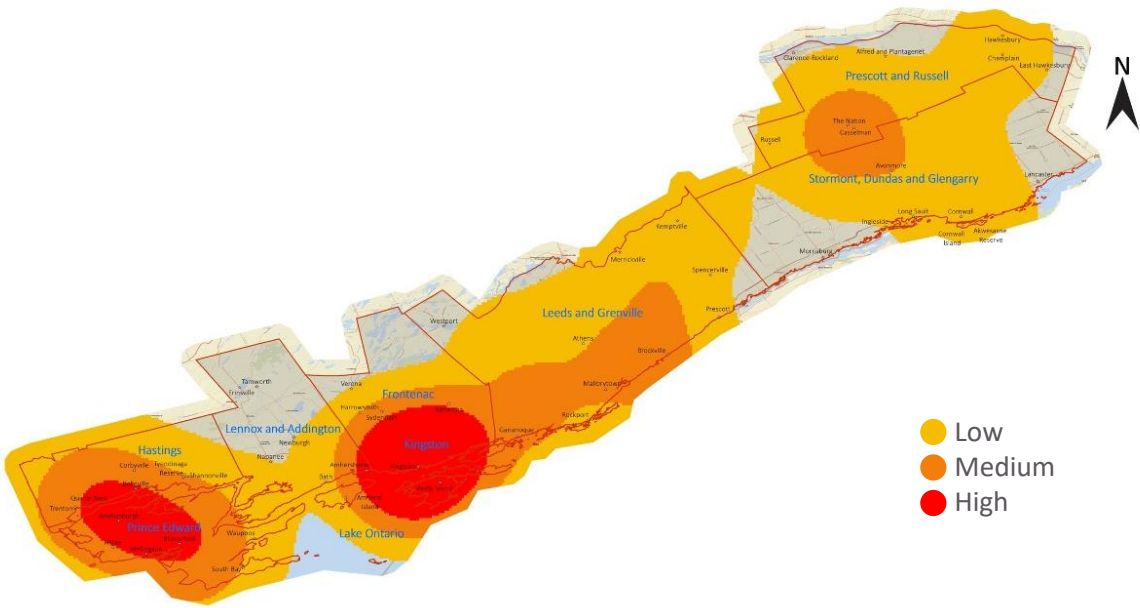
Half of South East Ontario’s Entertainment offering is located in Leeds & Grenville (34%), Kingston (22%), with Hastings (16%) and Prince Edward County (16%) offering relatively sizeable assets. Entertainment assets in South East Ontario remain relatively low overall.

- **CLUSTERS:** The urban areas of Prince Edward County and Kingston capitalize most of the entertainment offering, with the remaining options mostly being located in main towns in the different counties, such as Hastings, Leeds & Grenville, Prescott & Russell, and Stormont, Douglas and Glengarry.
- **GAPS:** Most areas with lower population lack a robust entertainment offering focused on visitors.

DISTRIBUTION OF ENTERTAINMENT ASSETS



DENSITY OF ENTERTAINMENT ASSETS



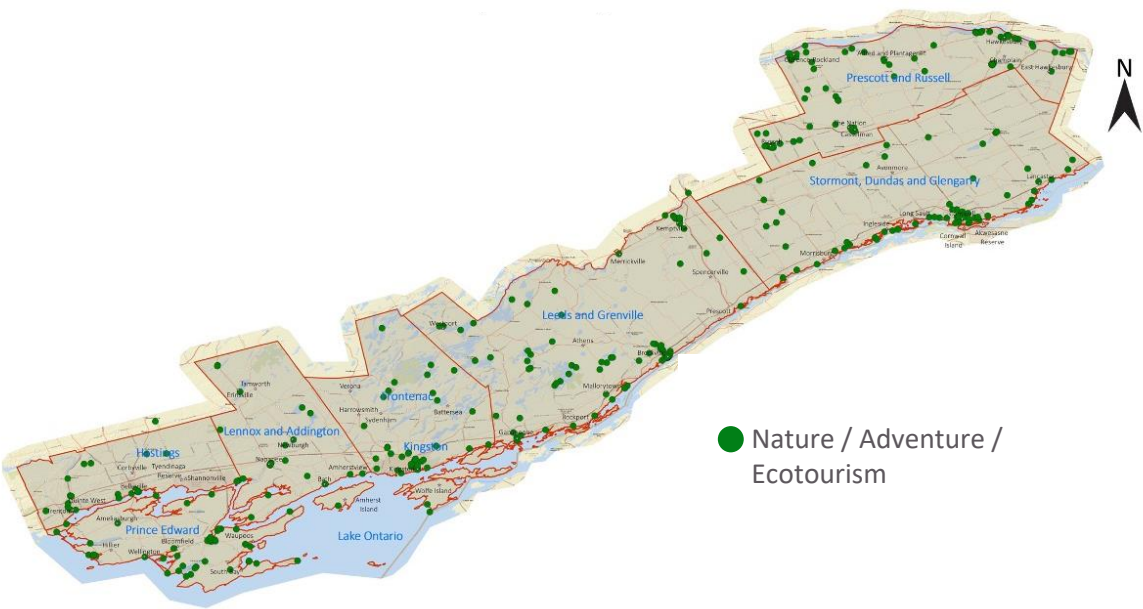
# RTO9 TOURISM ASSETS MAPPING: NATURE / ADVENTURE / ECOTOURISM

Nature / Adventure / Ecotourism represents 11% of South Eastern Ontario's tourism assets, with 364 assets.

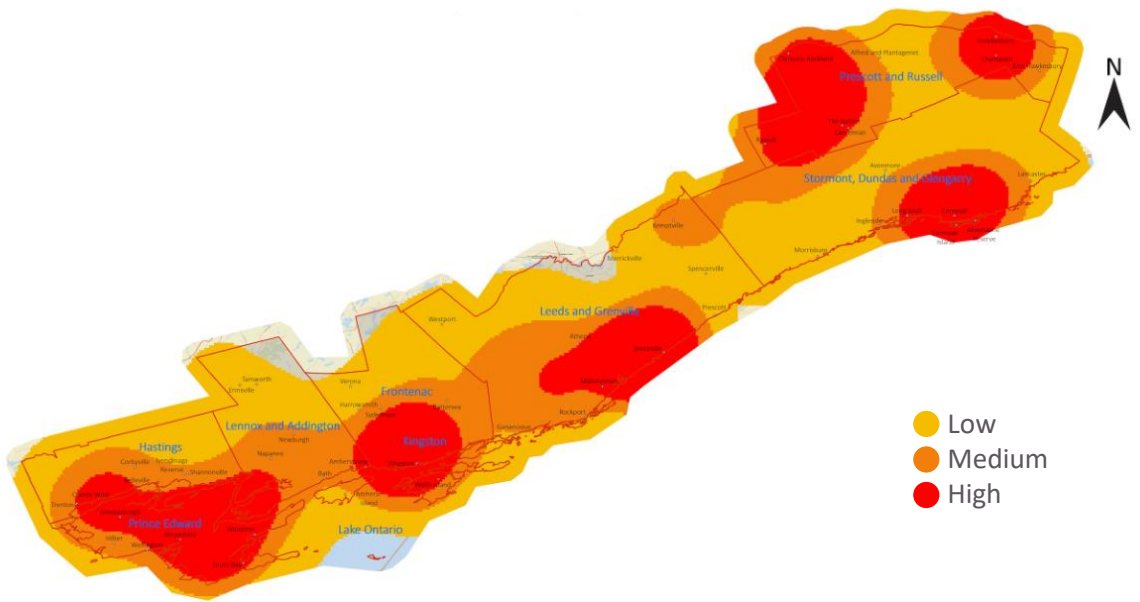
Leeds & Grenville (23%) and Prescott & Russell (22%) make up just under half of Nature/Adventure/Ecotourism assets within RTO9, followed by Stormont, Douglas and Glengarry (17%) and Prince Edward County (12%).

- **CLUSTERS:** There are seven key clusters for nature-based tourism: from Hastings to Prince Edward County, moving into Kingston, Leeds & Grenville, east and west of Prescott & Russell, and along the coast of Stormont, Douglas and Glengarry. However, the supply of outdoor recreation assets in South Eastern Ontario is healthy and provides the foundation to one of its key differentiators.
- **GAPS:** Only the northern regions of Lennox & Addington, parts of Leeds & Grenville and western areas of Stormont, Douglas and Glengarry seem to be underutilized and could benefit from increasing its nature, adventure, and ecotourism assets.

DISTRIBUTION OF NATURE / ADVENTURE / ECOTOURISM ASSETS



DENSITY OF NATURE / ADVENTURE / ECOTOURISM ASSETS



# RTO9 TOURISM ASSETS MAPPING: SHOPPING / RETAIL

Shopping / Retail represents 9% of South Eastern Ontario's tourism assets, with 273 assets.

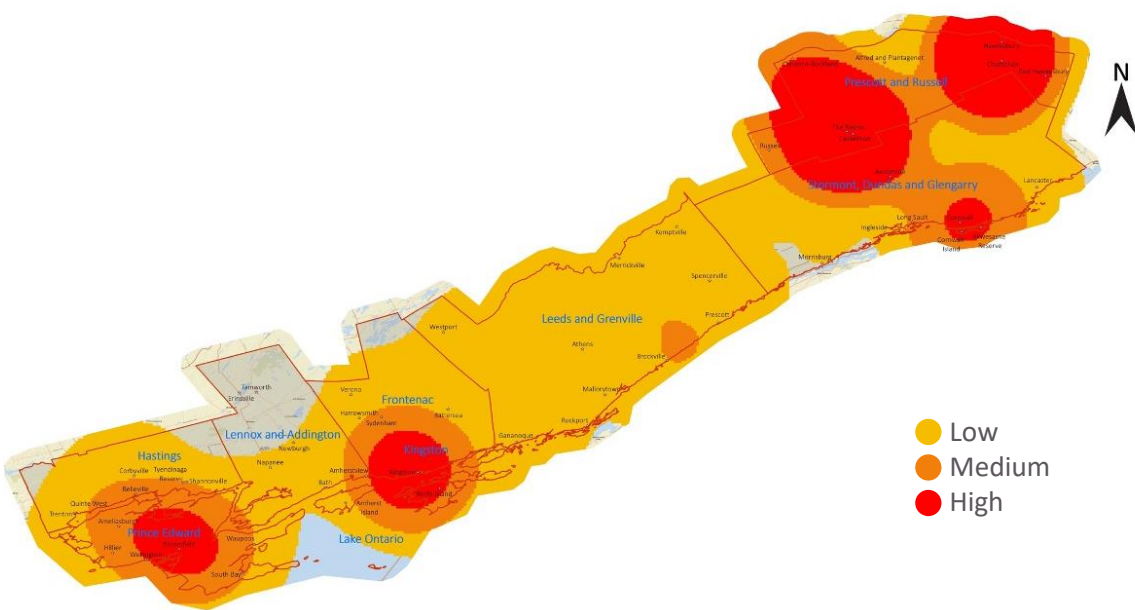
Prescott & Russell (43%) is the hub for Shopping & Retail assets. The rest of the assets are relatively spread across Leeds & Grenville (14%), Prince Edward County (12%), Stormont, Douglas and Glengarry (11%) and Kingston (10%).

- **CLUSTERS:** Shopping and retail clusters are clearly defined in urban areas: Prescott & Russell, Prince Edward County, Kingston and Stormont, Douglas and Glengarry. The most major clusters are located within Prescott & Russell.
- **GAPS:** There is a potential opportunity to incentivize the dispersion of shopping and retail assets with a focus on tourism across the rest of the region.

DISTRIBUTION OF SHOPPING / RETAIL ASSETS



DENSITY OF SHOPPING / RETAIL ASSETS





# RTO9 TOURISM ASSETS MAPPING: SPORTS

Sports represents 5% of South Eastern Ontario’s tourism assets, with 151 assets.

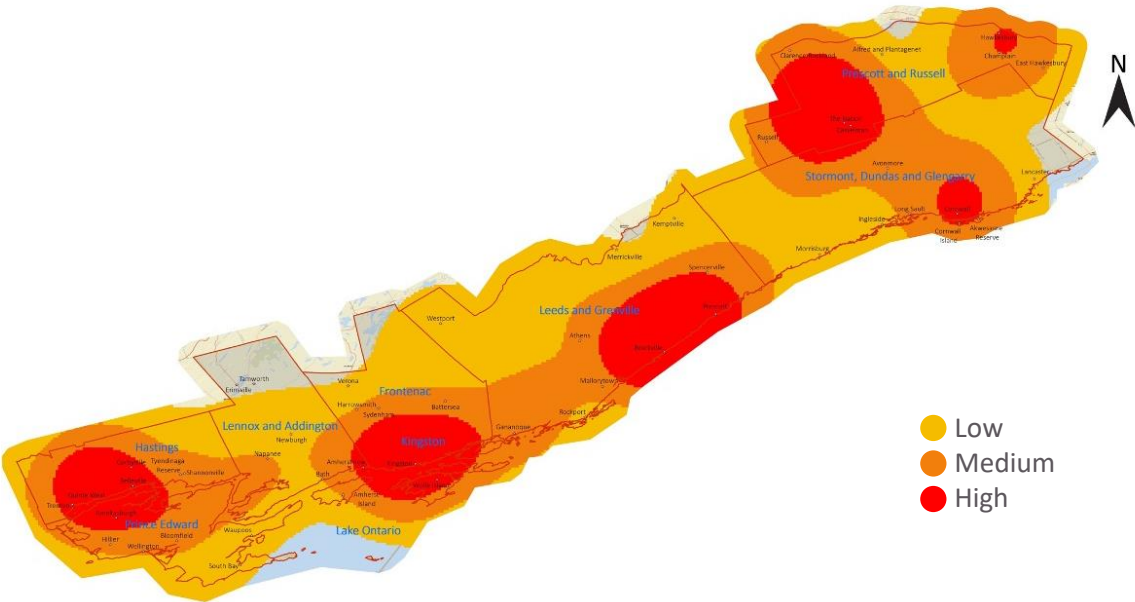
Leeds & Grenville hosts the largest number of Sports assets (28%), followed closely by Prescott & Russell (24%) . The rest of the assets are relatively spread across Stormont, Douglas and Glengarry (13%), Hastings (13%) and Kingston (9%).

- **CLUSTERS:** Four six clusters and their surrounding areas are rich with sporting assets in South Eastern Ontario, including hotspots in Prescott & Russell, Hastings, Kingston, Leeds & Grenville and Stormont, Douglas and Glengarry.
- **GAPS:** Northern regions of Hastings, Lennox & Addington, Frontenac and Stormont, Douglas and Glengarry lack tourism assets .

DISTRIBUTION OF SPORTS ASSETS



DENSITY OF SPORTS ASSETS



# RTO9 TOURISM ASSETS MAPPING: WELLNESS

Wellness represents 1% of South Eastern Ontario’s tourism assets, with 19 assets.

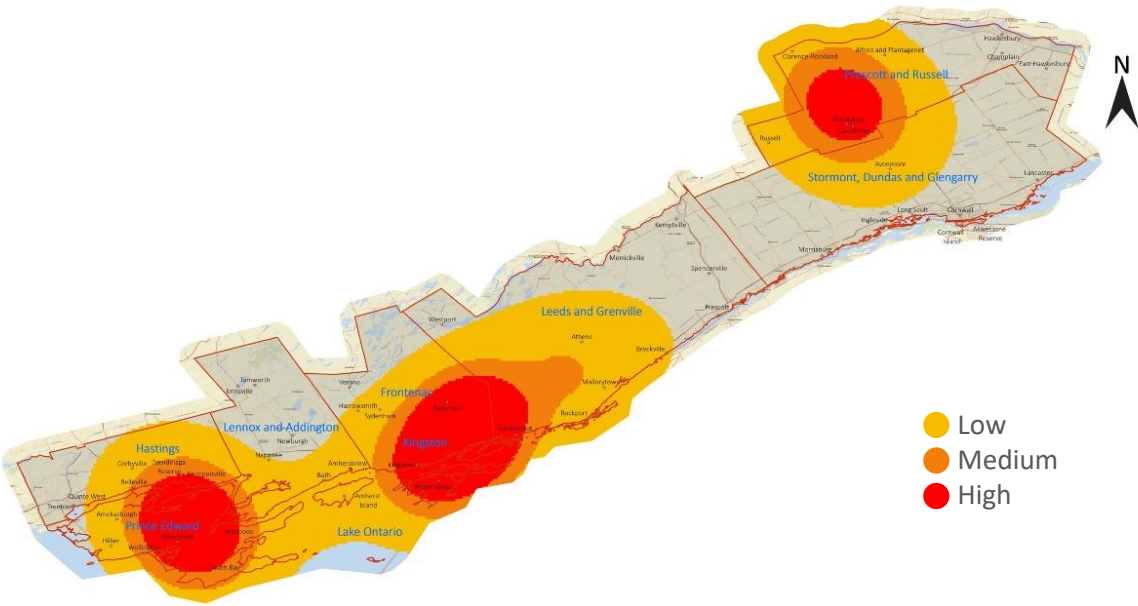
Offerings related to Wellness are generally not well-represented in South Eastern Ontario, posing an opportunity for the region. Lennox & Addington (32%), Leeds & Grenville (16%), and Prescott & Russell (16%) are the highest contributing counties.

- **CLUSTERS:** The number of assets is limited, overall with relatively small clusters visible in Prince Edward County, Kingston, and Prescott & Russell.
- **GAPS:** Given that Wellness is an emerging tourism trend, there is a clear opportunity to improve the offering across South Eastern Ontario.

DISTRIBUTION OF WELLNESS ASSETS



DENSITY OF WELLNESS ASSETS



# HASTINGS TOURISM ASSET MAPPING

## TOURISM VERTICAL OVERVIEW

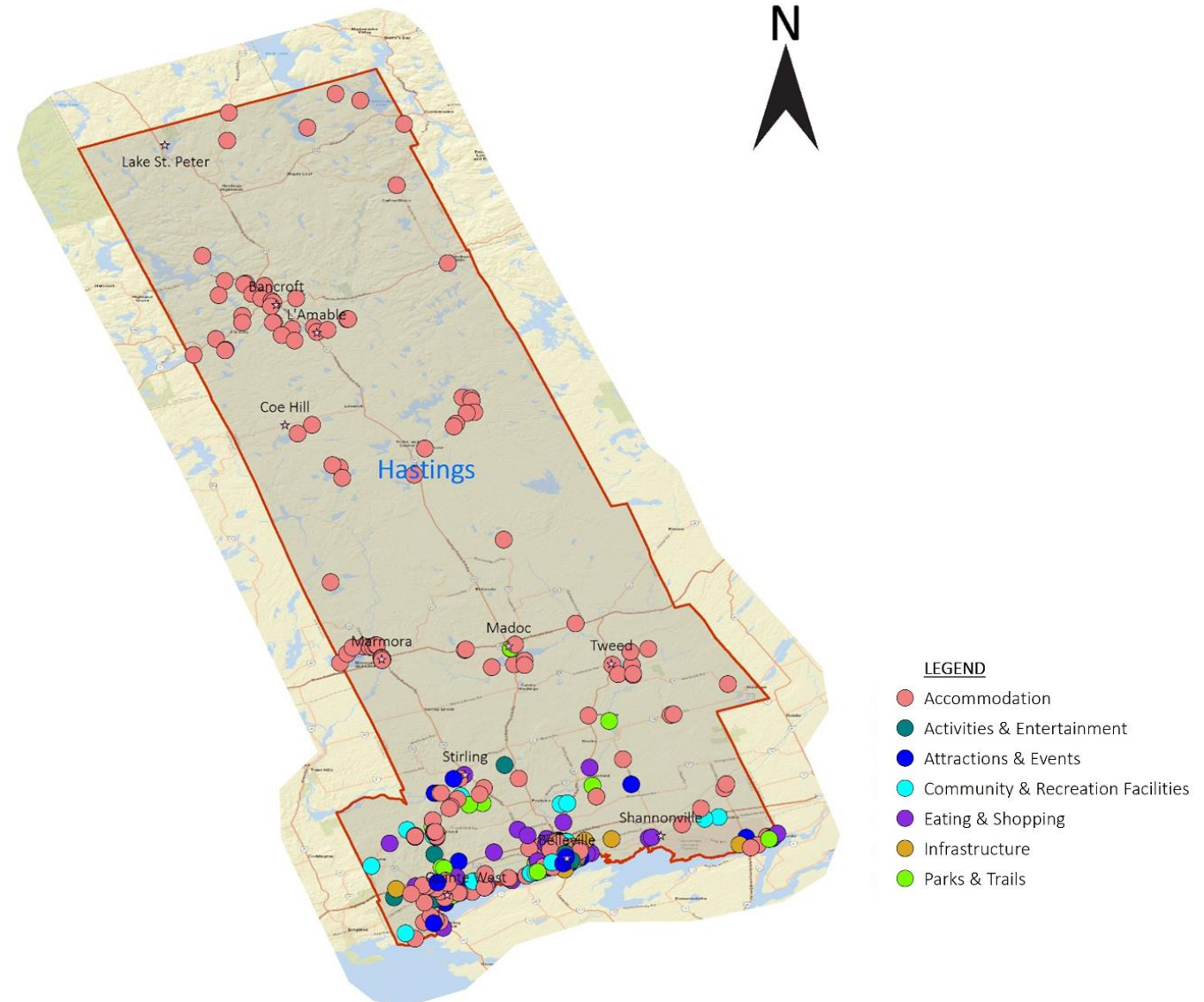
Just over half (52%) of all Hastings tourism assets are located within the RT09 region, with 100% of tourism assets in Infrastructure; and the majority of its Community & Recreation Facilities (84%) and Parks & Trails (66%) being located within RT09.

Tourism assets are relatively spread across the southern end of the Hastings region, with Accommodation dispersed throughout.

Eating and Shopping tourism assets are the highest contributing in the RT09 region (39%), followed by Accommodation (31%).

Parks and Trails, Community & Recreation Facilities, Attractions & Events, Activities & Entertainment and Infrastructure make up a marginal contribution to the tourism asset supply, with high concentration within the southern region of Hastings.

## DISTRIBUTION OF TOURISM ASSETS BY VERTICAL





# HASTINGS TOURISM ASSET MAPPING

## TOURISM THEME OVERVIEW

Hastings' Accommodation offering is closely matched to its prominent Business (MICE) tourism asset locations, which make up a third of its tourism assets by theme (33%). Half of these assets (49%) are located within the RTO9 region.

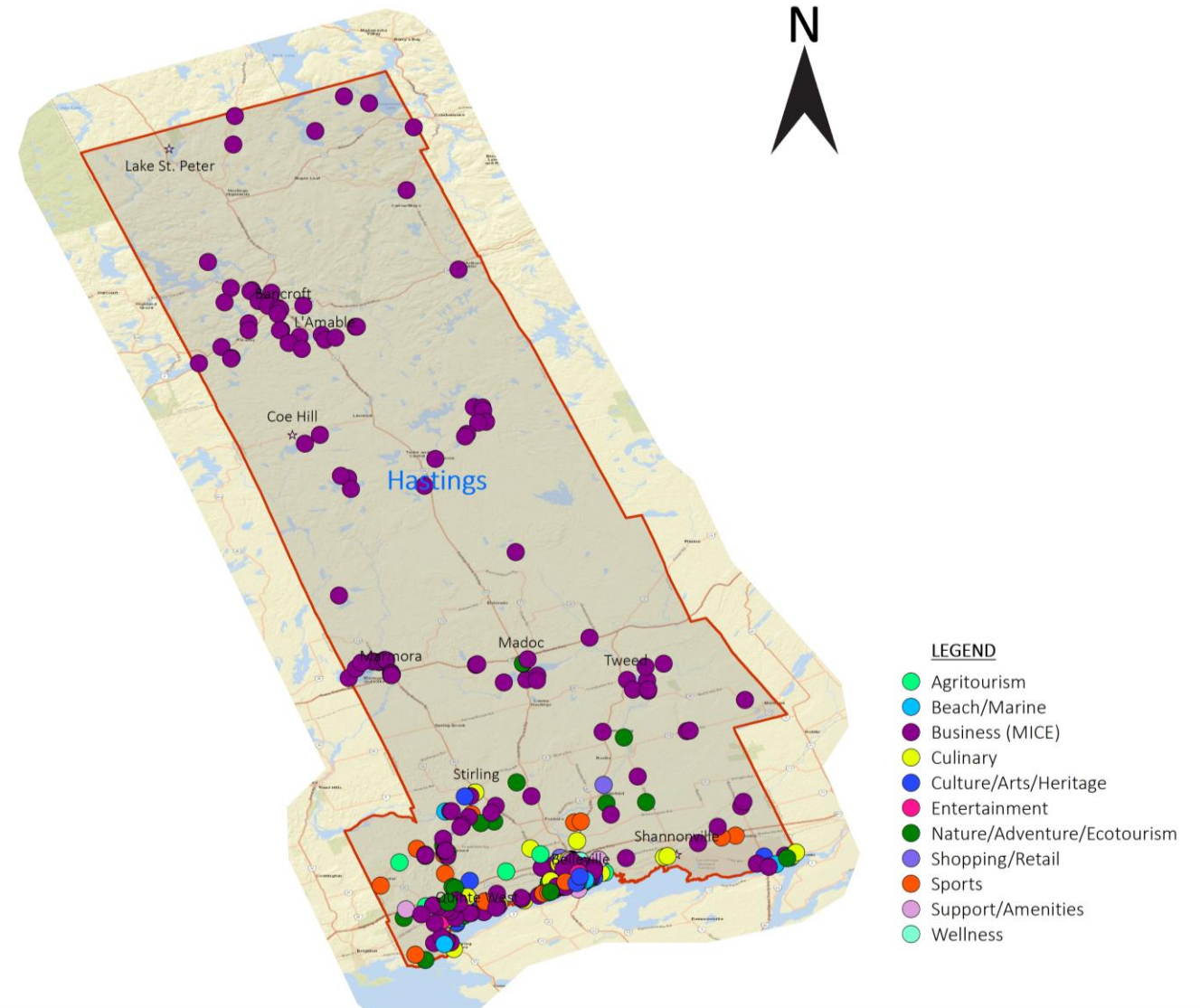
Hastings County has more than 80% of its Beach/Marine (89%), Sports (83%) and Entertainment (80%) tourism assets located within the RTO9 region.

While well-catered to in terms of accommodation, similar to its thematic view, the southern region of Hastings is highly dense with Culinary assets (33%) and Nature, Adventure and Ecotourism offerings (10%).

Sports, Culture, Arts & Heritage, Agritourism, Beach & Marine, Entertainment and Shopping & Retail are much smaller by comparison but make up the rest of Hastings tourism offering.

Support & Amenities and Wellness offerings are underutilized in the area.

## DISTRIBUTION OF TOURISM ASSETS BY THEME



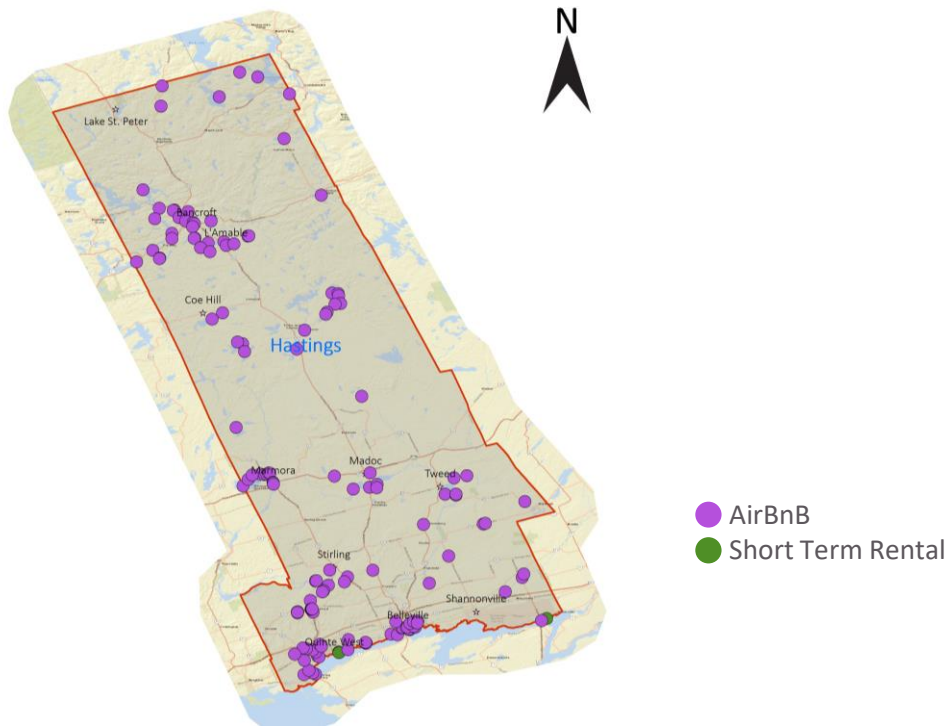
# HASTINGS TOURISM ASSETS MAPPING: AIRBNB & SHORT TERM RENTAL

AirBnB and Short Term Rentals represents 23% of Hastings’ tourism assets, with 66 assets.

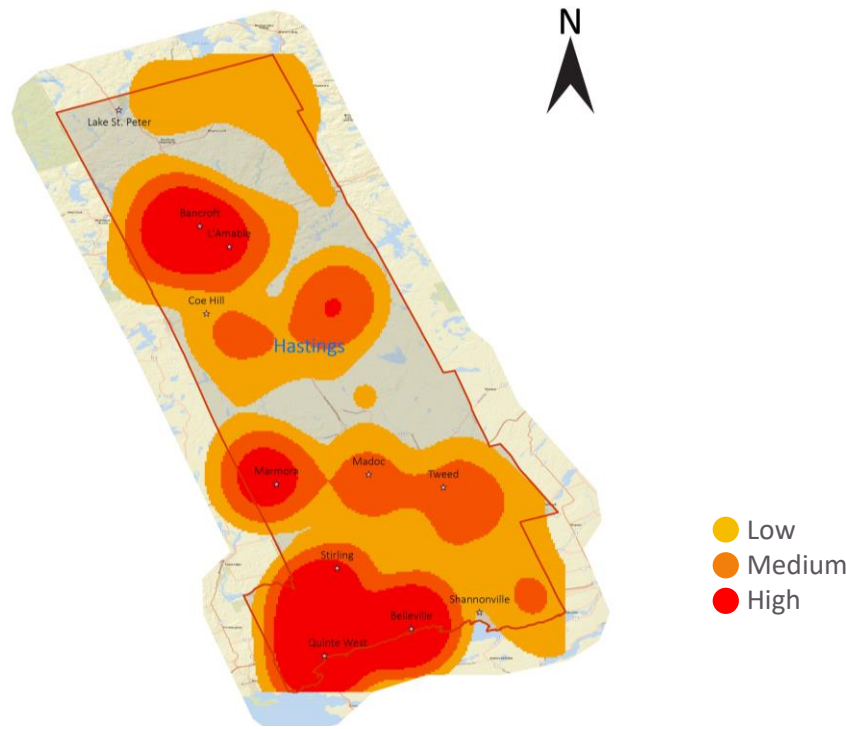
AirBnB and Short Term Rentals together represent 74% of Hastings’ Accommodation assets, with the majority being AirBnB style accommodation dispersed across the county.

- **CLUSTERS:** Three main clusters exist near the southern (Quinte West, Belleville, Stirling and Marmora) and upper (Bancroft and L’Amable) regions of Hastings, with a smaller cluster forming in the mid-region.
- **GAPS:** This assessment demonstrates the lack of accommodation in some regions around the main clusters mentioned above.

DISTRIBUTION OF AIRBNB/SHORT TERM RENTAL ASSETS



DENSITY OF AIRBNB/SHORT TERM RENTAL ASSETS



# LENNOX & ADDINGTON TOURISM ASSET MAPPING

## TOURISM VERTICAL OVERVIEW

Tourism assets are relatively spread across Lennox & Addington, with a significant share of the total supply located in the southern region of the county.

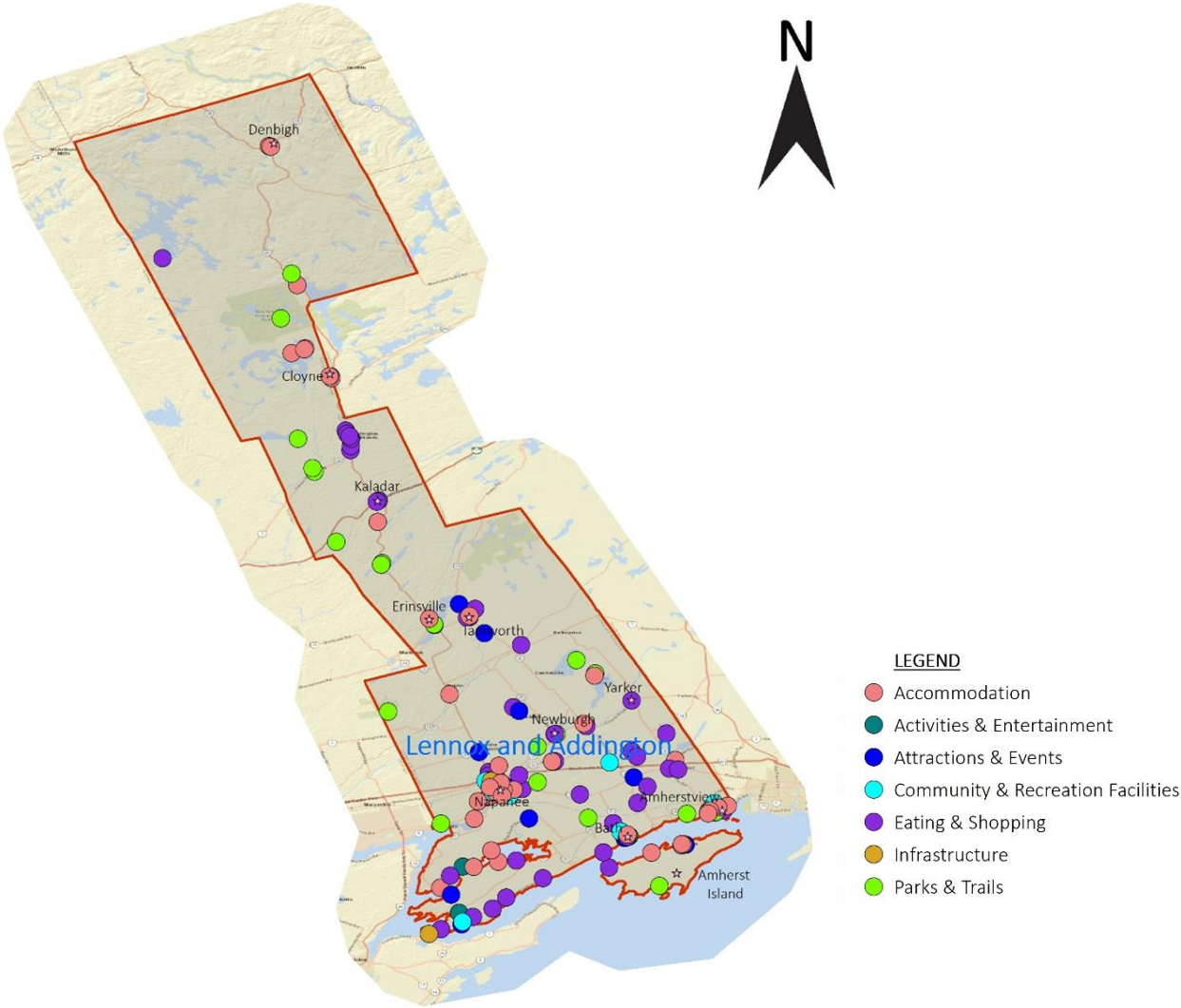
Lennox & Addington has 84% of its tourism assets within RT09 with all Activities & Entertainment, Community & Recreation Facilities and Infrastructure assets belonging to the region.

Eating & Shopping represent the majority of Lennox & Addington’s tourism assets (46%) and mimic the county’s Business (MICE) and Culinary hotspots within RT09.

More than half of Lennox & Addington’s tourism assets are related to Accommodation and Parks & Trails, followed by Attractions & Events, while Community & Recreation Facilities, Activities & Entertainment and Infrastructure represent a small fraction of the supply.

While a high concentration of assets is visible on the coastal region, inland areas in Tamworth, Erinsville, Kaladat, Cloyne and Denbigh seem underutilized.

## DISTRIBUTION OF TOURISM ASSETS BY VERTICAL





# LENNOX & ADDINGTON TOURISM ASSET MAPPING

## TOURISM THEME OVERVIEW

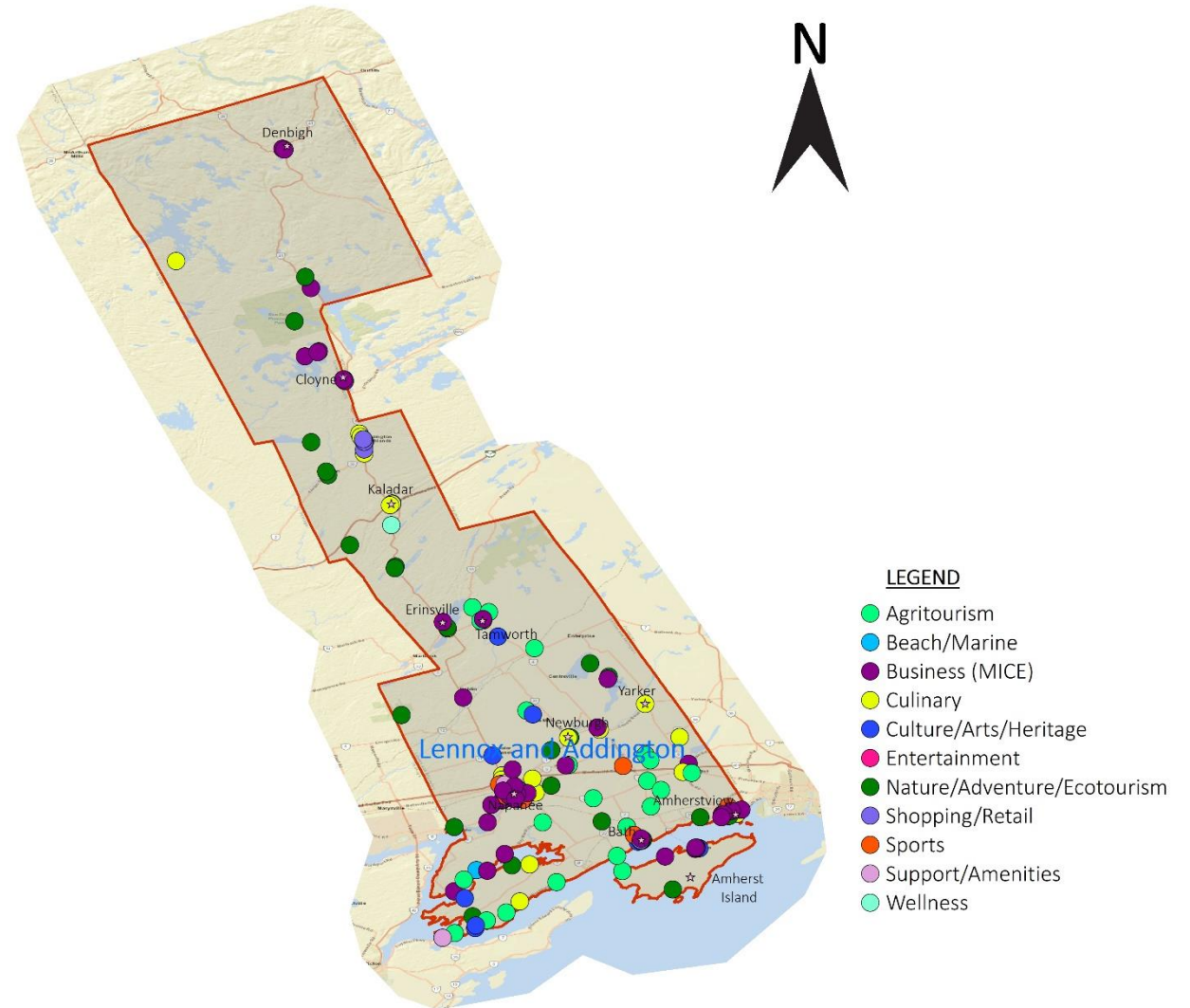
Lennox & Addington has, on average, 84% of all other tourism assets located within the RT09 region.

More than half of Lennox & Addington's tourism assets are within the Culinary (31%) and Business (MICE) spheres (21%), which are largely clustered in the southern region of the county.

Nature/Adventure/Ecotourism (15%) and Agritourism (10%) make up a significant proportion of the offering and while the former is interspersed throughout the county in both urban and rural areas, the latter is predominantly found in the bottom half of the county.

Culture/Arts/Heritage, Sport and Shopping and Retail assets are located in more urban areas with a few Culinary offerings overlayed in areas where Eating and Shopping are prominent.

## DISTRIBUTION OF TOURISM ASSETS BY THEME



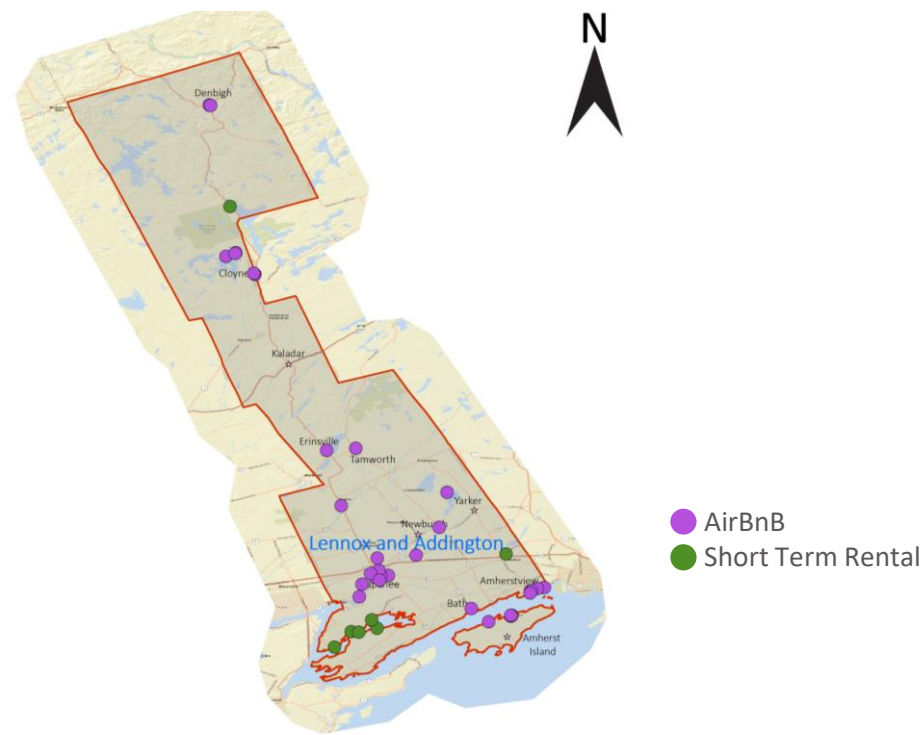
# LENNOX & ADDINGTON TOURISM ASSETS MAPPING: AIRBNB & SHORT TERM RENTAL

AirBnB and Short Term Rentals represents 19% of Lennox & Addington’s tourism assets within RTO9, with 36 assets.

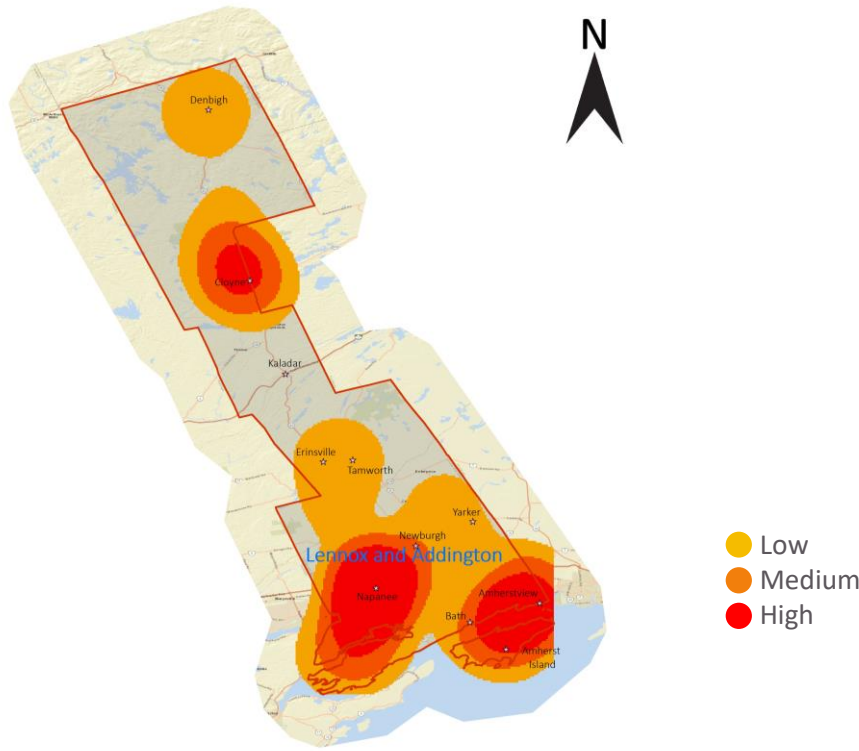
AirBnB and Short Term Rentals together represent 92% of Lennox & Addington’s Accommodation assets within RTO9, with the majority being AirBnB style accommodation (72%). Lennox & Addington has a limited offering of this accommodation type throughout the county.

- **CLUSTERS:** Three main clusters exist, two being on either corners of the southern region of Lennox & Addington and a small cluster towards the north, near Cloyne.
- **GAPS:** Lennox & Addington is generally sparsely populated with AirBnB and Short Term Rentals, with no options available in the regions surrounding the main clusters mentioned above.

DISTRIBUTION OF AIRBNB/SHORT TERM RENTAL ASSETS



DENSITY OF AIRBNB/SHORT TERM RENTAL ASSETS



# FRONTENAC TOURISM ASSET MAPPING

## TOURISM VERTICAL OVERVIEW

Frontenac has just over a third of its total tourism assets (36%) located within RT09 with the majority of its Parks & Trails (85%) Activities & Entertainment (77%), Accommodation (70%) assets outside of the RT09 region. However, the majority of Infrastructure (75%), Community & Recreation Facilities (60%), Eating & Shopping (58%) and Attractions & Events (56%) are within the RTO9 region.

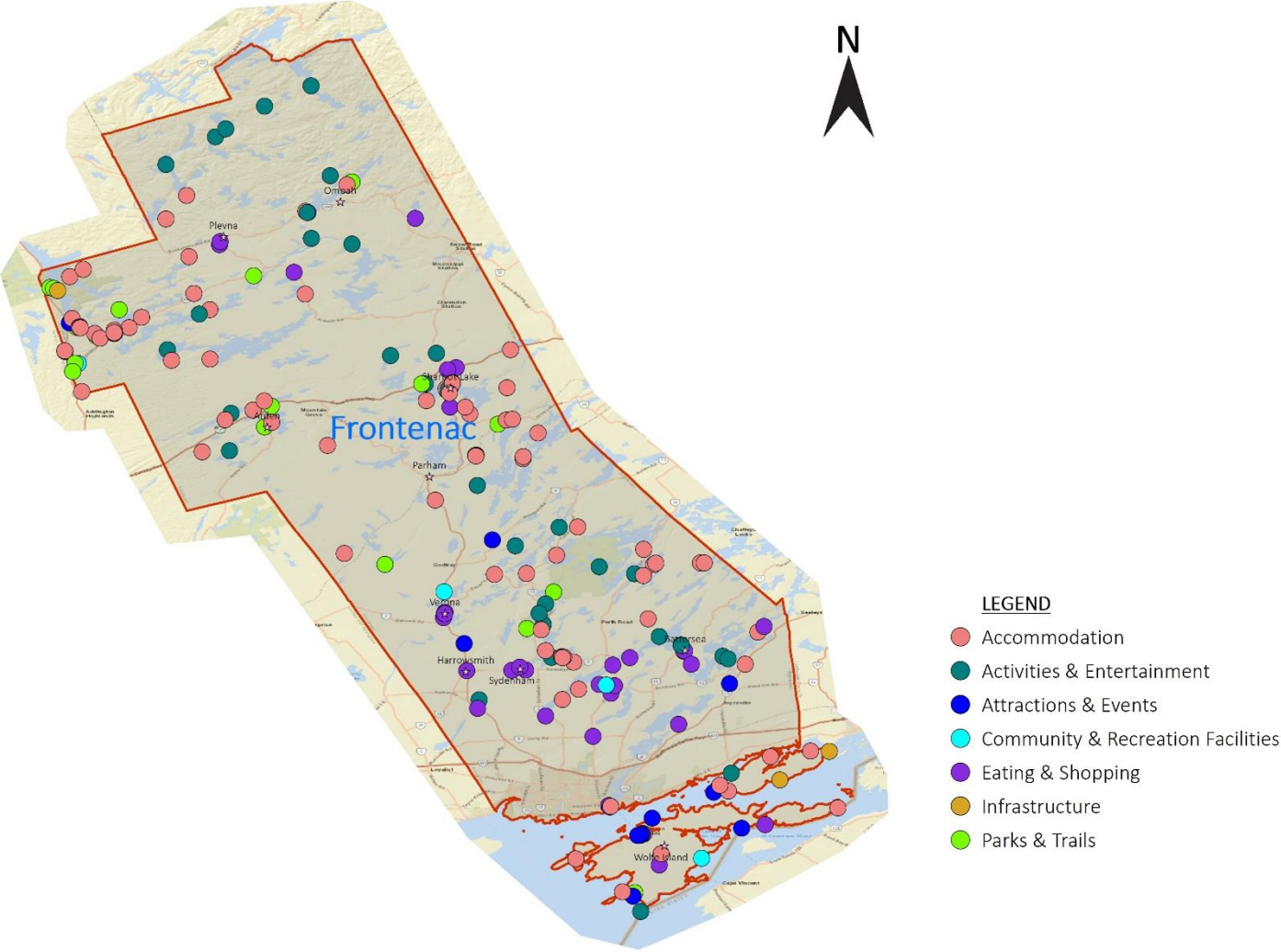
The county has a relatively spread asset allocation across the county with Accommodation assets (36%) available widely in various regions and closely linked to the Business (MICE) tourism offerings.

Eating & Shopping and Activities & Entertainment make up a third (32%) of tourism assets with clusters in the more urban southern and coastal regions of the county.

A significant portion (13%) belong to Activities & Entertainment assets which tend to fill in the more remote locations of the county.

Parks and Trails, Community & Recreation Facilities and Infrastructure make up the rest of tourism assets for Frontenac.

## DISTRIBUTION OF TOURISM ASSETS BY VERTICAL





# FRONTENAC TOURISM ASSET MAPPING

## TOURISM THEME OVERVIEW

Even though Frontenac ranks low in most tourism theme categories, due to only having 36% of its tourism assets within RT09, the county is largely well-rounded with a variety of assets across themes, barring Wellness offerings (1%). Most of its assets in Culture/Arts/Heritage (78%), Sports (75%) and Support/Amenities (75%) are located in RT09.

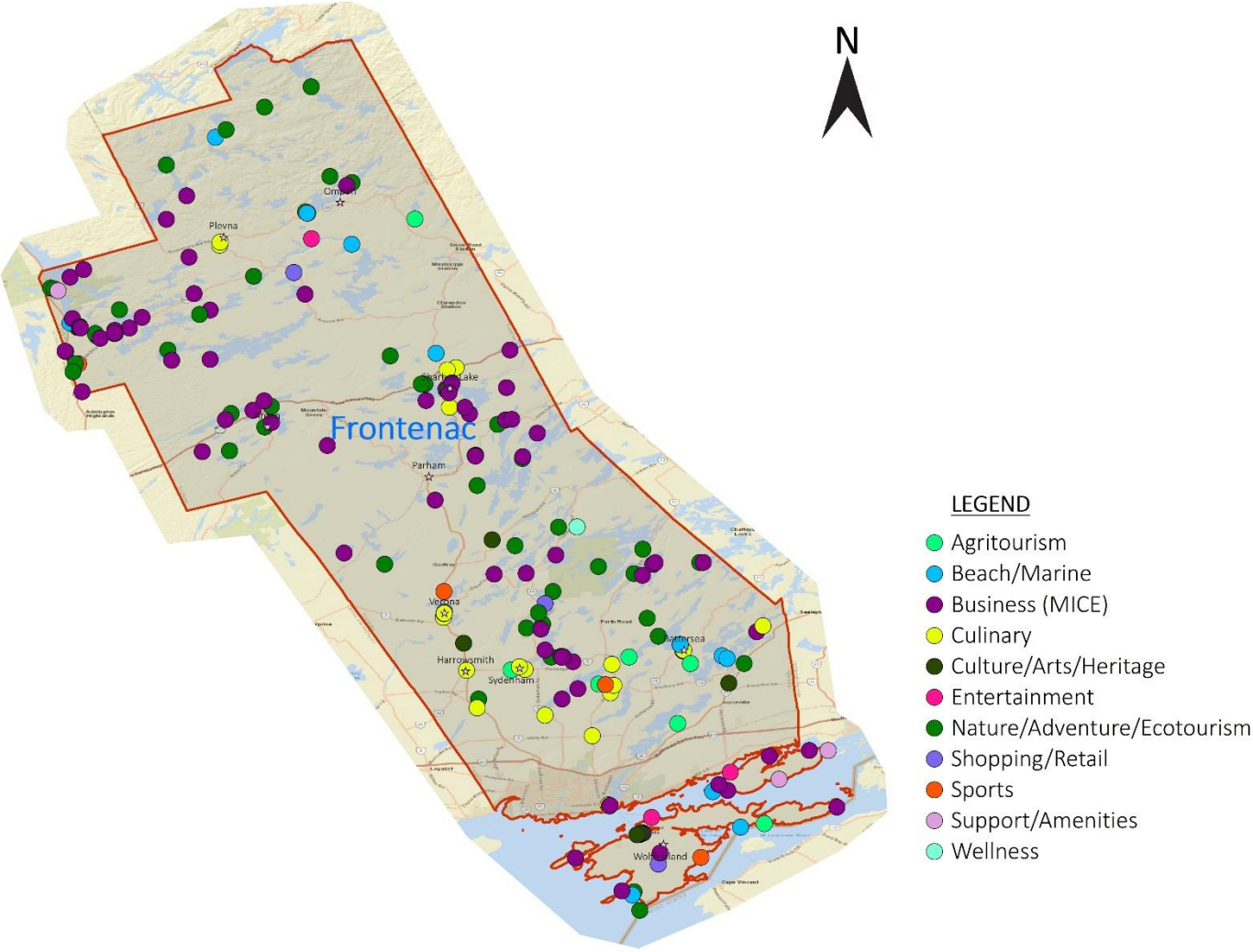
The county’s Business (MICE) offering features prominently throughout the region, making up 31% of the total tourism assets for Frontenac, with clusters evident in the west, east, southern inland and southern coastal regions.

Frontenac also has a decent culinary offering (21%) with an underutilization of these assets near the county’s Business (MICE) hubs.

Nature/Adventure/Ecotourism represent a significant share (14%) of tourism assets for Frontenac and can be found near Business (MICE) areas as well as more remote locations.

The county is underrepresented by Wellness offerings with only one asset available within the RTO9 region.

## DISTRIBUTION OF TOURISM ASSETS BY THEME



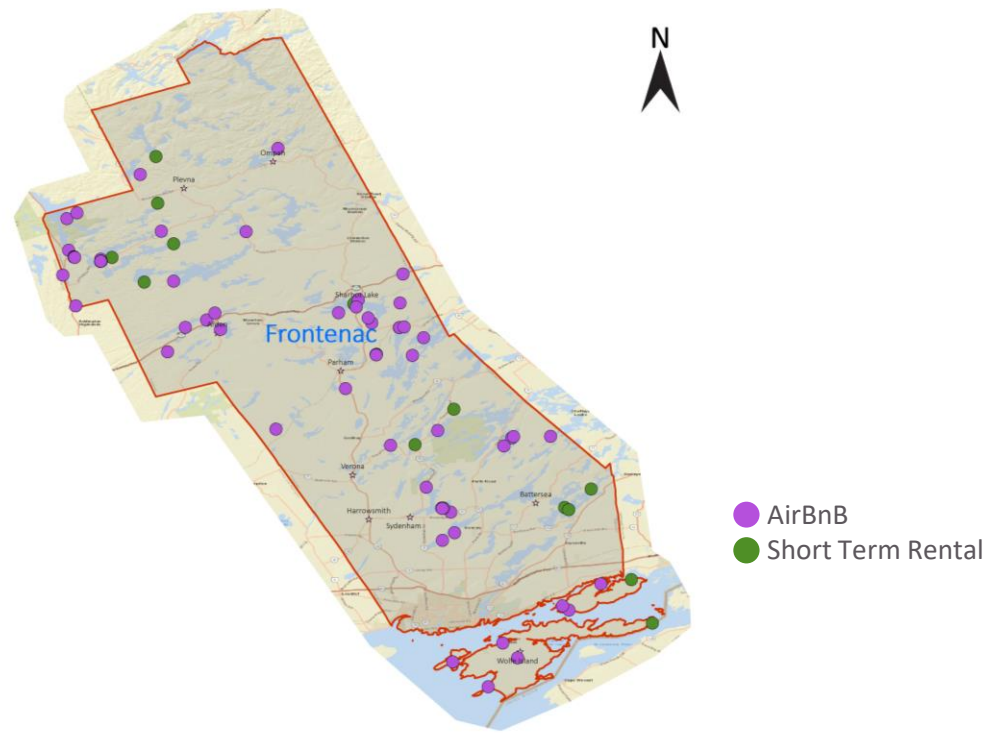
# FRONTENAC TOURISM ASSETS MAPPING: AIRBNB & SHORT TERM RENTAL

AirBnB and Short Term Rentals represents 27% of Frontenac’s tourism assets within RTO9, with 25 assets.

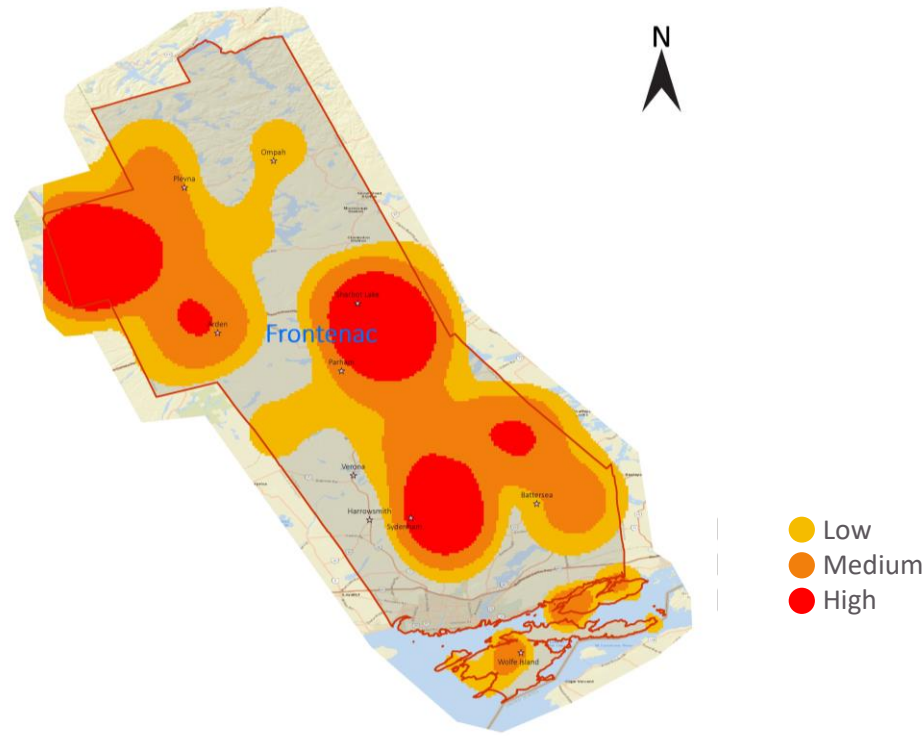
AirBnB and Short Term Rentals together represent 74% of Frontenac’s Accommodation assets within RTO9, with the majority being AirBnB style accommodation (56%). Frontenac has a limited offering of this accommodation type, which is largely dispersed throughout the county.

- **CLUSTERS:** Three main clusters exist, in the upper, middle and lower regions of the county.
- **GAPS:** Lennox & Addington is generally sparsely populated with AirBnB and Short Term Rentals, with no options available in the regions surrounding the main clusters mentioned above.

DISTRIBUTION OF AIRBNB/SHORT TERM RENTAL ASSETS



DENSITY OF AIRBNB/SHORT TERM RENTAL ASSETS



## OVERVIEW

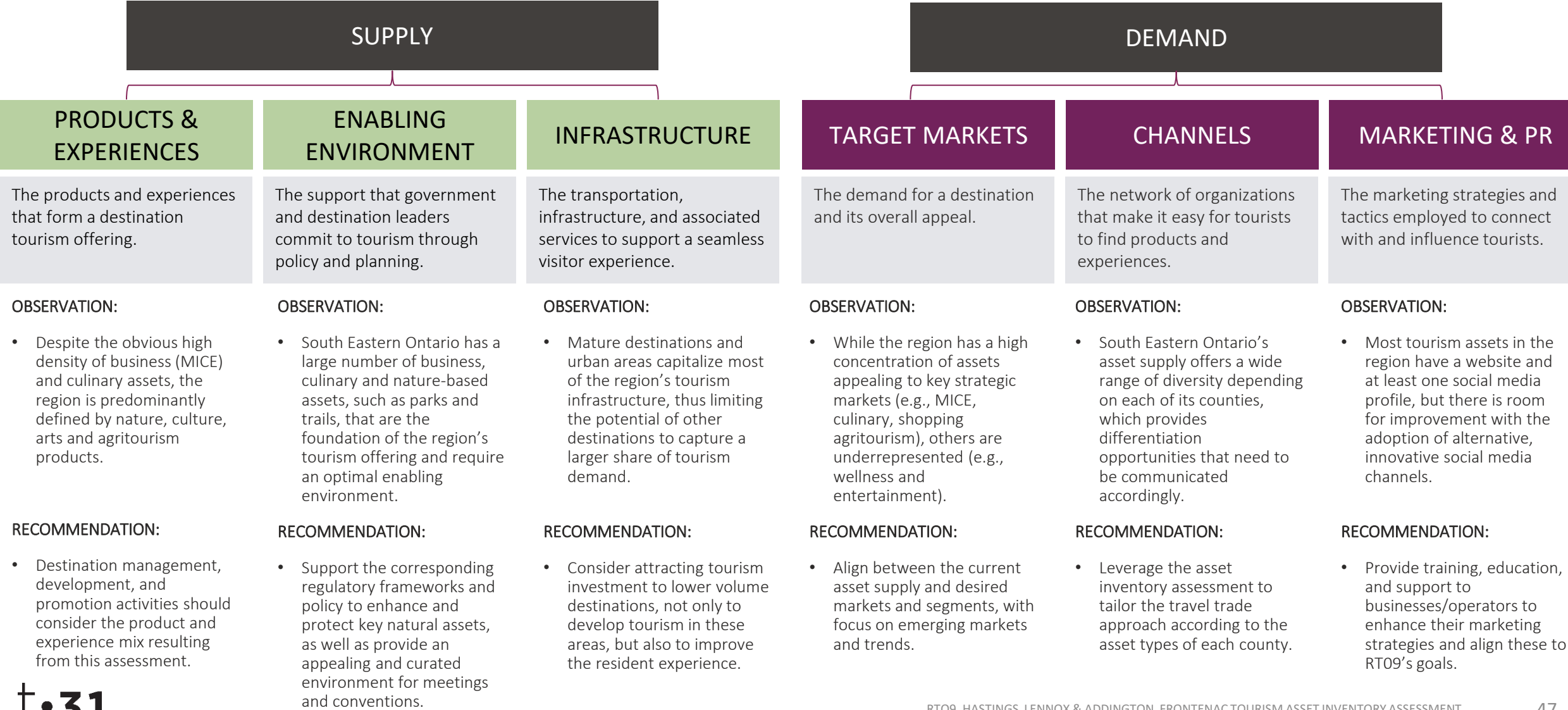
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- Project Background & Objectives
- Methodology
- Tourism Asset Inventory Overview & Analysis
- Tourism Assets Mapping
- Key Takeaways



# KEY TAKEAWAYS

South Eastern Ontario has a strong mix of tourism assets in line with other peer destinations, with specific asset clusters and gaps identified across the region, which should inform RTO9’s key strategic decisions and support its industry stakeholders.



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