

# INAUGURAL REGIONAL TOURISM DESTINATION STRATEGY FOR THE UNITED COUNTIES OF LEEDS AND GRENVILLE

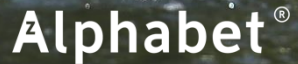
Regional Tourism Destination Strategy

June 2022

The logo for "Twenty 31", with "Twenty" in a white serif font and "31" in a white bold sans-serif font inside a white arrow-shaped box pointing to the right.

Twenty 31

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# Foreword

The United Counties of Leeds and Grenville (Leeds Grenville, the Counties) have impressive **tourism assets**. From waterways to pathways, quaint villages and towns, lakes, forests and lookouts, a UNESCO Biosphere, the Rideau Canal – Ontario’s only UNESCO World Heritage site and the 1000 Islands – the Counties have it all!

And, while COVID has fundamentally shifted tourism, from consumer and traveller behaviour to marketing and sales channels to the opportunity to now “work from anywhere,” **tourism assets and experiences in Leeds Grenville will be in demand for decades to come.**

Leeds Grenville tourism assets, destinations, and experiences however, are siloed and in some cases fragmented, with little common thread to link tourism across the region. **Some of these assets, destinations, and experiences are mature, built for a different era and simply lack reinvestment and upkeep to command higher rates and longer stays – while other parts of the region are brand new to tourism and are in need of a roadmap to leverage burgeoning tourism assets and ability to attract visitors and investors.**

Because of these challenges and opportunities, the Counties, under the leadership of the Economic Development Office of Leeds Grenville, has commissioned the development of an inaugural Regional Tourism Destination Strategy, steeped in research and public engagement, to determine where and how the region can address some of its shortcomings and leverage its opportunities – **to create a vision for the future of tourism and to instill a strong tourism culture in the region to realize its full tourism potential – a potential that will galvanize communities, and tourism experiences under a single banner and the Counties-wide leadership.**

How will we do this?

**We will realize this potential by ensuring that tourism plays a leadership role – through the ‘Counties Tourism Office’ – that complements existing DMOs and municipal tourism/economic development offices** by bringing stakeholders together, continuously communicating the vision of a unified tourism future, sharing research and trends to support aligned decision-making, developing cross-regional trails and itineraries, and collaborating on the creation of unique and innovative ways of supporting the tourism supply and marketing.

Finally, the tourism industry is acutely aware that the road that lies ahead is fraught with risks and challenges. While there is understandable apprehension around new potential COVID waves, international conflict, the possibility of a looming recession, and severe labour shortages and bottlenecks – tourism will face even greater challenges ahead. This provides an even stronger case for the need to create a concerted Regional Tourism Destination Strategy that can help manage risks and action opportunities.

The Regional Tourism Destination Strategy prioritizes creation of the Counties Tourism Office, which, together with regional stakeholders and DMOs, will provide a homebase from which to action the many complementary initiatives outlined in this strategy – ensuring Leeds Grenville becomes an even greater destination of choice for the future.

# Acknowledgements

Tourism is a collaborative effort – it is highly dependent on the industry that it supports, from a wide array of stakeholders directly and indirectly engaged in developing and supporting the conditions for tourism to thrive. The Regional Tourism Destination Strategy and underlying Destination Management, Development, and Marketing and Communications Plans have

been developed with extensive consultation from a wide variety of tourism stakeholders from all parts of the region. We are thankful for their support, participation, and ideas to help recover tourism as quickly as possible, protect the industry from disruptive forces, and consider new ways for Leeds Grenville’s tourism industry to adapt to a new tourism future.

## UNITED COUNTIES OF LEEDS AND GRENVILLE COUNTIES COUNCIL

- Herb Scott, Mayor, Township of Athens
- Doug Malanka, Mayor, Township of Augusta
- Pat Sayeau, Mayor, Township of Edwardsburgh Cardinal
- Brant Burrow, Mayor Township of Elizabethtown-Kitley
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- Nancy Peckford, Mayor, Municipality of North Grenville
- Arie Hoogenboom, Mayor, Township of Rideau Lakes
- Robin Jones, Mayor, Village of Westport

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- Ray Callery, United Counties of Leeds and Grenville
- Janet Campbell, Mrs. McGarrigles Fine Food Shop
- David Dunn, Rideau Woodland Ramble Inc.
- Katherine Hobbs, Ontario Ministry of Tourism White Paper Steering Committee / previously with Brockville Tourism
- Lisa McLean, Le Boat
- Colleen Nolan, Indigenous Tourism Ontario

- Katie Nolan, Grenville Community Futures Development Corporation
- Cynthia Peters, Maison Maitland
- Bonnie Ruddock, Regional Tourism Organization (RTO) 9
- Pierre Santoni, VIA Rail Canada
- Jason Saraccini, Landsby Canada
- Corinna Smith-Gatcke, Township of Leeds and the Thousand Islands
- Carol Sudds, Rockport Boat Line

## STAFF SUPPORT – LEEDS GRENVILLE ECONOMIC DEVELOPMENT OFFICE

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- 1000 Islands International Tourism Council - Corey Fram
- 1000 Islands Playhouse - Alyssa de Hoop
- 1000 Islands Tourism - Meg Dabros
- Aqua World - Stefano Ferrante
- The Aquatarium - Thomas Harder
- Township of Athens - Michele Hollingsworth
- Augusta Economic Development and Tourism Committee

- Township of Augusta - Steve McDonald
- Big Rideau Lake Association
- City of Brockville - Sandra MacDonald
- Brockville Museum/Genealogy - Natalie Wood
- Brockville Tourism - Sarah Laturnus
- Canopy Growth Corporation – Tweed - Sean Webster
- City Cruises – Gananoque - Mory DiMaurizio, Ross MacCarney
- Destination Ontario - Sandra Rice
- Township of Edwardsburgh Cardinal - Dave Grant, Wendy Van Keulen
- Township of Elizabethtown-Kitley - Alison Merkley
- Township of Front of Yonge - Jennifer Ault, Richard Marcoux
- Frontenac Arch Biosphere Network - Helen Anne Hudson, Steve McGovern, Julie Servant
- Grenville Heritage Properties - Sandra Lawn
- Town of Gananoque - Shellee Fournier, Amanda Trafford, Doug Wark
- Happy Green Acres / 1000 Islands RV Centre - Henry Boer

→ continued...

# Acknowledgements (Continued)

## BUSINESS / ORGANIZATIONS / MUNICIPAL PARTICIPANTS (continued)

- Deb Hamilton - previously with Brockville Tourism
- The Ivy Lea Club/Riva - Joe Pal
- Kemptville Live, Kemptville Campus Agroforestry Centre/Sugarbush - Karen Bedard
- Kingston Tourism - Megan Knott
- Henderson Digital Marketing and Printing - Bob Pearce
- Holiday Inn Express & Suites, Quality Inn & Suites, Travelodge - Jeff Brown
- Horton Homestead Maple Syrup - George Horton
- Lakeline Lodge - Irene Ireland
- Leeds & Grenville Branch, The Ontario Genealogical Society - Patti Mordasewicz
- Township of Leeds and the Thousand Islands - Katie Forrester, Marnie Venditti
- Merrickville – Wolford and District Chamber of Commerce Board of Directors, Yves Grandmaitre
- Merrickville's Makers Markets
- Merrickville Community Development Advisory Committee
- No. 9 Gardens - Andrew Davies
- Municipality of North Grenville Tourism Sub Committee
- Municipality of North Grenville – Gary Dyke, Heather Currie Whiting, Hilary Geneau, Amy Martin
- The Opinicon - Fiona McKean
- Ontario Ministry of Heritage, Sport, Tourism and Culture Industries, Regional Services Branch - Sharon Proulx, Mia Robertson
- Ontario Trails Council - Patrick Connor
- Ottawa Airport - Joel Tkach
- City of Ottawa - Vivi Chi
- Ottawa Tourism - Kelly Hausler
- Parks Canada - Ron Hallman, Martha Lee Marpole, Elizabeth Pilon
- Town of Prescott - Dana Valentyne
- Township of Rideau Lakes - Mike Dwyer, Marie White
- Rideau Lakes Economic Development Committee
- Rideau Tours - Anne Marie Forcier
- Shorelines Casino Thousand Islands & Winward Restaurant - Nancy Shaw
- Town of Smiths Falls - Julia Crowder
- St. Lawrence Parks Commission - Bob Runciman, Hollee Kew, Krista Doyle
- St. Lawrence Shakespeare Festival - Ingrid Bjornson
- Upper Rideau Lake Association
- Vogue & Rogue Weddings - Gillian Price
- Water Wood Westport Bed & Breakfast - Nancy Sendell
- Wendy's Country Market - Wendy Banks
- Village of Westport - Kimberly Westgate
- Westport Arts Council
- Windmill Brewery/Bridgeview Dockside Restaurant & Patio - Sean Lucey

And, a big thank you to the many not mentioned here who have shared their insights and guidance along the way.

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## List of Abbreviations

- **ATV:** All Terrain Vehicle
- **CSE:** Canadian Signature Experiences
- **DMO:** Destination Management Organization or Destination Marketing Organization
- **EV:** Electrical Vehicle
- **FAM TOUR:** Familiarization Tour
- **FIT:** Free Independent Travellers
- **HR:** Human Resources
- **MHSTCI:** Ontario's Ministry of Heritage, Sport, Tourism and Culture Industries
- **ON:** Ontario
- **QC:** Québec
- **QR:** Quick Response (as in "QR Code")
- **RFP:** Request for Proposal
- **ROI:** Return on Investment
- **RTO9:** Regional Tourism Organization 9 (South Eastern Ontario)
- **SEO:** Search Engine Optimization
- **SMEs:** Small- to-Medium Enterprises
- **UNESCO:** United Nations Educational, Scientific and Cultural Organization

# Executive Summary: Overview

The United Counties of Leeds and Grenville Regional Tourism Destination Strategy (the Strategy) accelerates opportunities to galvanize the tourism industry around a common regional vision and plan – ensuring that tourism is prioritized, and that it effectively generates the highest possible return on investment for tourism stakeholders across the Counties.

The Strategy addresses the key challenges facing the region including fragmentation, lack of collaboration, identity, competitiveness and others – to develop a destination that entices visitors to choose the Counties, stay longer, and spend more, while creating a sense of pride for its residents, operators, and partners.

## Before...

Prior to development of the Regional Tourism Destination Strategy, Leeds Grenville’s tourism industry was characterized by:

- Siloed tourism organizations
- No compelling message for visitors to explore region, stay longer, or spend more
- Redundancy of regional marketing efforts
- Limited appreciation and value for tourism from communities and local industry
- Confusion around regional tourism boundaries, identity, offerings, and investment opportunities
- Limited revenue and career opportunities among tourism operators in the region

## LEEDS GRENVILLE REGIONAL TOURISM DESTINATION STRATEGY



## After....

After approval and implementation of the Regional Tourism Destination Strategy, Leeds Grenville’s tourism industry will be characterized by:

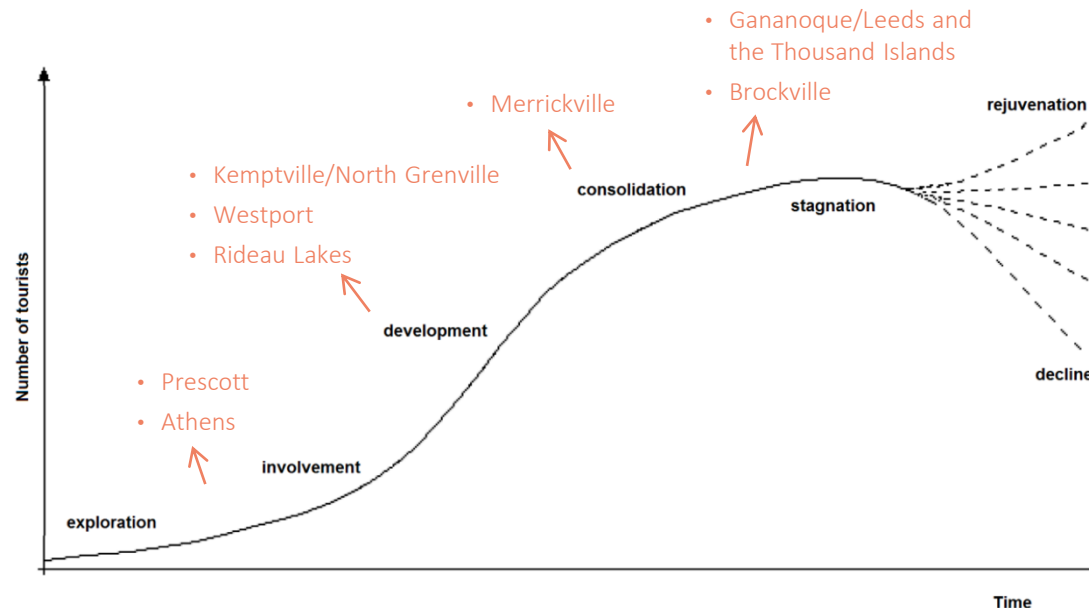
- DMOs collaborating to improve regional tourism offerings and promotion
- Greater awareness of all that Leeds Grenville offers visitors and its communities
- Visitors staying longer and spending more
- Community and industry understanding of the importance of tourism and its prioritization
- A blueprint for investors, entrepreneurs, and municipalities/DMOs to close gaps between visitor desires and what is available in the region

## Executive Summary: The Main Challenge

To best understand Leeds Grenville’s fundamental challenge to support a regional tourism approach, we turned to Butler’s Tourism Area Life Cycle Model, which provides insight into the evolution and life stages of tourism management of destinations.

Butler’s Tourism Area Life Cycle Model is a simplistic linear model that plots different stages in tourism development based on tourist number growth and time. It outlines six specific stages of tourism development.

For Leeds Grenville, destinations like Gananoque and Brockville have been in the business of tourism for decades, and should continue to be, while others are at earlier stages of tourism development – challenges and opportunities will vary depending on where the region’s communities fit on this model. This strategy considers the Leeds Grenville tourism dichotomy and establishes an approach that caters to all Leeds Grenville destinations, no matter where they sit on Butler’s Tourism Area Life Cycle Model.



Illustrative

# Methodology

It is critical that the Strategy be rooted in evidence that comes from triangulating multiple sources of information. This is necessary to ensure a holistic understanding of the Counties' current tourism context, and to gain buy-in from the individuals that have a stake in the outcome of the strategy.

*Phase One* included a review of existing strategies, plans, research, and more (see **Appendix A**), as well as comprehensive engagement with tourism stakeholders across the Counties (see **Appendix B** for stakeholder engagement summary) to develop a thorough baseline of the current tourism context, an understanding of the tourism challenges and opportunities, vision, guiding principles, and common objectives. It then focused on prioritizing the most

important approaches and initiatives based on the impact they can have on achieving objectives, and their ease of implementation (see Initiative Prioritization Assessment in **Appendix C**). This phase resulted in the development of the first Regional Tourism Destination Strategy, as well as the Destination Management and Destination Development plans.

*Phase Two* leveraged the Regional Tourism Destination Strategy, and Destination Management and Destination Development Plans to formulate a Destination Marketing and Communications Plan.

Finally, *Phase Three* focused on developing detailed action plans and socializing those plans with key tourism stakeholders to ensure buy-in and alignment.



# How to Read This Document: A Regional Tourism Destination Strategy Framework

The framework used to first structure Leeds Grenville’s Regional Tourism Destination Strategy, followed by the Destination Management, Destination Development, and Destination Marketing and Communications Plans, allows for the flexibility needed to navigate a post-pandemic tourism environment. It is rooted in evidence, informed by a detailed understanding of the region’s tourism context, engagement through myriad interviews, workshops, and surveys with Leeds Grenville’s economic development leadership, steering committee, staff, DMOs, associations, and the many other key tourism stakeholders in the community, to structure a path forward.

The outlined strategy begins by first laying out tourism values, through the development of guiding principles that the Counties wants to ensure remain constant as it executes its strategic direction moving forward. It is followed by an understanding of key short, medium, and long-term challenges and opportunities, before setting the vision, along with the strategic objectives necessary to achieve that vision.

With the strategic objectives set, details of the strategy begin to emerge with a breakdown of the initiatives by pillar (i.e., Destination Management, Destination Development, and Destination Marketing and Communications Plans) along with the key tactical actions, timelines, responsible stakeholders, and key measures for each to ensure the successful implementation of the Strategy over the next months and years to come.

GUIDING PRINCIPLES	Values that guide tourism stakeholders to accomplish its vision
CHALLENGES & OPPORTUNITIES	Short and long-term barriers that need to be addressed
VISION & MISSION	Direction for tourism in Leeds Grenville that reflects tourism stakeholder needs, potential visitors, and the communities that are served
OBJECTIVES	Intentions Leeds Grenville sets to develop or enhance tourism
PILLARS & INITIATIVES	<p>Initiatives organized in Destination Management, Destination Development, and Destination Marketing and Communications pillars that:</p> <ul style="list-style-type: none"> <li>• Can be supply-driven reflecting currently under-leveraged, competitive opportunities;</li> <li>• Can be demand-driven like an under-targeted group of prospective visitors; and</li> <li>• Are prioritized based on impact and ease of implementation.</li> </ul>
TACTICAL IMPLEMENTATION PLAN	<p>Includes actions, timelines, responsible stakeholders, and key measures that:</p> <ul style="list-style-type: none"> <li>• Support implementation of objectives and pillar initiatives;</li> <li>• Ensures conditions for success are met and sufficient resources are available to develop opportunities;</li> <li>• Oversees tourism enabling environment and infrastructure support for product and experience development/enhancement; and</li> <li>• Includes outlining market characteristics and key messaging for those inclined to travel to Leeds Grenville.</li> </ul>

## Guiding Principles

Guiding principles represent the shared values and beliefs of a destination's tourism industry. For Leeds Grenville, they guide the sometimes difficult decisions that need to be taken, and apply them in all circumstances, regardless of changes in goals, strategies, type of work, or management.



1. We support our communities above all, engaging them and other key tourism stakeholders to understand their needs and act on their behalf, while communicating the value of tourism and the role they each play in it.
2. We operate without borders; we are united, inclusive, and equitable with all tourism stakeholders and assets, celebrating the uniqueness, diversity, and genuine character of our entire region.
3. We strive to protect our one-of-a-kind and natural environment to ensure its enjoyment by current and future generations of residents and guests.
4. We welcome our guests warmly ensuring they leave feeling that they received a higher-standard tourism experience than if they had chosen another destination.
5. We root our decisions in evidence and measure results of our actions, enabling us to take calculated risks, while also being accountable and responsible to all our stakeholders.

# Challenges

Discovery conducted to form the Strategy delved deeply into understanding the systemic challenges impacting tourism in the region directly from Leeds Grenville leadership and staff, and many other public and private sector tourism stakeholders – as well as a study of the current tourism environment globally, domestically, provincially, and locally.

While the list below does not represent all tourism challenges that Leeds Grenville faces, it outlines the most critical ones.

Challenges are divided into two categories:

1. Those that have an immediate impact on tourism revenues in the short-term; and,
2. Longer-term, systemic challenges facing tourism in Leeds Grenville.



## Challenges (Continued)

### 1. Challenges that have an immediate impact on tourism recovery in the short-term

Challenge	Description	Potential Impact	Management/Actions
1. Labour	<ul style="list-style-type: none"> <li>Insufficient trained labour across almost all sectors leading to limited staff for direct and indirect tourism businesses and organizations</li> </ul>	<ul style="list-style-type: none"> <li>If not addressed, upcoming tourism seasons may be severely impacted, potentially leading to reduction in products and services and/or quality, dissatisfied visitors, and in turn, further operator closures</li> </ul>	<ul style="list-style-type: none"> <li>Engage in a broad regional tourism labour committee to assess actual labour situation and develop potential solutions to overcome identified challenges</li> <li>Examples to overcome labour challenges include working with educational institutions for youth employment, seniors, and newcomers to encourage training and support, business model adjustments, and digital transformation</li> </ul>
2. Immediate competitiveness	<ul style="list-style-type: none"> <li>Many more unified destinations, some with deeper pockets within ON, Canada, and across the world, all vying for a smaller amount of tourists, primarily caused by lifting of travel restrictions due the global pandemic</li> </ul>	<ul style="list-style-type: none"> <li>Visitors are enticed to travel to other destinations causing them to spend less time and dollars in Leeds Grenville</li> </ul>	<ul style="list-style-type: none"> <li>Leverage existing research to understand potential target markets/niches along with their behaviours, motivations, and needs</li> <li>Create small, action-oriented campaigns targeted to regional and provincial audiences enticing them to visit imminently</li> </ul>

## Challenges (Continued)

### 2. Longer-term, systemic challenges facing tourism in Leeds Grenville.

Challenge	Description	Potential Impact	Management/Actions
1. Leadership	<ul style="list-style-type: none"> <li>Lack of regional leadership focused on tourism, creating a common vision for tourism in Leeds Grenville, and ensuring alignment across all tourism stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Industry stakeholders across the region prioritize what's important to them versus what might be best for the region as a whole (which may also include themselves)</li> <li>Tourism investors (both local and international) unwilling to invest and take risks in the region because there is no cohesive plan</li> </ul>	<ul style="list-style-type: none"> <li>Clearly define a business case for a leading Counties regional tourism office for Leeds Grenville, along with its remit, governance, structure, funding, and operational plans</li> <li>Seek approval from key stakeholders and secure funding</li> <li>Communicate establishment of regional tourism leadership organization along with its strategy and plans</li> </ul>
2. Collaboration	<ul style="list-style-type: none"> <li>Tourism organizations across the region work in silos contributing to overlapping efforts, smaller opportunities for more practical investment in product development and marketing</li> <li>Lack of opportunities to connect tourism stakeholders to network and create more products and experiences for visitors and community members to enjoy</li> </ul>	<ul style="list-style-type: none"> <li>Other more collaborative destinations, some with deeper pockets, replace Leeds Grenville as a place for visitors/visitor spending</li> <li>Overlapping efforts undertaken by tourism enablers across region more costly and time-consuming</li> <li>Tourism stakeholders and visitors not benefitting from all that Leeds Grenville has to offer</li> </ul>	<ul style="list-style-type: none"> <li>Identify and standardize two-way communications and engagement with tourism stakeholders by sharing relevant information to enable better decisions, in line with the regional tourism vision</li> <li>Create more inclusive networking opportunities for tourism stakeholders across the region to partner and innovate</li> </ul>
3. Identity	<ul style="list-style-type: none"> <li>Confusion with what the concept of Leeds Grenville is among tourism stakeholders throughout region</li> <li>No clear way to describe Leeds Grenville to potential visitors or residents</li> <li>No big theme, or demand-generator to drive immediate interest to visit Leeds Grenville</li> </ul>	<ul style="list-style-type: none"> <li>Individual tourism organizations work independently to communicate what their destination is all about – a more costly and time-consuming proposition</li> <li>Stakeholders, let alone visitors, find it difficult to connect the region to a particular theme or feeling, which is important for branding and enticing visitation</li> </ul>	<ul style="list-style-type: none"> <li>Clearly articulate a theme for the region along with a sub-theme architecture to facilitate marketing the region and communicating all that it has to offer</li> <li>Provide tourism stakeholders opportunities and the option of leveraging regional theme and sub-themes in their marketing and communications</li> </ul>

→ continued...

## Challenges (Continued)

### 2. Longer-term, systemic challenges facing tourism in Leeds Grenville.

Challenge	Description	Potential Impact	Management/Actions
4. Products & experiences	<ul style="list-style-type: none"> <li>While the Counties have many tourism offerings, lack of cross-regional products, experiences, routes, trails, itineraries and packages to entice visitors to come, spend more time, and more dollars</li> <li>Under-utilized assets not being leveraged to draw visitors and provide them with more options to enjoy experiences across the region</li> </ul>	<ul style="list-style-type: none"> <li>Municipalities across the region focus on creating their own products and experiences, providing less options for visitors to stay longer and spend more</li> <li>Full potential return for region not realized as visitors lack options to spend more and return</li> <li>Lack of opportunity for dispersion into other parts of the region, causing some municipalities to lose out on revenues, due to the perception of lack of things to do</li> </ul>	<ul style="list-style-type: none"> <li>Bring tourism organizations together to identify/create more sustainable tourism products and experience innovation and development programs</li> <li>Work with federal and provincial partners to identify and provide funding and reduce red-tape for development of new (including year-round) regional tourism products and experiences</li> </ul>
5. Infrastructure & visitor/ community amenities	<ul style="list-style-type: none"> <li>Lack of tourism infrastructure across the region, mostly due to high costs for individual municipalities to address on their own (e.g., public washrooms, parking, elective vehicle charging stations, etc.)</li> <li>Lack of digital infrastructure such as Wi-Fi and connectivity</li> <li>Under-utilized infrastructure that may be put to use to support visitor and resident experience</li> </ul>	<ul style="list-style-type: none"> <li>Visitors tend not return to the region due to negative experiences with public infrastructure, or lack thereof</li> <li>Reduces perception of quality of experience across the region potentially leading to negative word-of-mouth</li> <li>Exclusion of certain types of visitors due to specific tourism infrastructure needs</li> </ul>	<ul style="list-style-type: none"> <li>Bring tourism organizations and community members together to identify areas for infrastructure development</li> <li>Work with federal and provincial partners to identify and provide funding and reduce red-tape for development of new (including year-round) regional tourism products and experiences</li> <li>Regularly communicate infrastructure updates to residents to make them aware of the value tourism brings, beyond tourism receipts</li> </ul>

# Opportunities

Stakeholder engagement and a review of key tourism trends revealed opportunities that Leeds Grenville can leverage to achieve possible outcomes over the next five years.

While the list below does not represent all tourism opportunities that are available to the Counties, it outlines opportunity themes that are most critical to the region's future success.

Opportunity themes can be grouped in two categories:

1. Immediate and short-term opportunity themes; and,
2. Medium and long-term opportunity themes.



## Opportunities (Continued)

### 1. Immediate and short-term opportunity themes

Opportunity	Description	Potential Impact	Management /Actions
1. Establishment of role as regional tourism leader	<ul style="list-style-type: none"> <li>Clearly articulate remit, governance, structure, funding source, and operational plans of the Strategy ensuring no overlap/additional layers with other tourism enabling organizations (i.e., DMOs/municipalities)</li> <li>Gain Council approval for business plan to create a regional tourism entity and secure source(s) of funding</li> </ul>	<ul style="list-style-type: none"> <li>Direction provided to tourism stakeholders so they can align their vision and actions</li> <li>Tourism stakeholders in the region spend dollars more effectively knowing there is a Counties tourism office that will support specific, non-overlapping priorities</li> </ul>	<ul style="list-style-type: none"> <li>Finalize, review, and approve the Strategy</li> <li>Seek funding to support approved Strategy initiatives</li> </ul>
2. Communicating value of regional tourism with key stakeholders	<ul style="list-style-type: none"> <li>Allay hesitancy of municipal tourism players on the value a Counties tourism office can bring to support driving their agendas as well</li> <li>Address potential negative resident sentiment towards tourism by communicating areas that tourism improves quality of life</li> </ul>	<ul style="list-style-type: none"> <li>Added energy and momentum from tourism stakeholders to focus on developing/enhancing their tourism sector</li> <li>Residents understand importance of and need to provide support, particularly funding, to tourism</li> </ul>	<ul style="list-style-type: none"> <li>Complete stakeholder analysis to identify all tourism stakeholders and understand their needs to develop messaging and communication vehicles to reach them</li> <li>Starting with communities most amenable to tourism, begin communicating importance of tourism to supporting local economies and quality of life</li> </ul>
3. Packaging products and experiences	<ul style="list-style-type: none"> <li>Create packages, itineraries, and routes for things to do across Leeds Grenville to make it easier for visitors to choose the region and stay longer to explore more offerings</li> </ul>	<ul style="list-style-type: none"> <li>More visitors choose Leeds Grenville because they are easily able to find the experiences they are seeking, and it is easy for them to envision what different itinerary options may look like</li> <li>Tourism dispersion and generation of wealth for communities and tourism stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Review and analyze inventory of existing Leeds Grenville products and experiences</li> <li>Consider identifying and developing packages, itineraries, and experiences based on existing offerings</li> <li>Communicate identified packages, itineraries, and experiences through website, social media, and other channels</li> </ul>
4. Small, short-term media campaigns to promote Leeds Grenville	<ul style="list-style-type: none"> <li>Promote Leeds Grenville and the wealth of experiences it offers to people in the region; potential to entice visitors in Ottawa to also experience Leeds Grenville</li> <li>Focus on global trends and traveller desires that Leeds Grenville matches with (e.g., rural, agri-tourism, culinary, culture, open spaces, waterfront, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Development of marketing campaigns to reach a high volume of potential visitors for 2022 and 2022/2023 winter/shoulder season</li> <li>Generation of visitor revenues and tourism wealth for communities and tourism stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Develop highly-targeted marketing campaigns to create interest and immediate travel decisions, along with initial marketing assets (e.g., images, videos, etc.)</li> <li>Ensure marketing plans remain nimble to anticipate tourism limitations caused by potential external factors such as new COVID variants, border restrictions, etc.</li> </ul>

## Opportunities (Continued)

### 2. Medium and long-term opportunity themes

Opportunity	Description	Potential Impact	Management /Actions
1. Shifting mindset of tourism stakeholders across region	<ul style="list-style-type: none"> <li>Longer-term, begin converting mindset of local tourism stakeholders, communities, and residents to prioritize tourism/regional tourism</li> </ul>	<ul style="list-style-type: none"> <li>Leeds Grenville more efficiently leveraging resources to support wealth generation for its communities</li> <li>Visitors have a more seamless experience, stay longer, spend more, and want to return</li> <li>Tourism prioritized as an industry, bringing awareness to value it offers, as well as investment dollars</li> </ul>	<ul style="list-style-type: none"> <li>Continue to communicate/educate Leeds Grenville business and residents on the benefits of tourism across the region, including the visitor dollars it generates and the improved quality of life it brings its communities</li> </ul>
2. Establishing and building buy-in on clear brand identity for Leeds Grenville	<ul style="list-style-type: none"> <li>Tourism stakeholders and residents can clearly define Leeds Grenville</li> <li>Visitors have a clear view of what to expect when visiting Leeds Grenville</li> </ul>	<ul style="list-style-type: none"> <li>Tourism stakeholders can clearly understand how to fit into the overall Leeds Grenville theme</li> <li>Tourism stakeholders can more clearly articulate the benefits of visiting the region</li> <li>Visitors and investors have clearer understanding of Leeds Grenville as a destination</li> </ul>	<ul style="list-style-type: none"> <li>Action marketing and communications long-term plan</li> <li>Continuously communicate Leeds Grenville brand theme and identity</li> </ul>
3. Focusing on regional elite experiences	<ul style="list-style-type: none"> <li>Create uniquely Leeds Grenville packages and itineraries of experiences to make it more enticing for visitation, spending more time and money</li> </ul>	<ul style="list-style-type: none"> <li>Elite experiences encourage higher-level of services and generation of experiences for higher-yield visitors</li> <li>Support seasonal dispersion improving overall quality of Leeds Grenville offerings</li> <li>Generation of tourism wealth for communities and tourism stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Create inventory of uniquely Leeds Grenville tourism products and experiences across the region</li> <li>Consider identifying and developing elite packages and itineraries</li> <li>Leverage technology to facilitate accessing and booking opportunities for visitors</li> </ul>
4. Identifying and supporting visitor/community amenities	<ul style="list-style-type: none"> <li>There are a number of infrastructure initiatives that can be developed to support regional tourism sustainably – from public washrooms, boating docks, electric vehicles charging stations, additional public parking areas, incentives to support more roofed accommodations, etc.</li> </ul>	<ul style="list-style-type: none"> <li>More options and seamless experiences for visitors make it easier for them to access the region, stay longer, visit more often, and contribute to Leeds Grenville wealth generation</li> </ul>	<ul style="list-style-type: none"> <li>Identify list of infrastructure projects across the region, and create prioritization assessment to determine those most likely to have greatest returns financially, for the community, and for the environment</li> <li>Work with partners/investors to advocate for, and implement infrastructure projects</li> </ul>

## Vision & Mission

Leeds Grenville's tourism vision is an aspirational view of the future for tourism in the Counties that is meant to inspire visitors, staff, and partners while providing guidance on how to get there successfully.

It represents the hope for the kind of tourism that Leeds Grenville wants as it aims to accomplish its tourism objectives – a tourism future developed by design.

### VISION

A desired year-round destination that entices visitors and residents with an array of unique, diverse, high-quality, and celebrated traveller experiences.

### MISSION

Nurturing a regional tourism culture that clearly, inclusively, and collaboratively balances the needs of our visitors, tourism partners, communities, and environment.



# Objectives

To achieve its vision, Leeds Grenville needs to consider the entire tourism ecosystem. It needs to satisfy economic development objectives by first and foremost supporting tourism stakeholders hardest hit by the pandemic over the last two years to accelerate wealth

development and job growth. It understands that decisions made on behalf of the tourism industry also impact the communities in which tourism happens, as well as its surrounding physical environment.



## ECONOMIC

- 1. REGIONAL TOURISM LEADERSHIP**  
Establish leadership to align tourism stakeholders and communities to develop and implement a holistic vision for tourism in the region.
- 2. MORE REVENUE & PROFIT**  
Instill sense of collaboration to support revenue and profits growth through product development and visitor awareness and understanding of tourism offering.
- 3. ATTRACT & RETAIN INVESTORS**  
Inform investors (large and small) about the plan, and prioritization and potential of tourism in the region. Investors will develop products, experiences, and tourism assets that reflect plans for best potential ROI.



## SOCIAL

- 4. INCLUSIVITY**  
Integrate voices of all types of communities, residents, and Indigenous peoples as part of the tourism conversation.
- 5. VALUE OF TOURISM**  
Clearly articulate the value of Leeds Grenville tourism to communities and residents, improving tourism's perception.
- 6. COMMUNITY/RESIDENT BENEFITS**  
Improve awareness of amenities that are provided because of tourism and understanding that public investment in tourism will continue to support the community.



## ENVIRONMENTAL

- 7. ENVIRONMENTAL IMPACT**  
Infuse environmental considerations more comprehensively in key tourism programs, building awareness of tourism stakeholders as well as visitors on their responsibility towards environment.

# Pillars & Initiatives

Leeds Grenville’s Regional Tourism Destination Strategy is broken down into three pillars:

1. Destination Management;
2. Destination Development; and
3. Destination Marketing and Communications.

Each pillar contains a number of initiatives that Leeds Grenville should undertake over the next 5 years to achieve its vision. Tactical actions, timelines, responsible stakeholders, and measurable outcomes for each initiative are outlined in the following sections. See **Appendix D** for detailed actions at a glance.

1

## DESTINATION MANAGEMENT

1. Establish the Counties Tourism Office
2. Create regional tourism leadership committee to oversee Regional Tourism Destination Strategy implementation
3. Improve regional tourism destination stakeholder collaboration and partnership
4. Collect and share market and resident sentiment research Quick Win
5. Improve regional tourism stakeholder communications
6. Develop and communicate tourism investment attraction plan

2

## DESTINATION DEVELOPMENT

7. Address immediate labour bottlenecks
8. Improve and share tourism product and experience inventory with key tourism stakeholders Quick Win
9. Create desired packages, itineraries, and routes
10. Develop uniquely Leeds Grenville elite packages, itineraries, and Canadian Signature Experiences
11. Identify and support enhancement and development of regional tourism infrastructure
12. Improve wayfinding opportunities (physical and digital) Quick Win

3

## DESTINATION MARKETING & COMMUNICATIONS

13. Build a Leeds Grenville tourism marketing collective, including brand development
14. Develop digital tourism channels to serve the region
15. Build a regional tourism content marketing program
16. Focus on local engagement
17. Prioritize near domestic markets (ON and QC)
18. Reconsider U.S. and international opportunities
19. Establish online distribution and sales support
20. Support a multi-channel visitor services program

# PILLAR 1 INITIATIVES: DESTINATION MANAGEMENT



DESTINATION MANAGEMENT PLAN

# Initiative 1: Establish the Counties Tourism Office

## Rationale/Description

- The Regional Tourism Destination Strategy lays out the business case for establishing the Counties Tourism Office for Leeds Grenville that prioritizes tourism as a key sector for the Counties and whose remit it is to facilitate implementation of the Counties’ Strategy, in coordination with local DMOs and municipalities, and through the guidance of a regional tourism leadership committee (see **Initiative 2**).
- This initiative focuses on gaining approval of the Strategy from Counties Council, presenting its scope focusing on regional tourism needs and opportunities as laid out in the Strategy, implementation plans, and initial resource requirements (funding and HR) based on implementation timelines. It is recommended that initial funding sources come from Counties Council and that the Counties Tourism Office should explore additional funding sources (e.g., DMO membership fees), in due time, likely in conjunction with the next iteration of the Regional Tourism Destination Strategy.
- It is the recommendation of the Strategy that the region’s inaugural Counties Tourism Office be led by a dedicated regional tourism manager, reporting to the Leeds Grenville Economic Development Office, and initially supported by one product development and one destination marketing specialist, to be ramped up over time based on the outlined Regional Tourism Destination Strategy action plan. **Appendix E** provides a non-comprehensive description of the roles of the Regional Tourism Office versus local municipalities/DMOs.

## Tactical Actions

- Seek approval for the Regional Tourism Destination Strategy from Counties Council, securing funding to establish the Counties Tourism Office, and to support implementation of initiative laid out in the Regional Tourism Destination Strategy.
- Officially establish the Counties Tourism Office embedded under the Leeds Grenville Economic Development Office.
- Consider dissolving Rideau Heritage Route Tourism Association since the Counties Tourism Office will takeover responsibilities.
- Draft and approve job descriptions for the dedicated regional tourism manager and their support team.
- Post job descriptions and hire dedicated regional tourism manager and support team.

## Timeframe/Trigger

- Immediate (0-6 months)
- Upon approval of 2023 budget

## Roles

- Counties Council (co-lead)
- Leeds Grenville Economic Development Office (co-lead)
- Leeds Grenville regional tourism leadership committee chair (co-lead)
- Leeds Grenville DMOs/municipalities (support)

## Outcomes

- Approval of Regional Tourism Destination Strategy
- Establishment of the inaugural Counties Tourism Office

DESTINATION MANAGEMENT PLAN

# Initiative 2: Create Regional Tourism Leadership Committee to Oversee Regional Tourism Destination Strategy Implementation

<p><b>Rationale/Description</b></p> <ul style="list-style-type: none"> <li>The Regional Tourism Destination Strategy requires owners who are willing and able to be accountable and responsible for its implementation. Ideally, these owners have an existing stake in the region’s tourism industry as well as the energy and influence to ensure proposed initiatives are implemented effectively.</li> <li><b>Initiative 2</b> focuses on creation of a regional tourism leadership committee, composed of individuals primarily from within and throughout the Counties who can guide the direction of tourism for the region, through the regional tourism leadership organization (see <b>Initiative 1</b>), and who will take ultimate ownership of Strategy implementation oversight.</li> <li>The regional tourism leadership committee will meet regularly to provide strategic direction and recommendations to Counties Council on important tourism matters, to be defined as part of the committee’s terms of reference.</li> <li>A key initial action of the inaugural regional tourism leadership committee is to define terms of reference, key roles, terms, key tasks and processes for conducting those tasks – including updating the plan based on the current situation and/or as future opportunities arise and overseeing the renewal of the Strategy every 3-5 years.</li> </ul>	<p><b>Timeframe/Trigger</b></p> <ul style="list-style-type: none"> <li>Immediate (0-6 months)</li> <li>Upon approval of 2023 budget</li> </ul> <p><b>Roles</b></p> <ul style="list-style-type: none"> <li>Leeds Grenville Economic Development Office (co-lead)</li> <li>Leeds Grenville regional tourism leadership committee chair (co-lead)</li> <li>Public and private sector organizations supporting implementation of the Regional Tourism Destination Strategy (support)</li> </ul>
<p><b>Tactical Actions</b></p> <ul style="list-style-type: none"> <li>Identify tourism stakeholders who would be willing and able to be part of the regional tourism leadership committee.</li> <li>Establish regional tourism leadership committee governance policies, key roles and identifying/assigning individuals to fill those roles.</li> <li>Work with the Counties Tourism Office to develop detailed project plans for initiatives identified in the Strategy.</li> <li>Meet regularly to get updates from initiative leads, address risks, and leverage learnings and opportunities.</li> </ul>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>Recommendations to Counties Council based on regional tourism leadership committee guidance</li> <li>Effective implementation of Regional Tourism Destination Strategy to meet defined outcomes</li> </ul>

DESTINATION MANAGEMENT PLAN

# Initiative 3: Improve Regional Tourism Stakeholder Collaboration and Partnerships

## Rationale/Description

- Regional tourism stakeholders, both direct and indirect, across the Counties cited a lack of collaboration across the region as one of the primary reasons for the region’s siloed tourism industry – leading to a lack of a common tourism vision for the region, redundant, inefficient, and ineffective utilization of municipal resources, and confusion as to the Leeds Grenville tourism offering for visitors.
- This suggests working with local DMOs and municipalities to develop multiple opportunities for tourism stakeholders from across the region (and beyond) to connect and network to form/enhance relationships and partnerships to support local and regional product development and promotional synergies.
- Improving opportunities for regional collaboration is an important way that the Counties Tourism Office can demonstrate immediate value to Leeds Grenville tourism stakeholders.
- This initiative should also consider opportunities to formalize partnerships with internal and external DMOs, municipalities, and associations (e.g., Brockville, Gananoque, Kemptonville, DMOs, local municipalities focused on tourism, Smiths Falls, RTO9, Ottawa Tourism, and others), as well as indirect organizations such as local universities, colleges, and secondary schools to alleviate immediate labour bottlenecks (see **Initiative 7**).

## Tactical Actions

- Work with tourism industry leaders to create a list of collaboration and partnership opportunities, including regional networking events and brochure swap.
- Create and execute a collaboration and partnership plan and communicate opportunities with relevant tourism stakeholders, including hosting of regular meetings with DMOs/municipalities.

## Timeframe/Trigger

- Short-term (6-12 months)
- ongoing

## Roles

- Counties Tourism Office (co-lead)
- Leeds Grenville DMOs/municipalities (co-lead)
- Tourism associations (support)

## Outcomes

- Understanding of available collaboration and partnership opportunities
- Detailed collaboration and partnerships plan
- Increased regional collaborations and partnerships
- Increased Leeds Grenville products and experiences
- Increased awareness and tourism revenues

DESTINATION MANAGEMENT PLAN

# Initiative 4: Collect and Share Market and Resident Sentiment Research

QUICK WIN

## Rationale/Description

- COVID-19 has had an immense impact on the tourism industry. From consumer behaviours to how destinations communicate with potential visitors, and so much more. These changes need to be continuously understood to make the best decisions for destinations and tourism stakeholders. This includes:
  - Trends research to clarify expected shifts in global, domestic, and local tourism
  - Competitive research to position Leeds Grenville as a region, vis-à-vis similar destinations and other threats
  - Consumer research in primary and up-and-coming target markets (e.g., ON, QC, the U.S., and other potential markets), to understand travel consumer needs, behaviours, and path-to-visit.
- Research needs to be sophisticated enough to support tourism operators and businesses in understanding nuances, yet practical enough to inform decisions based on the insights provided. Research may be conducted at a point in time (e.g., market segment research) while also providing continuous updates to the industry in a standard format.
- Conducting and sharing research openly represents a crucial way that the Counties Tourism Office can demonstrate immediate value.

## Timeframe/Trigger

- Short-term (6-12 months)
- ongoing

## Roles

- Counties Tourism Office (co-lead)
- Leeds Grenville DMOs/municipalities (co-lead)
- Tourism associations (support)

## Tactical Actions

- Collect, analyze, and share global, domestic, and local tourism trends research.
- Collect, analyze, and share competitor research.
- Collect, analyze, and share primary target market research conducted through surveys and digital listening.
- Explore ways to share data and insights and the implications with stakeholders, including DMOs, operators, local economic development offices, and others through online solutions.

## Outcomes

- Detailed and insightful research on tourism and competitive trends
- Detailed research on the Counties’ consumer markets and segments
- Dissemination of research to stakeholders
- More informed operator decision-making leading to additional tourism revenues

DESTINATION MANAGEMENT PLAN

# Initiative 5: Improve Regional Tourism Stakeholder Communications

## Rationale/Description

- Tourism stakeholders, both direct and indirect, from across the Counties, expressed a need for improved communications of regional tourism efforts.
- **Initiative 5** focuses on undertaking a comprehensive regional tourism stakeholder analysis to understand key stakeholder roles, needs, and key messaging required to communicate tourism matters and ensuring that all regional tourism stakeholders are equally privy to information that will support their operations in alignment with regional tourism ambitions.
- This initiative entails sharing of information, for example the existence of the Regional Tourism Destination Strategy and the status of implementation of its initiatives, as well as the continuous collection of feedback from regional tourism stakeholders to ensure their needs are being met.
- Additionally, this initiative includes development of a Leeds Grenville community-focused communications plan, including feedback loops, to ensure residents understand the value that tourism brings to the region beyond just revenue, but also in the form of amenities and infrastructure to improve local quality of life.

## Timeframe/Trigger

- Short-term (6-12 months)
- ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)

## Tactical Actions

- Conduct in-depth regional tourism stakeholder analysis detailing stakeholder type, needs, and messaging requirements.
- Create and execute a regional tourism stakeholder and resident communication plan based on stakeholder analysis and their needs.

## Outcomes

- Clear understanding of all regional tourism stakeholder communications needs
- Detailed regional tourism stakeholder communication plan and implementation
- Regional tourism stakeholders satisfied with communications content and cadence to support improved decision-making

DESTINATION MANAGEMENT PLAN

# Initiative 6: Develop and Communicate Tourism Investment Attraction Plan

## Rationale/Description

- There is no shortage of tourism opportunities, entrepreneurially-minded driven individuals, and funding available to support development and enhancement of tourism products and experiences across Leeds Grenville.
- The challenge is creating an inclusive environment that enables the connection of opportunities, entrepreneurs, and investors to innovate and begin building products and experiences for Leeds Grenville communities and visitors to enjoy.
- The Counties Economic Development and Tourism Offices should consider developing a stronger tourism investment environment by identifying barriers to attracting tourism investment and developing a strategy to attract investors and connecting them with opportunities.
- Additionally, the Counties Tourism Office, in close coordination with innovation and entrepreneurship centers across the region, needs to foster a new and innovative mindset for tourism, by creating an environment that allows for risk-taking among tourism stakeholders.

## Timeframe/Trigger

- Medium-term (12-24 months)
- ongoing

## Roles

- Leeds Grenville Economic Development Office (co-lead)
- Counties Tourism Office (co-lead)
- Regional Entrepreneurship Centres (support)
- Leeds Grenville DMOs/municipalities (support)
- RTO9 (support)
- Ministry of Heritage, Sport, Tourism and Culture Industries (support)

## Tactical Actions

- Create an investor attraction brief to entice potential investors to fund Leeds Grenville tourism opportunities.
- Explore opportunities to foster more innovation and entrepreneurship across the region in partnership with regional innovation and entrepreneurial centers.
- Work with existing regional entrepreneurship and innovation centres to identify entrepreneurs, matching them with potential high-yield tourism opportunities, and connecting them directly with investors and/or through investment pitch events.

## Outcomes

- Development of an investor attraction brief
- Increased number of tourism businesses
- Increased investment in tourism businesses
- Increased tourism revenues

# PILLAR 2 INITIATIVES: DESTINATION DEVELOPMENT



DESTINATION MANAGEMENT PLAN

# Initiative 7: Address Immediate Labour Bottlenecks

## Rationale/Description

- An identified bottleneck posing an immediate risk to recovering tourism revenues is the topic of labour – a bottleneck that nearly every destination in Canada, and around the world is facing.
- For Leeds Grenville, this bottleneck consists of a lack of trained labour to support operator operations, potentially leading to continued closures and reduction in quality offerings, especially for the upcoming tourism seasons.
- Bottlenecks are cumbersome for any one organization to manage. While we do not recommend that the Counties Tourism Office spearhead a committee to better understand and resolve this bottleneck, it should seek to initiate collaboration through a cross-sectorial committee to address the topic as quickly as possible in order to avoid potential loss of tourism revenues in 2022 and beyond.
- The Counties Tourism Office should ensure that it has a seat at the table created to address the labour bottleneck to advocate for the support that may be required by the tourism industry. This may include supporting topics like benefits and/or retirement plans for people in tourism and making it more attractive for younger tourism workers to be part of the tourism industry as well as opportunities to explore and leverage new tourism business models and digital solutions.

## Timeframe/Trigger

- Short-term (6-12 months)

## Roles

- Counties Tourism Office (co-lead)
- Leeds Grenville Economic Development Office (co-lead)
- Regional Tourism Organization 9 (co-lead)
- Federal Government (co-lead)
- Leeds Grenville DMOs/municipalities (support)
- Tourism HR organizations (support)
- Local employment agencies (co-lead)

## Tactical Actions

- Identify existing committees focused on addressing labour bottlenecks and explore ways to increase collaboration and plans for implementation of possible management strategies.
- Communicate with key tourism stakeholders, role taken on labour committee, and strategies being undertaken to support labour bottlenecks, along with regular status of outcomes so that tourism stakeholders are aware of related initiatives to leverage for their own businesses.

## Outcomes

- Detailed tourism labour strategy and plan to address immediate labour bottleneck
- Increased tourism labour participation in 2022 and beyond
- Increased number of tourism businesses adopting digital/technology models

DESTINATION DEVELOPMENT PLAN

# Initiative 8: Improve and Share Tourism Product and Experience Inventory with Key Tourism Stakeholders

QUICK WIN

## Rationale/Description

- The pandemic has caused many businesses to shutter or change the way they serve patrons over the last two years.
- The Counties Tourism Office should work with regional DMOs to update and maintain the ongoing inventory of businesses in the region, identifying potential under-utilized assets, gaps, and opportunities for tourism business, product, and experience development.
- The Counties Tourism Office and tourism leaders across the region should focus on identifying potential for regional tourism products and experiences, regional routes and trails, off-peak tourism products and experiences, and regional tourism infrastructure needs, to ultimately support development of regional tourism packages, itineraries, and routes (see **Initiative 9, 10, and 11**), and in alignment with identified visitor needs collected during research (see **Initiative 4**).
- Additionally, this initiative should support identification of tourism businesses that would benefit from, and should consider ways of adapting to digital technology models, as appropriate.

## Timeframe/Trigger

- Short-term (6-12 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville Economic Development Office (support)
- Leeds Grenville DMOs/municipalities (support)

## Tactical Actions

- Conduct and maintain a regionally-focused inventory and gap analysis of tourism products and experiences.
- Identify, communicate, and collaborate with potential tourism businesses that would benefit from, and should consider ways of adapting to digital technology models, as appropriate.
- Explore ways to share data with stakeholders through online solutions.

## Outcomes

- Detailed tourism inventory and analysis
- Improved awareness by tourism stakeholders of tourism operations in the region
- Increased number of tourism businesses adopting digital technology models

DESTINATION DEVELOPMENT PLAN

# Initiative 9: Create Desired Packages, Itineraries, and Routes

## Rationale/Description

- Regionally, there is a lack of products and experiences that are packaged to enable potential visitors to easily find what they are looking for and support promotions across their path to purchase.
- There is an opportunity for the Counties Tourism Office to fill this void, based on information collected in **Initiative 8**, and market research collected in **Initiative 4**, to create a host of package, itinerary, and route options, focusing on 1, 2, 3, and 5-day trips for various market segments. While early research indicates an opportunity to focus on developing options centered on the following topics, other topics such as agri-tourism, industrial tourism, cruise, and film tourism should be explored as resources become available, or as the tourism context evolves (see **Appendix F** for additional descriptions and examples):
  - Flavour Trail
  - Scenic Drives
  - Village Charms
  - River Route
  - Hiking/Walking/Garden Trails
  - Waterways & Parks
- Together with tourism organizations across the region, the Counties Tourism Office should initially aim to create diverse, inclusive, sustainable, and highly sought-after packages, itineraries, and routes. Additional focus may be placed on Indigenous and environmentally-friendly experiences.

## Timeframe/Trigger

- Short-term (6-12 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)

## Tactical Actions

- Work with product development specialist (internal or external) to focus on creating initial unique, yet market-ready tourism packages, itineraries, and routes.
- Outline a detailed product development plan focused on creating a minimum of three regional packages, itineraries, and routes for first year, evaluating them, and building additional options every year or season thereafter. Ensure to build reporting structure for operators to share results and feedback.
- Market and communicate package, itinerary, and route options targeting identified markets (see **Initiatives 16, 17, and 18**).
- Work with various partners (see **Initiative 3**), such as travel trade partners and online tour operators, to promote tourism packages, itineraries, and routes.

## Outcomes

- Increased number of packages, itineraries, and routes
- Increased awareness and tourism revenues generated from visitation through packages, itineraries, and routes

DESTINATION DEVELOPMENT PLAN

# Initiative 10: Develop Uniquely Leeds Grenville Elite Packages, Itineraries, and Canadian Signature Experiences

## Rationale/Description

- Beyond support in creation of regional packages, itineraries, and routes (see **Initiatives 9 and 10**), over time, the Counties Tourism Office should also consider creation of more elite, high-yield, Leeds Grenville experiences that are unique to the Counties and may be positioned to be included as part of Canada’s Canadian Signature Experiences (CSEs) – experiences that visitors (and community members) would be unable to experience anywhere else in the world.
- Leeds Grenville regional tourism has an opportunity to leverage existing work and research to create or enhance additional high-yield CSEs (see **Initiative 8**), that consider shifting visitor values, demographics, and psychographics (see **Initiative 4**). This enables the region to promote outstanding new products and experiences to visitors specifically seeking out higher-yield experiences, generating additional tourism revenues.
- While the previous initiative aims to package market-ready experiences, uniquely Leeds Grenville packages and itineraries should aim to develop packages and itineraries that are strategically aligned with identified priorities such as shoulder/winter packages and itineraries, as well as packages and itineraries that would entice QC, U.S., and international markets. See additional examples in **Appendix F**.

## Timeframe/Trigger

- Medium-term (12-24 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)

## Tactical Actions

- Work with product development specialist (internal or external) with package and itinerary development experience to explore, create, and communicate uniquely Leeds Grenville elite experiences and CSEs.
- Outline a detailed product development plan for elite experiences and CSEs focused on creating building a minimum of three regional packages and itineraries by year 3.
- Market and communicate package and itinerary options targeting identified markets (see **Initiatives 16, 17, and 18**)
- Work with various partners (see **Initiative 3**), such as travel trade partners and online tour operators, to promote elite and CSE tourism packages and itineraries.

## Outcomes

- Increased number of elite experiences that are unique to Leeds Grenville
- Increased number of CSEs in Leeds Grenville
- Increased awareness and tourism revenues generated from Leeds Grenville elite experiences and CSEs

DESTINATION DEVELOPMENT PLAN

# Initiative 11: Identify and Support Enhancement and Development of Regional Tourism Infrastructure

## Rationale/Description

- Tourism stakeholders from across the region cited the lack of tourism infrastructure to support visitation such as public transportation, boat docks and ramps, washrooms, parking, Wi-Fi, electric vehicle charging stations, among others – primarily because it is too costly for individual municipalities to address on their own.
- Additionally, there is a tremendous amount of under-utilized infrastructure that can be better leveraged to ensure higher ROI for the communities in which they exist, while also enhancing the visitor experience.
- This initiative focuses on collecting data on existing and upcoming tourism infrastructure throughout the region, mapping it, and identifying areas where there may be potential gaps in infrastructure.
- A particularly important area of focus for regional tourism infrastructure investment is around transportation to enable those without vehicles to get around the Counties, including marine areas and infrastructure to support more-on-the water experiences and activities (e.g., kayaking, sailing, paddleboarding, etc.), and water access (e.g., launches, docks, and marinas).
- This initiative may be conducted in tandem with the one outlined in **Initiative 8**.

## Timeframe/Trigger

- Long-term (24+ months)

## Roles

- Leeds Grenville DMOs/municipalities (co-lead)
- Leeds Grenville Economic Development Office (co-lead)
- Counties Tourism Office (support)

## Tactical Actions

- Working with local DMOs and municipalities, identify list of infrastructure projects across the region to create prioritization assessment and determine the ones most likely to have greater ROI (financially, socially, and for the environment).
- Work with partners to support development of the business case for identified infrastructure investments (potentially in alignment with **Initiative 7**), and advocate for, and implement infrastructure projects.

## Outcomes

- Increased tourism infrastructure across Leeds Grenville
- Increased satisfaction with visitor experience
- Increased revenues from longer stays

DESTINATION DEVELOPMENT PLAN

# Initiative 12: Improve Wayfinding Opportunities

QUICK WIN

## Rationale/Description

- Engagement and analysis leading up to the development of the Regional Tourism Destination Strategy identified supporting wayfinding initiatives as an immediate, high-impact initiative of the Strategy while also being relatively easy to implement.
- Wayfinding consists of building awareness of tourism-related offerings such as food and beverage, attractions, and other points of interest, while also informing visitors of places they can rest, find washrooms, connect to the internet, or even charge their electric vehicles.
- In today's age of technology wayfinding goes beyond just having physical signage (although that is still required, especially for the drive market). The use of technological solutions is imperative to ensuring visitors, as well as community members, can connect and improve their awareness of opportunities in the area.
- This initiative focuses on identifying ways to improve way-finding opportunities throughout the region in a high-standard (i.e., design and quality), equitable, and inclusive way.

## Timeframe/Trigger

- Medium-term (12-24 months)

## Roles

- Leeds Grenville DMOs/municipalities (co-lead)
- Leeds Grenville Economic Development Office (co-lead)
- Counties Tourism Office (co-lead)

## Tactical Actions

- Working with local DMOS, identify a list of wayfinding opportunities across the region and create prioritization assessment to determine those most likely to have greater returns both financially and for the community.
- Work with partners to support development of the business case for identified wayfinding work.

## Outcomes

- Increased tourism infrastructure across Leeds Grenville
- Increased satisfaction with visitor experience
- Increased revenues from longer stays

# PILLAR 3 INITIATIVES: DESTINATION MARKETING & COMMUNICATIONS



DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 13: Build a Leeds Grenville Tourism Marketing Collective that Includes Brand Development

## Rationale/Description

- Some tourism stakeholders are supportive of the Counties role in tourism management, development and marketing – some are not.
- The success of the marketing effort is reliant on building trust and cooperation among stakeholder groups to ensure that they see themselves in the marketing, that they feel the marketing is strengthening their own efforts, and that it is bringing communities together for common good.
- A collective of destinations, operators, and organizations will help to improve tourism performance and encourage the view of regional tourism as an opportunity to grow number of visits, length of stay, spending, and dispersion throughout the region.
- Marketing as a group can help move ‘the needle’ – otherwise everything remains the same.
- Brand development is needed to build tourism culture and community – internal audience is the focus for initial brand efforts (see **Appendix G**).

## Timeframe/Trigger

- Immediate (12 months)

## Roles

- Counties Tourism Office (co-lead)
- Leeds Grenville DMOs/municipalities (support)
- Tourism marketing committee (co-lead)
- Public and private sector organizations (support)

## Tactical Actions

- Set up a tourism marketing collective (or committee) for ongoing input, guidance and direction.
- Meet regularly to get updates from various participants, address challenges, and leverage learnings.
- Adopt and execute brand recommendations.

## Outcomes

- Effective implementation of the tourism marketing and communications plan
- Effective implementation of the brand recommendations

DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 14: Develop Digital Tourism Channels to Serve the Region

## Rationale/Description

- A dedicated tourism website will better serve potential visitors and locals – with enhanced search optimization, faster page speed, and dynamic content (see media approach in **Appendix H** and audience profiles **Appendix I**)
- The website becomes the hub of digital content – destination websites are a key source for awareness and inspiration.
- Operator listings are a thing of the past – drive consumers directly to operator websites as quickly as possible.
- Social channels are the number one source for travel information – the channels and content formats continue to evolve (see media approach in **Appendix H**).
- A plan must be put in place to establish channels – Facebook, Instagram, YouTube are priority for year one with Tik Tok and Pinterest presenting future opportunities.
- Introduce a consumer newsletter that mirrors the economic development version (several comments noted it was highly regarded and well-read). This will also serve to engage residents (see media approach **Appendix H**).
- Channels need to be updated frequently.

## Timeframe/Trigger

- Immediate (6-12 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)

## Tactical Actions

- Secure/identify funding for website build and build RFP/scope of work for new website.
- Secure/identify funding for development of a content strategy and ongoing execution.
- Establish sustained annual budget for asset development including photography and video content.
- Determine roles/responsibilities for web and social content management.

## Outcomes

- Number of impressions delivered
- Number of follows/shares/clicks to operators
- Leads sent to operators through digital channels
- Consumer newsletter sign-ups and open rate
- Search engine rankings and growth in organic search

DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 15: Build a Regional Tourism Content Marketing Program

## Rationale/Description

- “Today’s audiences want to hear the depth of your story and understand why you exist. Authenticity rules the day” - Tara Walpert-Levy, Managing Director, Google.
  - A content marketing program will help cultivate engagement from residents and local businesses.
  - Content can be deployed across multiple channels in multiple formats and be repurposed for various audiences.
  - Tracking search volumes and keywords helps shape content direction and focus – giving consumers what they seek.
  - Content marketing allows shining light on local experiences, businesses and residents – off the beaten track, support small business, generate a sense of community. Contributors can be selected based on interest, following, trust and influence.
  - Content can help build trust, keep people engaged, improve conversion and enhance visibility online.
  - Destination ON and RTO9 have moved into content marketing as their primary method to reach and influence customers – we can feed into their content system.
  - Once the program has been running for 12-18 months consider adding niche/experience themed campaigns that bring together operators from across the region (such as paddling, hiking, camping, farm visits).

## Timeframe/Trigger

- Immediate (6-12 months)
- Ongoing

## Roles

- Counties Tourism Office (co-lead)
- Tourism Marketing Committee (co-lead)

## Tactical Actions

- Secure/determine funding for development of a content strategy and ongoing execution to establish themes, pillars and a content calendar.
- Undertake an SEO audit to assist in plan development (outsource as needed).
- Establish sustained annual budget for asset development including photography and video.
- Determine roles/responsibilities for web and social content management.
- Establish sustained annual budget for paid media support.

## Outcomes

- Search engine rankings and growth in organic search
- Number of impressions delivered
- Number of follows/shares/clicks to operators from digital channels
- Leads sent to operators through digital channels

DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 16: Focus on Local Engagement

## Rationale/Description

- “The key to destinations’ successes long-term points to this: the industry engaging with host communities, and tourism boards and businesses catering to residents as their primary customer.”
  - The Counties is made up of a collective of passionate, engaged residents that care about their home. They are invested in its future and in how it is shared with visitors.
  - Friends and relatives are the primary source of information for travel – they carry influence and are the top motivator for tourism.
  - The pandemic forced Canadians to travel closer to home and to discover their own backyard. This is widely accepted as the new normal for travel. Our residents are our best source market.
  - Ongoing engagement and investment in reaching locals will further pride and equity in the region and provide a two-way channel for communication.

## Timeframe/Trigger

- Immediate (0-6 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)
- Public and private sector (support)
- Community organizations (support)

## Tactical Actions

- Set up a Locals Know stream of content – consider local spokespeople to share the Counties plans.
- Develop an ongoing communications and marketing plan targeting residents and seek local media partnerships.

## Outcomes

- Number of local impressions delivered
- Number of follows/shares/clicks to operators
- Leads sent to operators through digital channels
- Newsletter sign-ups and open rate

DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 17: Prioritize Near Domestic Markets (ON and QC)

## Rationale/Description

- There is an opportunity to grow visitation from QC and ON markets – number of visits, length of stay, number of destinations visited.
- Awareness for most destinations beyond 1000 Islands is limited, there is opportunity to build awareness through itinerary/route development.
- The QC market has been identified as a priority based on proximity, ease of travel and alignment of experiences (outdoor, boating, food/drink).
- ON is currently the largest source market for visitors – the Counties region provides a close and easy destination for rest, relaxation, and connection to nature and natural beauty.

## Timeframe/Trigger

- Immediate (0-6 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)
- Public and private sector (support)
- Community organizations (support)

## Tactical Actions

- Incorporate a QC component into the owned/earned and paid media strategies including French language assets. For cost efficiency, the tourism website can use Google translate..
- Introduce new ways to experience the region through itineraries/routes.
- Consider development of a bilingual newsletter in coming years

## Outcomes

- Number of impressions delivered
- Number of follows/shares/clicks to operators  
Leads sent to operators
- Newsletter sign-ups and open rate
- Search engine rankings and growth in organic search

DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 18: Reconsider U.S. and International Opportunities

## Rationale/Description

- The Counties should assume the lead representation role for the region in partnership with U.S. marketing initiatives with the Thousand Islands Council.
- Investigate and collaborate on cross-border partnership and promotional initiatives.
- International opportunities exist through partnership with Destination Ontario and gateway cities.
- Consultation with trade operators and Destination Ontario to build a plan for trade-ready product development (the itinerary/route initiative may be enough to get started in the short term).
- Neighbouring destinations active in trade are partners, not competition – build and nurture relationships with Cornwall, Kingston, and Ottawa for broader promotion of Eastern Ontario – can itineraries be co-built, can we be represented through their efforts.

## Timeframe/Trigger

- Immediate (0-6 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)

## Tactical Actions

- Create an industry trade strategy – supported in part by the development of trade-ready itineraries.
- Build a trade-ready plan for operators – work closely with RTO on the delivery of education and training as needed.

## Outcomes

- Number of impressions delivered through marketing efforts (paid, earned and owned)
- Number of follows/shares/clicks to operators
- Leads sent to operators through digital channels

DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 19: Establish Online Distribution and Sales Support

## Rationale/Description

- Online travel agents, deal sites and Trip Advisor are relevant across the consumer planning/booking journey – from awareness, engagement and conversion.
- The environment is dynamic and smaller operators may not be optimized.
- Many of the Counties operators are not leveraging these digital channels to their maximum benefit – the Counties can help to educate and nurture this (Google is the primary channel to optimize as it is the starting point for most trip planning).
- Niche tour operators may provide immediate opportunities for promotion of the Counties experiences.

## Timeframe/Trigger

- Short-term (6-12 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)
- Public and private sector (support)
- Community organizations (support)

## Tactical Actions

- Identify potential trade partners by niche, reach and audiences.
- Share itinerary/route with travel trade partners in advance of going live – What’s missing? What’s needed? Adjust and refine as needed.
- Build a trade-ready plan for operators – work closely with RTO9 on the delivery of education and training as needed.

## Outcomes

- Number of impressions delivered
- Number of follows/shares/clicks to operators
- Leads sent to operators through digital channels

DESTINATION MARKETING & COMMUNICATIONS PLAN

# Initiative 20: Support a Multi-Channel Visitor Services Program with Focus on Operators

## Rationale/Description

- Visitors seek information from a variety of sources in a complex ecosystem:
  - Mobile/on-line : Social media, Web searches, Review sites, Booking sites, Destination content
  - Person-to person: Local ambassadors, Visitor Centres, Front Line Staff
- Leeds Grenville Tourism Office needs to coordinate and align with RTO9, DMO and Destination Ontario visitor services offerings.
- Training in customer service and product knowledge is needed for all front-line staff. This feeds into the growth of a tourism culture – to create a sense of place for visitors, a sense of welcome, and collaboration among tourism operators.
- Social media is the primary digital channel to provide real-time visitor services - it is the “always on” customer service channel and will need to be managed accordingly.

## Timeframe/Trigger

- Short-term (6-12 months)
- Ongoing

## Roles

- Counties Tourism Office (lead)
- Leeds Grenville DMOs/municipalities (support)
- Regional Tourism Organization 9 (support)

## Tactical Actions

- Create and optimize digital tools to engage with visitors across all channels, consider building an online hub for partners to upload materials to be shared, a QR code program to promote itineraries/routes.
- Be prepared to respond to individual requests through social media.
- Review existing visitor service centres and seek opportunities for distribution of QR code posters/rack cards/signage.
- Promote the value of a regional approach to sharing content, recommendations and travel information to stakeholders.
- Encourage residents to engage with visitors and share their recommendations.

## Outcomes

- Number of engagements with visitors
- Number of front line participants in training
- Leads sent to operators through digital channels
- QR Code downloads

# Appendix A: Leeds Grenville Tourism Today (Global, Domestic, & Local Trends)



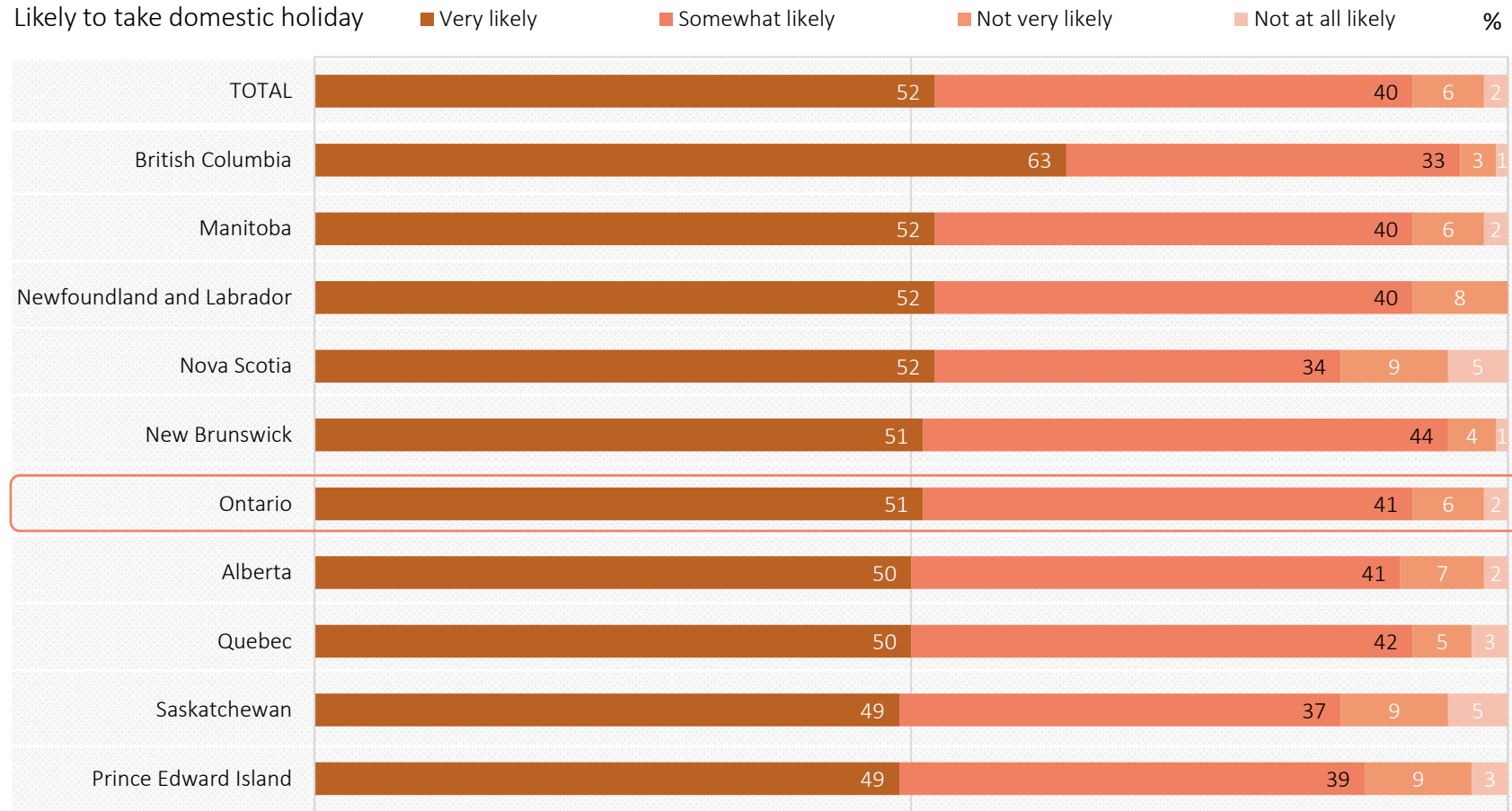
# Global Trends: 2022's Top 10 Trends Shaping the Future of Tourism

Trend	Regenerative travel going local	Experiences are the new luxury	Single destination, longer stays	Remote work creates a new definition of tourism	Wellness for all
Description	<p>Regenerative travel will support tourism as a key pillar for sustainable economic development for destinations - 83% of global travellers will make sustainable travel a priority in the future, while 66% want their travel spending to directly benefit local communities.</p>	<p>The value of travel and tourism will increase even more in 2022, boosting consumer spending towards unique travel experiences. The lack of travel caused by the COVID-19 pandemic has turned tourism into a scarce, luxury good.</p>	<p>The complexity of arranging a trip pre and post testing, differing vaccine passport protocols and the uncertainty of new COVID-19 waves will result in travellers booking fewer trips but increasing the length of their stay and in a single country – ‘Travel less, travel better’ will determine booking behaviour this year.</p>	<p>An emerging trend since COVID-19; remote work is here to stay. Last year proved that productivity and employee satisfaction increased, while business costs benefited from it as a result of giving the opportunity to temporarily relocate and work in more inspiring surroundings. It is forecasted that 50% of the global workforce will adopt remote or hybrid work models during 2022.</p>	<p>The wellness and spa sector will grow 17% annually through 2025, confirming the increasing appeal of wellness travel within the tourism industry, with up to 76% of travellers wanting to spend more on travel experiences that improve their well-being and mental health.</p>
Key takeaway destination	<p>Destinations betting on nature-based products and activities will take market share from urban destinations that fail to pivot, while giving tourism leadership to the local community will be a differentiator in the global market.</p>	<p>Too many destinations will be competing to attract fewer visitors in the first half of 2022, so designing robust tourism experience strategies will be key to optimize the share of travellers.</p>	<p>A unique opportunity to generate more revenue and disperse demand across the destination and contribute to the economic growth of multiple locations, as well as broadening the range of products and experiences to upsell.</p>	<p>Many destinations have already launched the so-called ‘digital nomad visas’ - Portugal, Spain, Barbados, Costa Rica, Estonia – to capture demand of high-income travellers and workers seeking a much more immersive destination experience. Investment in reliable high-speed internet infrastructure will be key to succeed and opens the door to flatten seasonality.</p>	<p>Capitalizing on existing wellness assets and experiences, as well as designing and implementing marketing strategies to boost this segment should be a priority.</p>

# Global Trends: 2022's Top 10 Trends Shaping the Future of Tourism

Trend	Health & Safety is standard	Tourism labour becomes the bottleneck	Inspiration from streaming & social media	Business travel comeback	International travel will overtake domestic, finally
Description	<p>70% of travellers say that respect for COVID-19 safety guidelines and restrictions is important when deciding on a travel brand, resulting on travellers now feeling safer when health-focused measures are in place in eating, shopping, and tourism locations.</p>	<p>Demand for labour in hospitality remains strong, but hospitality workers finding other careers due to COVID-19 industry disruption and demographic trends will drive a long-term worker shortage severely impacting service, availability of hotel rooms and other tourism experiences.</p>	<p>Watching Tik Tok and Instagram influencers create or push inspirational travel content is no longer a niche, while streaming services like Netflix and HBO provide new endless opportunities to create destination awareness – think Game of Thrones for Dubrovnik from 2010 and beyond to White Lotus for Hawaii in 2021.</p>	<p>Business travel is one of the most impacted tourism verticals, but will begin its recovery in 2022. It is unlikely that travelling for work-related purposes will come back to pre-COVID-19 levels, mainly due to changes in worker behaviour and demand, efficiency, technology and sustainability. However, physical meetings will become more important as 72% of business travellers are eager to travel.</p>	<p>Domestic holidays will still be important as travel restrictions remain in place at the beginning of 2022, but their appeal will wean in favour of pent up demand for international travel. Only 18% of travellers would prefer a domestic rather than an international holiday, with international travel spending expected to rise a 94% in 2022.</p>
Key takeaway destination	<p>Consumer demand for high levels of health and safety checks require destinations to invest in order to meet those effectively and build a key brand differentiator.</p>	<p>Improving childcare, managing health risks and rising wages are among the initiatives destinations could focus on, as well as upskilling of the local tourism workforce and developing campaigns to engage future labour into tourism.</p>	<p>Partnerships with streaming services and social media influencers will need a higher investment from destinations in order to build a strong brand, giving tools to local storytellers to showcase the destination's culture to the global stage.</p>	<p>The growing trend to combine business travel with stay extensions for holiday purposes gives destinations a wider range of touchpoints to engage with this traveller segment.</p>	<p>It is time to dust off the strategy plans to capitalize on the international markets. However, the domestic market proved to have untapped potential during the pandemic and should not be underestimated moving forward.</p>

# Likelihood to Take Vacation in Canada



# Resident Sentiment: ON

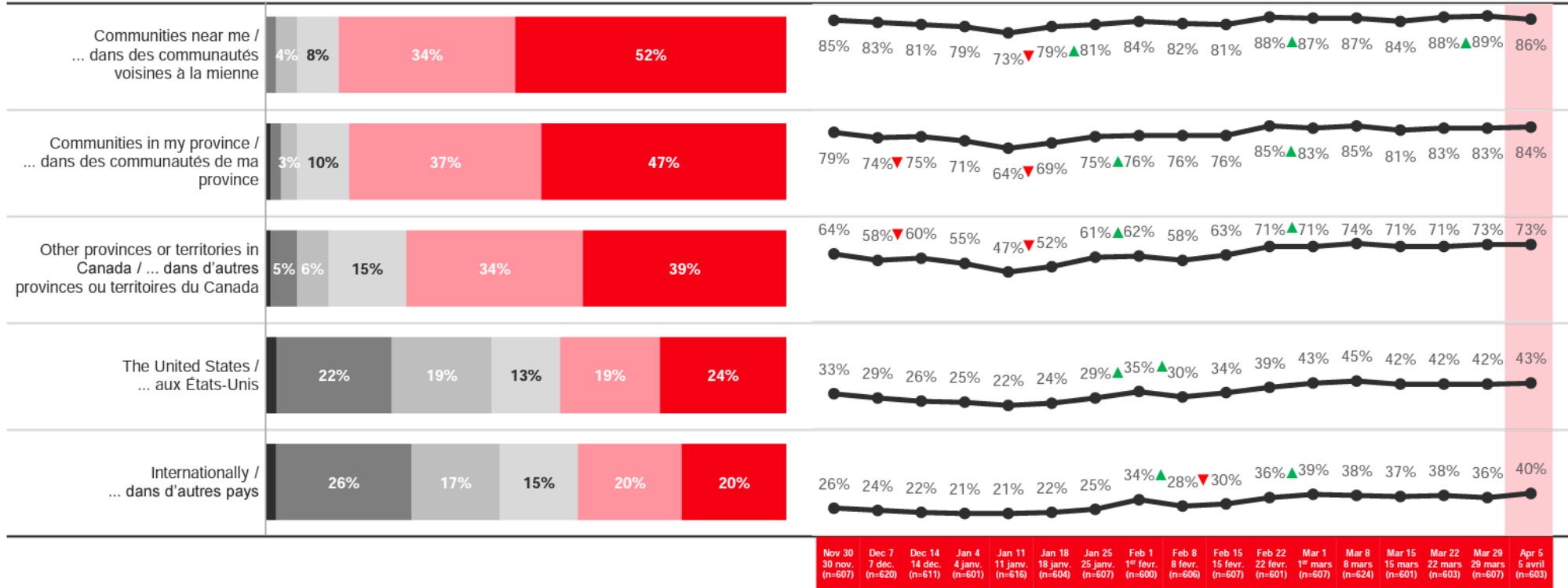
I feel safe to travel to...

April 2022

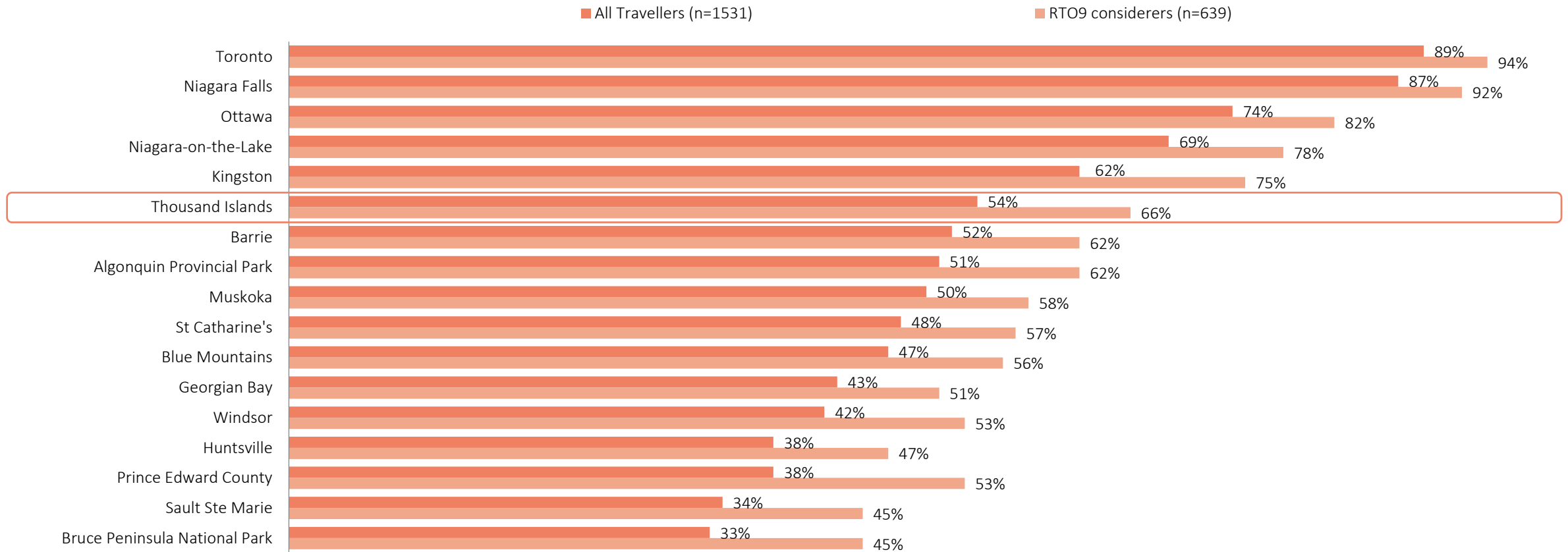
- Don't know / Je ne sais pas
- Strongly disagree / Pas du tout d'accord
- Somewhat disagree / Plutôt en désaccord
- Neither agree nor disagree / Ni d'accord ni en désaccord
- Somewhat agree / Plutôt d'accord
- Strongly agree / Tout à fait d'accord

## Trending / Tendence

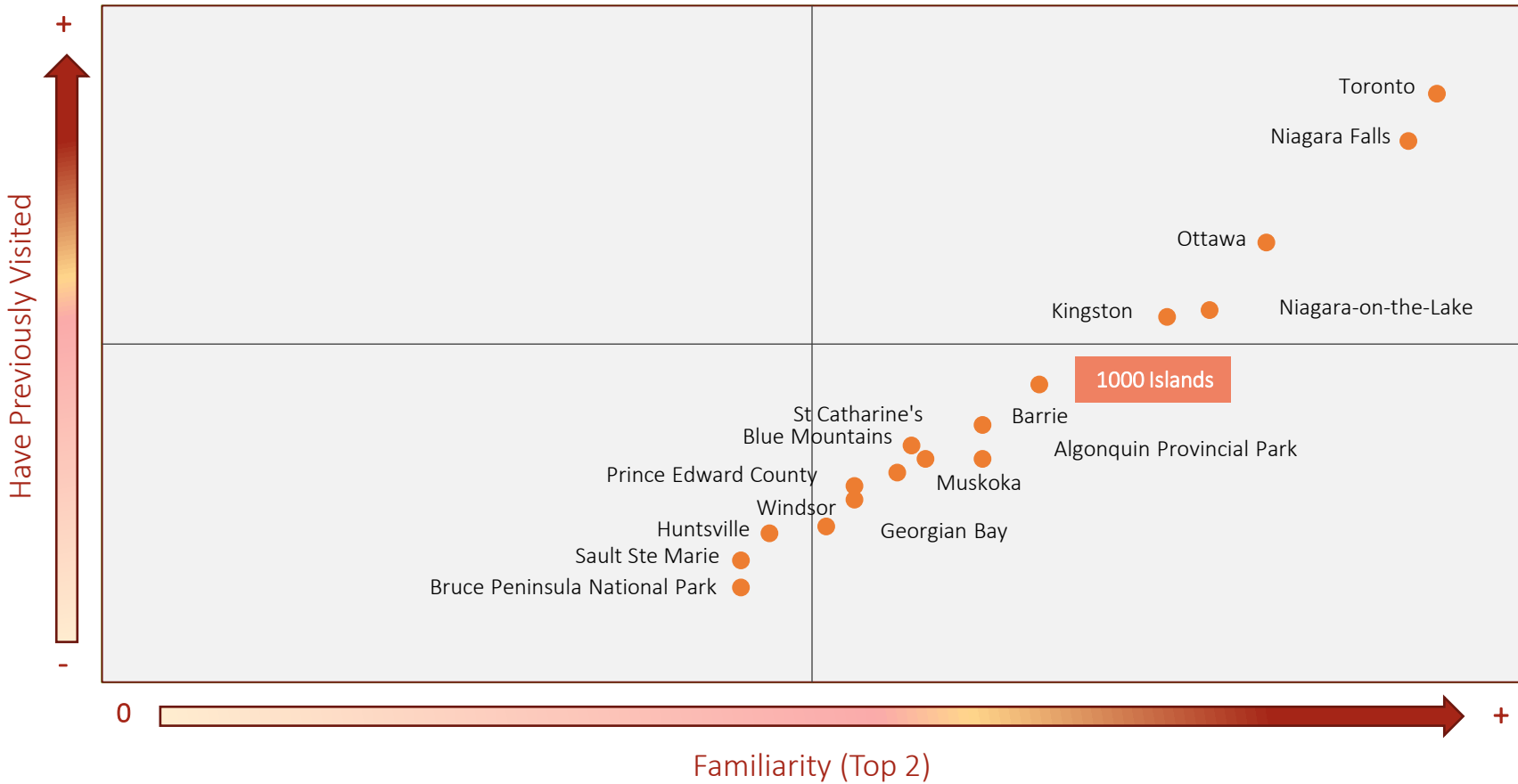
% Somewhat / Strongly Agree / % Tout à fait d'accord / Plutôt d'accord



# Familiarity with Destinations: ON



# Destination Familiarity and Previous Visitation: ON

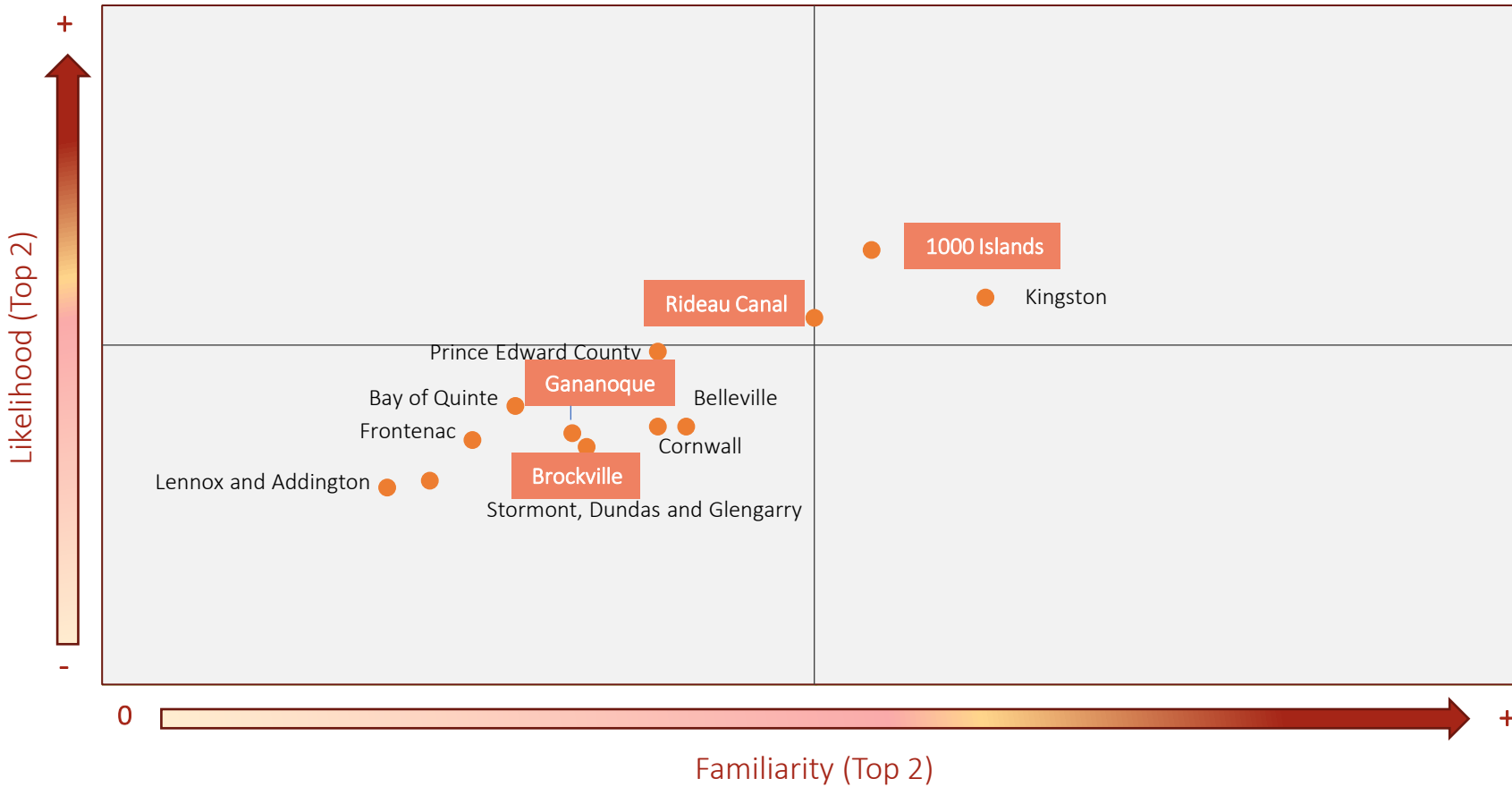


## KEY IMPLICATIONS

- 1000 Islands is the only destination in the Counties represented.
- There is a clear link between the two measures of destination profile, as the destinations people feel most familiar with are also those they are more likely to have visited in the past.
- Kingston and Prince Edward County are the other South Eastern Ontario destinations represented, with Kingston ranking slightly higher than 1000 Islands.

Source: Twenty31 – RTO9 (South Eastern Ontario) consumer perception research, February 2021  
 Base: ON & QC, n=639  
 Q8: How familiar, if at all, are you with the following destinations within ON in terms of what they have to offer for holidays/vacations/leisure travel?  
 Q8a: And which have you visited in the past?

# Destination Familiarity and Likelihood to Visit: South Eastern Ontario



## KEY IMPLICATIONS

- 1000 Islands is the flagship destination in the United Counties of Leeds and Grenville in terms of familiarity and likelihood to visit.
- The municipalities of 1000 Islands are not familiar by name.
- Rideau Canal ranks second in the Counties in familiarity and likelihood to visit.
- Destination likelihood to visit is strongly correlated with destination familiarity

Source: Twenty31 – RTO9 (South Eastern Ontario) consumer perception research, February 2021

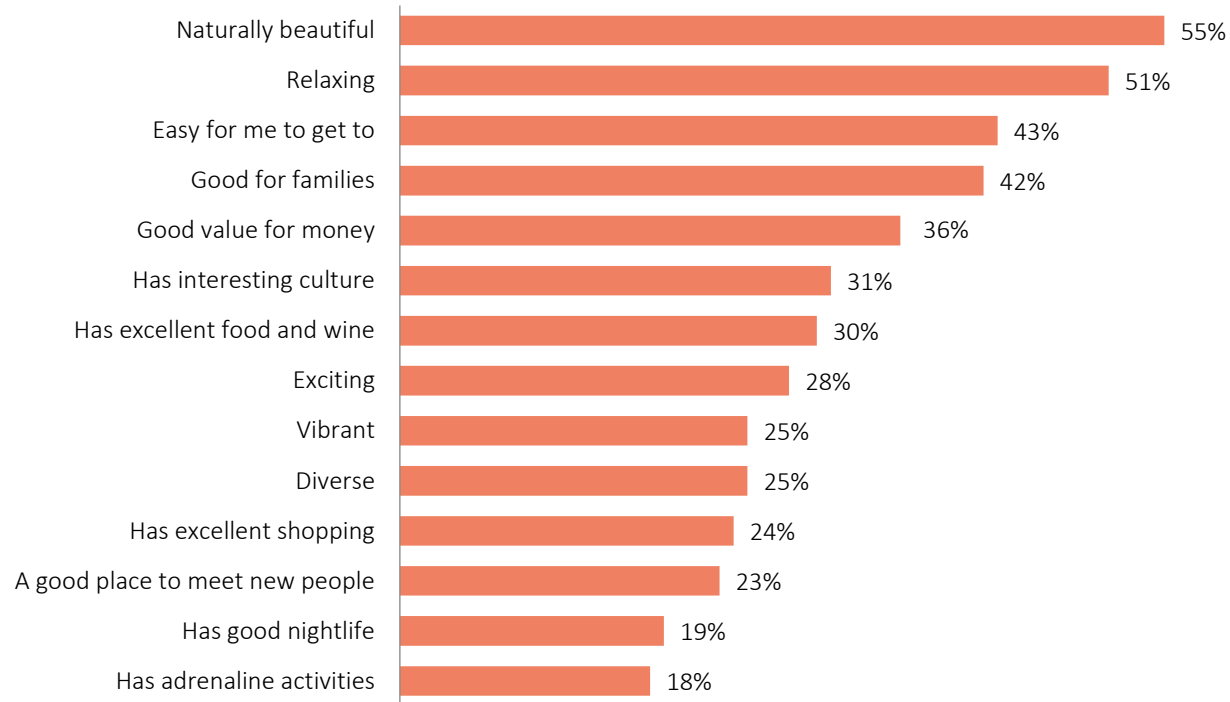
Base: ON & QC, n=1,531

Q12: Here is a list of some destinations within South Eastern Ontario. For each, please indicate how familiar you feel with what that destination has to offer for holidays/vacations leisure travel. Q13: And for each, please indicate how likely you would be to consider that destination for your next vacation within Canada.

# Qualities Associated with Canadian Provinces and Territories

	BC	AB	SK	MB	ON	QC	PE	NB	NL	NS	NT	YT	NU
Naturally beautiful	83	67	50	53	69	65	76	60	70	74	48	51	46
Lots to see and do	62	48	28	32	58	50	47	39	53	60	32	32	21
Easy to get to	60	47	47	34	56	48	47	42	34	58	20	15	12
Family-friendly	56	47	45	43	47	43	54	47	56	55	37	38	32
Lots of outdoor activities	56	45	38	39	44	40	43	41	51	48	39	45	36
Good food and drink	56	41	32	35	46	49	52	38	53	57	25	25	18
Somewhere I can be myself	53	41	36	33	46	36	40	37	49	48	32	30	23
Range of accommodation	51	41	31	33	46	40	40	38	43	52	20	25	16
Easy to get around	48	39	38	29	43	36	47	35	37	49	21	18	12
Exciting	48	33	20	22	43	36	33	29	44	38	31	30	23
Safe and secure	47	38	35	35	40	37	46	41	55	48	31	33	27
Lots of history	47	36	34	36	40	45	40	36	53	48	40	37	29
Relaxing	47	34	34	33	37	31	49	37	50	51	26	26	25
Good weather	47	30	27	25	42	30	37	32	26	42	17	19	15
Good shopping	46	37	20	23	45	39	27	31	31	46	15	13	13
Culturally diverse	46	33	29	31	42	38	28	30	36	41	29	27	24
Authentic	41	32	30	30	30	34	41	36	52	42	37	38	34
Crowded	41	28	14	12	46	36	18	17	20	26	12	10	12
Refined	39	24	19	17	32	30	21	22	28	29	16	16	18
Good value for money	39	33	37	30	35	32	39	35	39	43	19	20	15
Somewhere to gain a new perspective on the world	39	33	31	31	29	33	35	34	51	37	50	47	48
Has a unique culture	37	28	26	31	28	38	35	32	55	39	45	45	42
Romantic	37	24	16	16	28	35	34	22	33	34	19	20	15
Culturally unique	36	25	24	26	25	38	29	28	48	36	37	36	38
Challenging	32	24	20	20	24	24	19	20	36	21	31	33	33

# Qualities Associated with South Eastern Ontario Destinations



## KEY IMPLICATIONS

- Natural beauty, relaxation, accessibility, and suitability for families are the qualities most associated with various destinations within South Eastern Ontario, as well as Leeds Grenville.
- Qualities defining an urban destination (e.g., shopping, nightlife, meeting new people, adrenaline activities) are the least associated to the region, given its rural attributes.

# Qualities Associated with Leeds Grenville Destinations

	Kingston (n=954)	1000 Islands (n=827)	Rideau Canal (n=766)	Belleville (n=630)	Cornwall (n=602)	Prince Edward County (n=591)	Brockville (n=526)	Gananoque (n=504)	Bay of Quinte (n=444)	Frontenac (n=396)	Stormont, Dundas and Glengarry (n=350)	Lennox and Addington (n=307)
Likely to consider?	57%	64%	54%	38%	38%	49%	35%	37%	41%	36%	30%	29%
Familiarity	62%	54%	50%	41%	39%	39%	34%	33%	29%	26%	23%	20%
<b>Most Associated</b>												
Easy for me to get to	31%			32%	28%							
Naturally beautiful	25%	52%	38%			36%	22%	39%	36%	29%	24%	23%
Relaxing		36%	28%	27%	25%	31%	29%	32%	29%	26%	26%	26%
<b>Least Associated</b>												
Diverse		7%										
Has excellent shopping		--	7%					6%				
Has good nightlife	10%	5%	6%	7%	7%	6%	6%	5%	9%	8%	8%	8%
Has adrenaline activities	5%			6%	8%	7%	5%		7%	6%	5%	9%

Source: Twenty31 – RTO9 (South Eastern Ontario) consumer perception research, February 2021

Base: ON & QC, n=1,531

Q12: Here is a list of some destinations within South Eastern Ontario. For each, please indicate how familiar you feel with what that destination has to offer for holidays/vacations leisure travel.

Q13: And for each, please indicate how likely you would be to consider that destination for your next vacation within Canada.

Q14: For each of the destinations within South Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination.

# Attractions in South Eastern Ontario: Profile and Interest

	Have heard of	Would Visit		Have heard of	Would Visit
Kingston 1000 Islands Cruises	55%	50%	Brockville Arts Centre	32%	32%
Sandbanks Provincial Park	54%	48%	Brockville Museum	32%	36%
Upper Canada Village	53%	46%	Cornwall Community Museum	32%	33%
Kingston Penitentiary	48%	36%	Prince Edward County Taste Trail	32%	40%
Thousand Islands National Park	47%	46%	The Grand Theatre, Kingston	32%	34%
National Air Force Museum	46%	36%	The Regent Theatre	32%	34%
1000 Islands Heritage Museum	42%	38%	Big Sandy Bay	31%	36%
Fort Henry National Historic Site	42%	39%	Grills Orchards	31%	30%
Rideau Trail	42%	41%	Huff Estates Inn and Winery	31%	37%
1000 Islands Kayaking	41%	36%	Macaulay Heritage Park	31%	33%
1000 Islands Helicopter Tours	40%	37%	MacKinnon Brothers Brewing Co.	31%	34%
Frontenac Provincial Park	40%	37%	The Cataraqui Trail	31%	35%
OLG Casino Thousand Islands	40%	36%	Westport Brewing Company	31%	32%
Gananoque Boat Line	39%	39%	Batawa Ski Hill	30%	30%
Bon Echo Provincial Park	38%	38%	Frontenac Arch Biosphere	30%	34%
Kingston Trolley Tours	35%	37%	Lennox and Addington County	30%	35%
Prince Edward County Lavender Farm	35%	41%	Dark Sky Viewing Area	30%	35%
The Lost Villages Museum	35%	41%	Le Boat	29%	28%
Thousand Islands Playhouse	35%	37%	Lennox and Addington	29%	32%
Fairfield House	34%	27%	County Museum & Archives	29%	32%
Historic SDG Jail	34%	37%	Agnes Etherington Art Centre	28%	32%
Lamoureux Park	34%	34%	Glanmore National Historic Site	28%	37%
Presqu'île Provincial Park	34%	38%	K&P Trail	28%	32%
Prince Edward County Arts Trail	34%	36%	North Frontenac Dark Sky Preserve	28%	33%
Sandbanks Estate Winery	34%	41%	Parrott's Bay Conservation Area	28%	32%
Brockville Railway Tunnel	33%	34%	Fulford Place	27%	31%
Shorelines Casino	33%	31%	The Blockhouse Museum	27%	33%
			Foley Mountain Conservation Area	26%	34%

## KEY IMPLICATIONS

- Attractions with highest profile among travellers from ON and QC are also those associated with the destinations that are best-known – 1000 Islands and Kingston.
- Awareness is moderate to low for most attractions, with only the 1000 Islands Cruises, Sandbanks Provincial Park and Upper Canada Village known to a majority.
- At the same time, more than a third say they would be interested in visiting most attractions.
- The Counties should consider marketing and promotion initiatives aimed at attractions where stated interest in visiting is relatively high despite lower awareness.

# Top Qualities and Attractions: Leeds Grenville Destinations

1000 ISLANDS	
<b>Top 5 Qualities</b>	
Naturally beautiful	52%
Relaxing	37%
Good for families	26%
Easy for me to get to	21%
Exciting	19%
<b>Top 3 Attractions Likely to Visit</b>	
Thousand Islands National Park	46%
Gananoque Boat Line	39%
1000 Islands Heritage Museum	38%

GANANOQUE	
<b>Top 5 Qualities</b>	
Naturally beautiful	43%
Relaxing	33%
Easy for me to get to	24%
Good for families	19%
Good value for money	18%
<b>Top 3 Attractions Likely to Visit</b>	
Thousand Islands National Park	46%
Gananoque Boat Line	39%
1000 Islands Heritage Museum	38%

RIDEAU CANAL	
<b>Top 5 Qualities</b>	
Naturally beautiful	38%
Relaxing	29%
Good for families	25%
Easy for me to get to	22%
Exciting	17%
<b>Top 3 Attractions Likely to Visit</b>	
Rideau Trail	41%
Foley Mountain Conservation Area	34%
Westport Brewing Company	32%

BROCKVILLE	
<b>Top 5 Qualities</b>	
Relaxing	28%
Easy for me to get to	27%
Naturally beautiful	25%
Good for families	23%
Good value for money	21%
<b>Top 3 Attractions Likely to Visit</b>	
Brockville Museum	36%
Brockville Railway Tunnel	34%
Brockville Arts Centre	32%

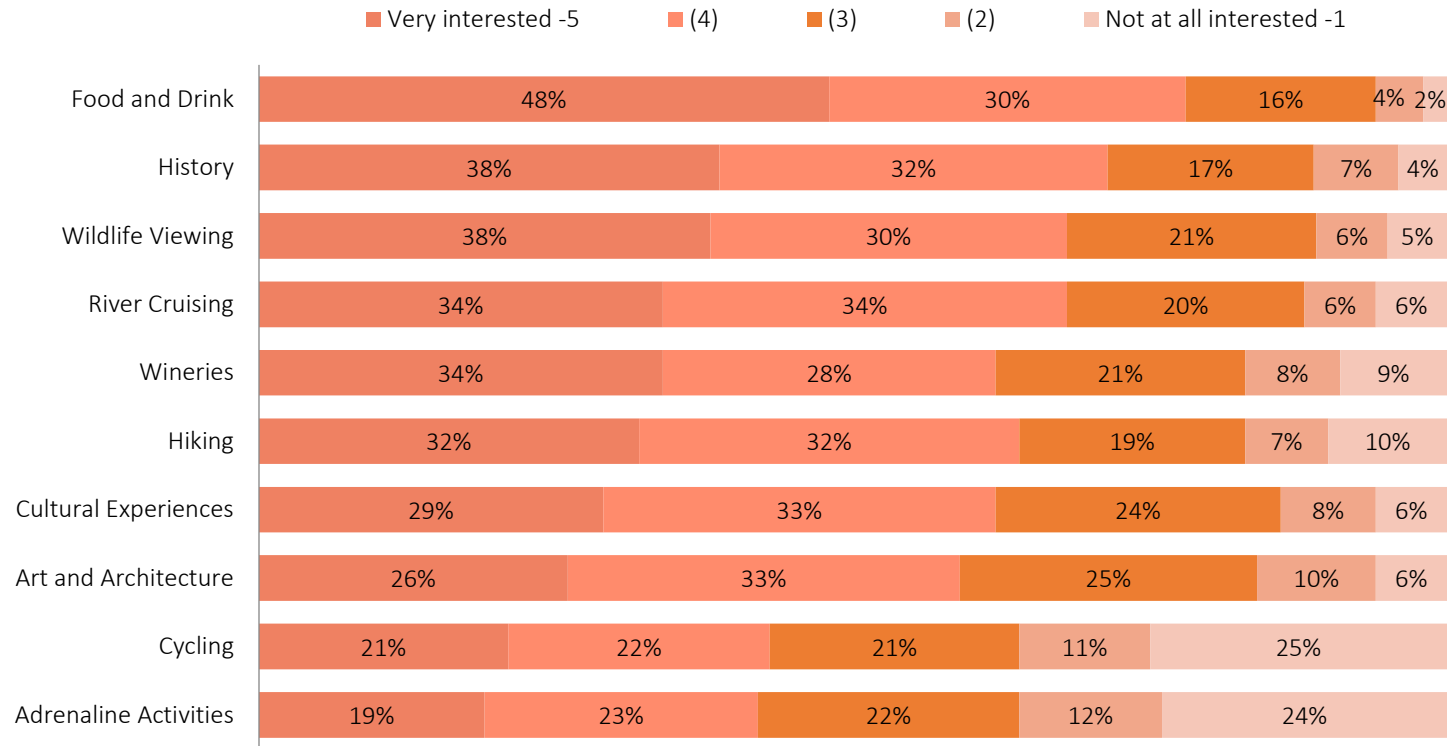
Source: Twenty31 – RTO9 (South Eastern Ontario) consumer perception research, February 2021

Base: ON & QC, n=684

Q25: For each of the destinations within South Eastern Ontario listed below, please indicate which of the following descriptions most strongly apply. You may select up to three for each destination

Q16: And which would you consider visiting on a possible future leisure trip to South Eastern Ontario?

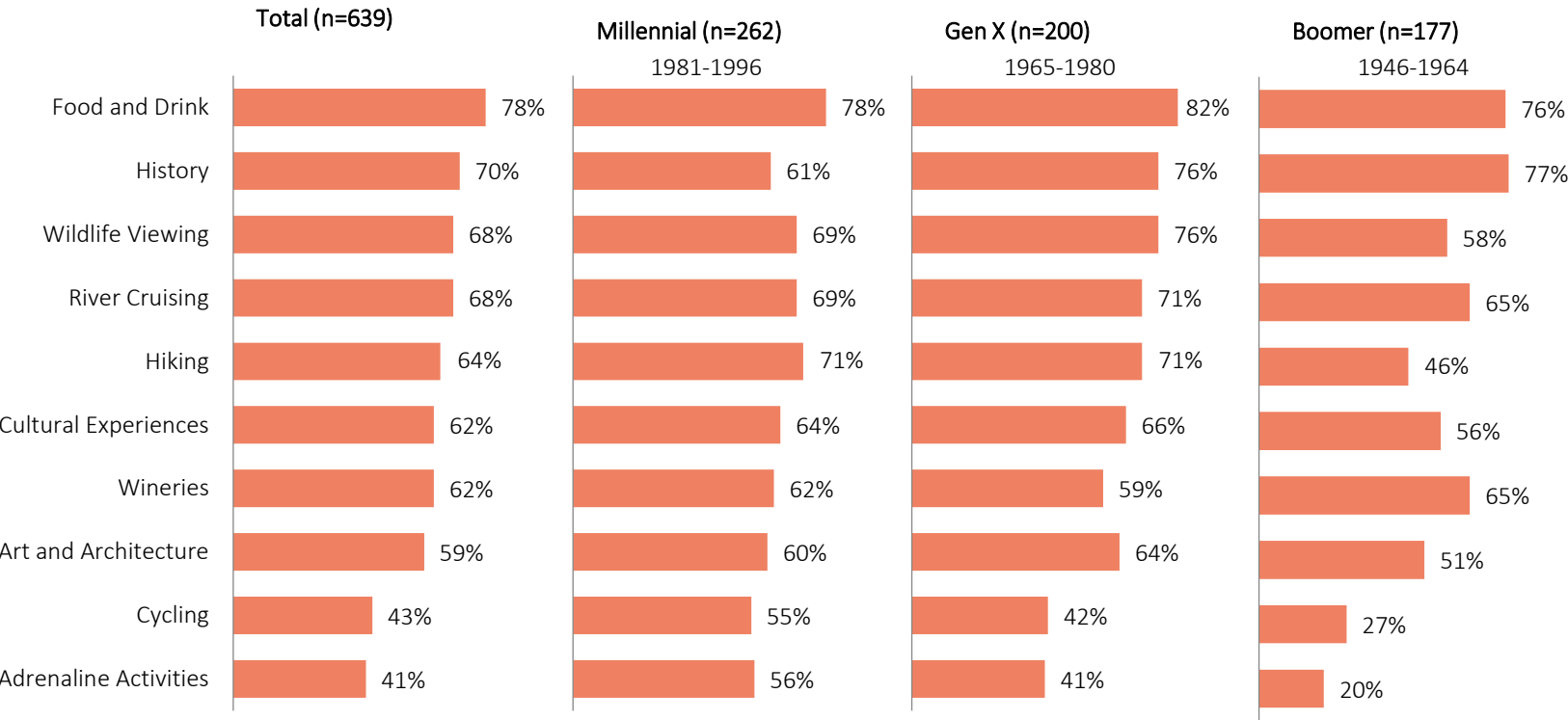
# Interest in Itinerary Types: South Eastern Ontario Considerers



## KEY IMPLICATIONS

- Nearly half of South Eastern Ontario potential visitors are very interested in Food and Drink.
- History, Wildlife Viewing, and River Cruising are also highly attractive experiences, followed by Wineries and Hiking.
- Leeds Grenville product proposition caters perfectly to these itinerary preferences.
- Interest is significantly lower for active experiences:
  - Cycling: 25% not interested at all
  - Adrenaline activities: 24% not interested at all

# Interest in Itinerary Types: South Eastern Ontario by Generation



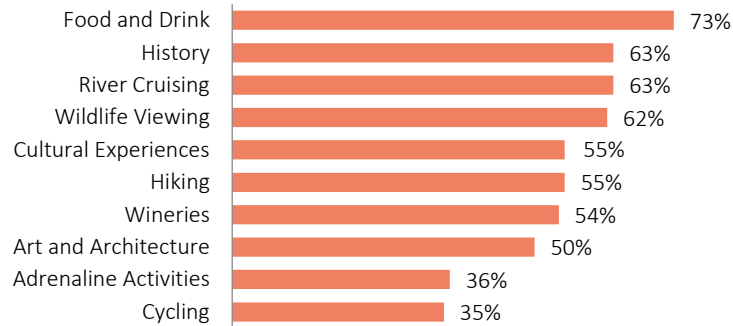
## KEY IMPLICATIONS

- Interest in the most active itinerary types is strongly linked with age – over half of Millennial potential visitors to South Eastern Ontario are interested in cycling (55%) and adrenaline activities (56%).
- Food and drink and cultural experiences are popular across all generations.
- The Counties are well-positioned to segment their product offering by age group to maximize visitor experience and spending.

# Preferred Vacation Activity Type: Leeds Grenville Destinations

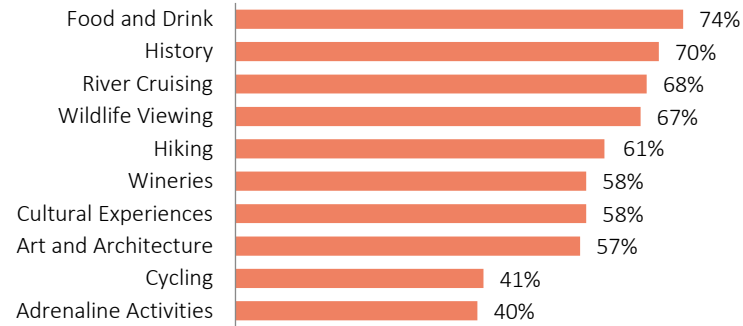
## 1000 ISLANDS

Top vacation activity type



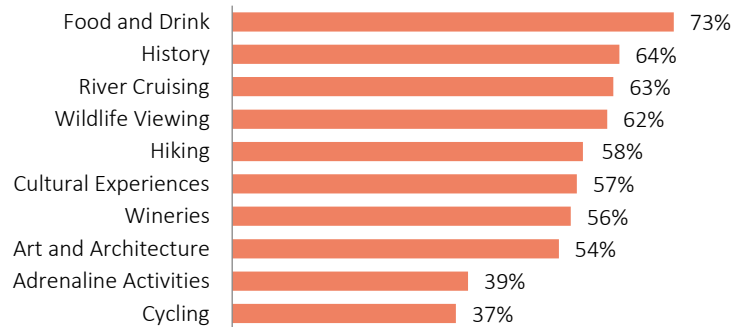
## GANANOQUE

Top vacation activity type



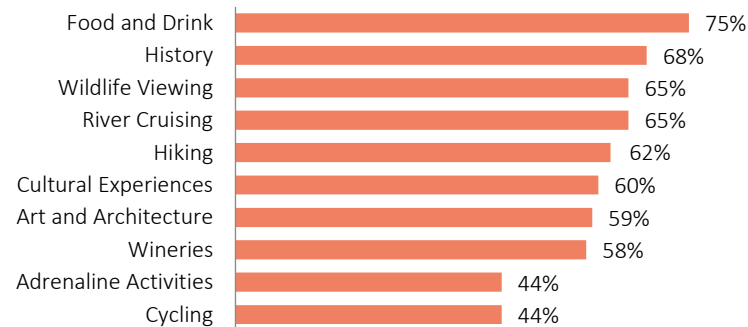
## RIDEAU CANAL

Top vacation activity type



## BROCKVILLE

Top vacation activity type



## KEY IMPLICATIONS

- Food and Drink is the preferred vacation activity type in Leeds Grenville, with three quarters of potential travellers considering it their favourite experience.
- History, River Cruising and Wildlife Viewing follow across destinations.
- Adrenaline Activities and Cycling are not appealing activities to those travellers considering Leeds Grenville for visitation.

Source: Twenty31 – RTO9 (South Eastern Ontario) consumer perception research, February 2021

Base: ON & QC, n=574

Q15: Thinking about a possible future trip to South Eastern Ontario, how interested, if at all, would you be in a vacation focused on the following types of activities?

Please use the scale below, where 1 means you would not be at all interested in that type of vacation within South Eastern Ontario, and 5 means you would be very interested

# Priorities when Choosing Vacation Destination within Canada in Spring/Summer 2022



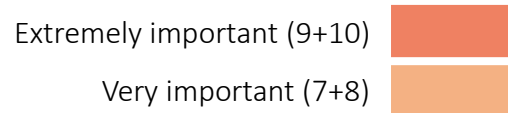
# Influential Factors when Choosing a Travel Destination by International Travellers



Extremely important (9+10) and Very important (7+8)

SOURCE MARKETS

	Total	Australia	China	France	Germany	India	Japan	South Korea	UK	USA
Hotels / Accommodation	44 39	36 45	38 49	35 44	47 34	67 25	37 43	41 39	46 38	51 34
Restaurants & Food	41 39	31 44	39 48	31 42	32 40	65 26	35 42	44 41	40 40	49 33
Culture, Arts & Heritage	37 38	27 43	40 47	33 38	30 34	58 29	32 40	30 41	28 37	46 32
Beach & Marine	33 35	21 37	36 47	28 35	42 33	57 31	17 34	28 36	29 36	38 26
Family Entertainment	30 31	17 28	31 52	23 34	20 22	64 26	20 33	38 36	18 26	35 22
General Entertainment	29 40	23 44	31 51	28 43	22 40	58 31	20 42	15 42	23 37	38 35
Infrastructure	29 42	18 43	37 50	23 44	27 42	55 33	23 46	29 43	18 42	29 38
Shopping & Retail	25 34	18 32	35 50	16 29	21 31	55 31	22 42	17 35	13 30	28 29
Outdoor, Adventure & Sports	24 33	15 34	32 52	20 38	21 28	55 31	13 32	13 28	15 26	30 29



Source: Twenty 31, December 2021

Base per country: Australia, n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803. Total n=6838

DM4. How important are each of the following factors when you select a city to travel to for a leisure trip? Please use a scale of 1-10 where 1 means you think that factor is not at all important, and 10 where you think that factor is very important.

# Matching Tourism Products and Experiences with Target Audiences and Markets

## TOURISM PRODUCTS & EXPERIENCES

- Attractions in South Eastern Ontario with highest profile among travellers from ON and QC are also those associated with the destinations that are best-known – 1000 Islands and Kingston.
- Awareness is moderate to low for most attractions, with only the 1000 Islands Cruises, Sandbanks Provincial Park and Upper Canada Village known to a majority.
- At the same time, more than a third say they would be interested in visiting most attractions.
- Nearly half of South Eastern Ontario potential visitors are very interested in Food and Drink.
- History, Wildlife Viewing, and River Cruising are also highly attractive experiences, followed by Wineries and Hiking.
- Beaches consistently rank high for search volumes of things to do.

## TARGET AUDIENCES & MARKETS

- Leeds Grenville’s target source markets include local residents, short drive markets in South Eastern Ontario, urban Toronto, Montreal and Ottawa areas, as well as near U.S.-border New York state.
- 1000 Islands tours are currently promoted as part of Toronto and other experiences for international visitors.
- ON residents represent two thirds of South Eastern Ontario’s visitor spending, with overall domestic spending accounting for the vast majority.
- Patterns of interest differ by generation, with history and wine itineraries most popular among Boomers, but interest in wildlife viewing and river cruising highest among Gen X, with sports as Millennials top choice.
- More than two in five are likely to consider South Eastern Ontario as a destination for their next leisure trip, rising among those with higher incomes, with children and not born in Canada.

# Transport Infrastructure

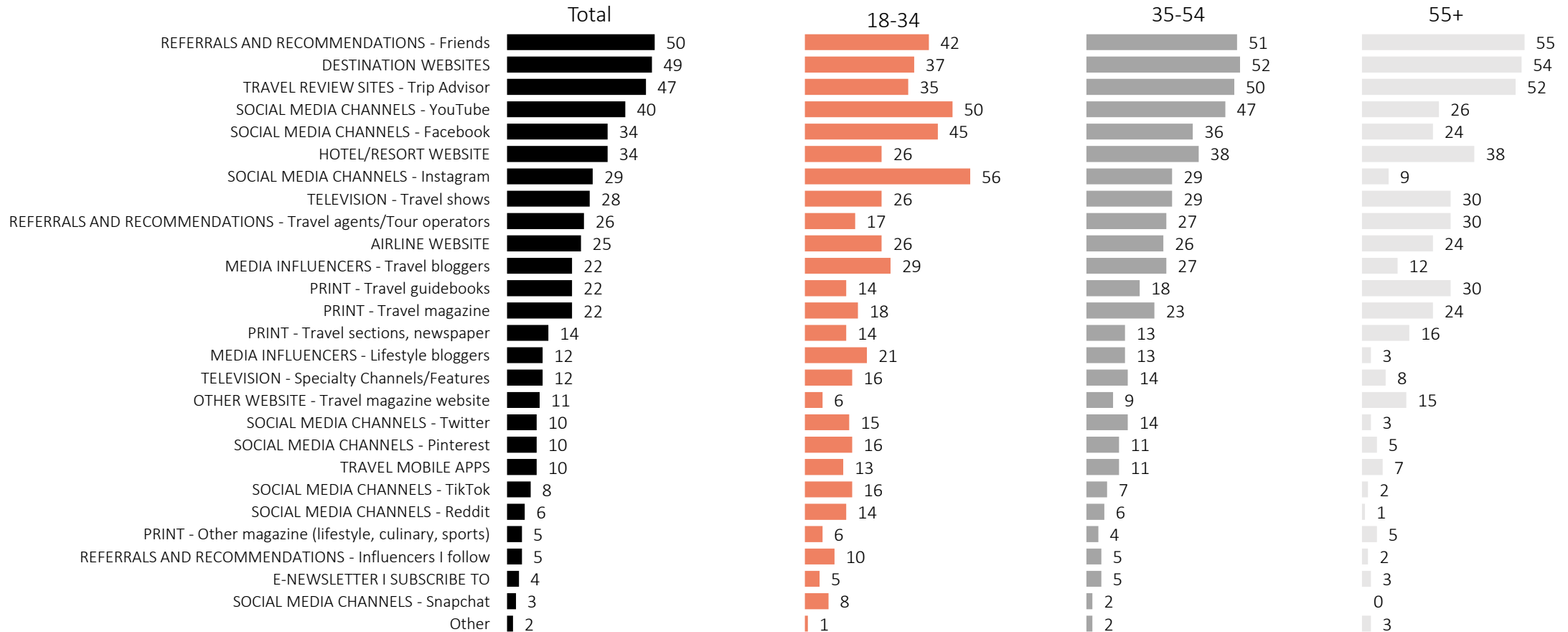


-  Domestic road entry point
-  U.S. road entry point
-  Regional airport

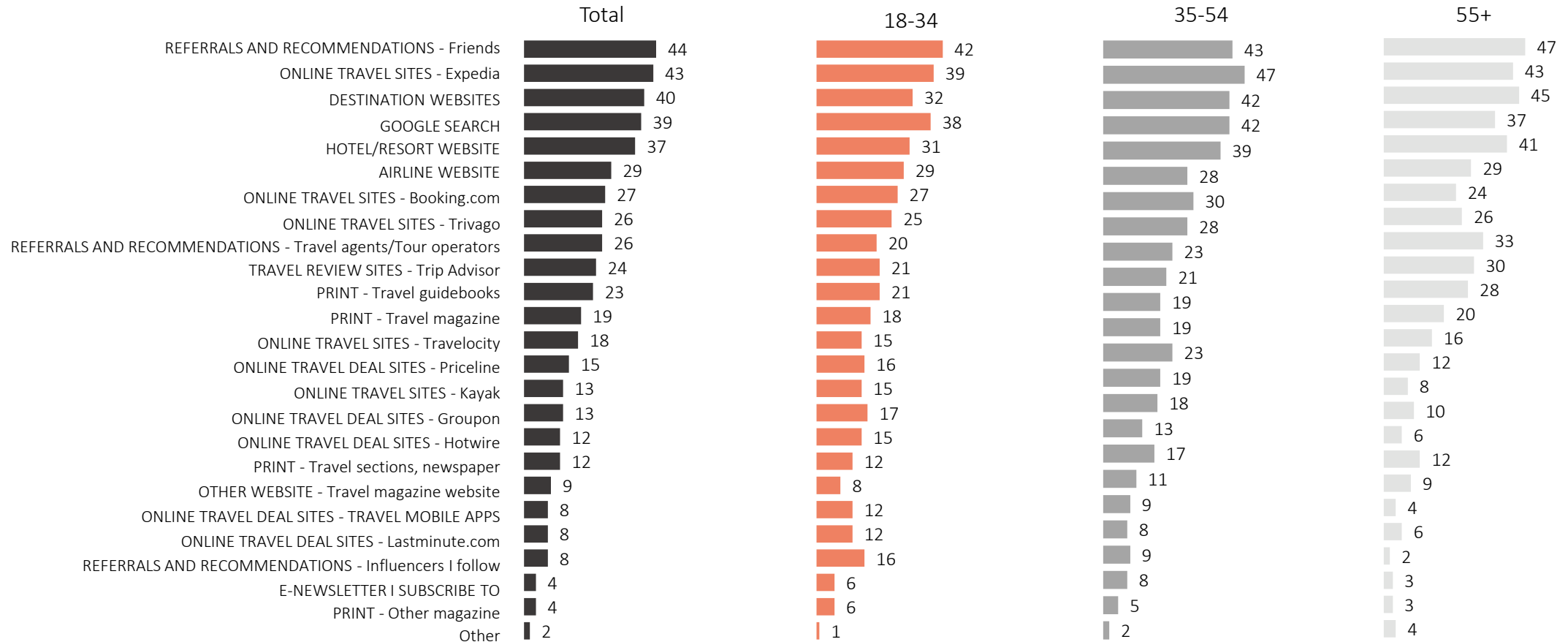
## KEY IMPLICATIONS

- Main entry points for domestic visitors are highways connecting Leeds Grenville with Kingston & Toronto (West), Ottawa (North) and Montreal (East).
- U.S. key entry points connect New York state to Leeds Grenville:
  - Thousand Islands International Bridge
  - Prescott-Ogdensburg International Bridge
- Ottawa and Ogdensburg (NY) International Airports are the nearest options to access international flights, with Toronto and Montreal International Airports relatively close – Brockville-1000 Islands airport can only accommodate private and regional commercial flights.
- Ports and marinas are located across the Counties:
  - Johnstown deep-water port – also a logistics hub
  - 25 marinas along St. Lawrence River & Rideau Canal
- Railway also connects the Counties to Toronto, Ottawa and Montreal city centers.

# Traveller Inspiration Sources in Canada

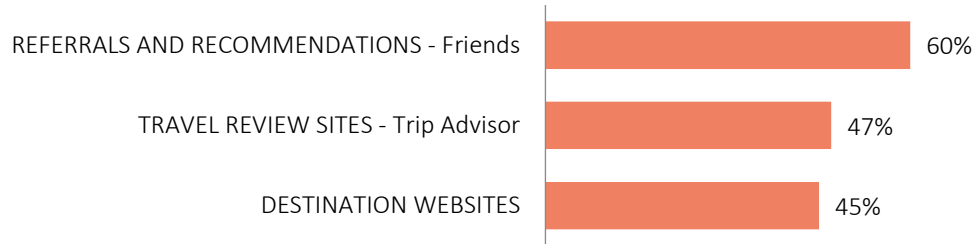


# Traveller Planning Channels in Canada

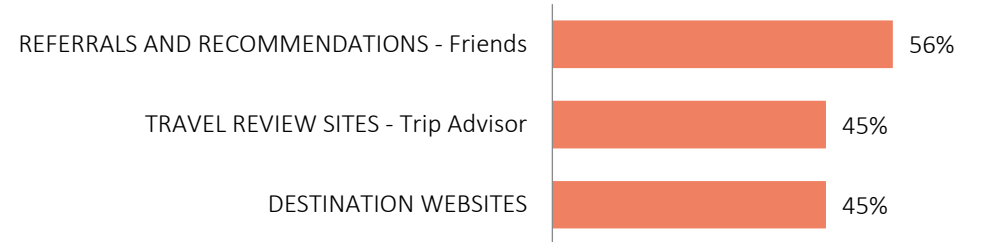


# Inspiration Sources: Leeds Grenville Destinations

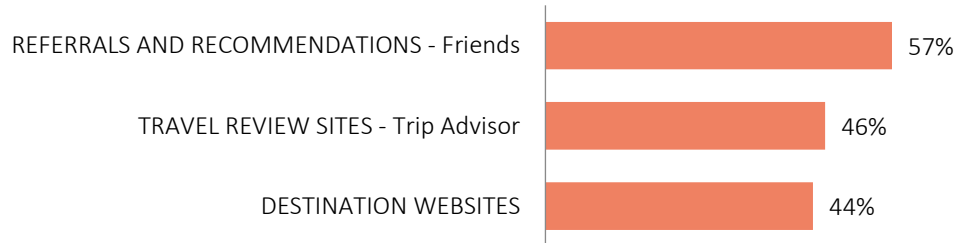
## 1000 ISLANDS



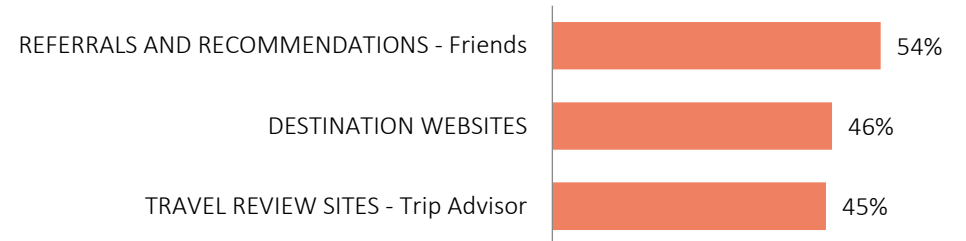
## GANANOQUE



## RIDEAU CANAL



## BROCKVILLE



# Familiarity with Canadian Destinations' Tourism Offering



% Familiar

POTENTIAL TOURISM DESTINATIONS

SOURCE MARKETS

	Kingston	Ottawa	London	Windsor	Sudbury	Thunder Bay	Muskoka Region	Niagara Region	Toronto	South Western Ontario	South Eastern Ontario
<b>Total</b>	22	41	22	16	16	14	21	42	60	28	28
Alberta	11	24	10	8	9	8	8	24	38	9	14
British Columbia	11	26	13	12	10	13	11	25	46	20	15
Manitoba	9	19	12	4	5	10	7	19	26	12	10
New Brunswick	18	31	14	16	11	13	9	23	44	15	16
Newfoundland and Labrador	11	20	9	11	5	6	9	28	50	16	20
Nova Scotia	16	33	16	11	10	4	9	25	32	13	21
Ontario	34	54	36	26	26	19	38	64	82	47	43
Prince Edward Island	9	34	18	9	3	13	25	37	69	20	26
Québec	19	48	14	11	10	13	11	34	53	19	23
Saskatchewan	10	16	8	9	12	12	7	20	35	11	10

Source: Twenty31 – Quantitative survey of Canadian travel consumers, March 2022

Base: Canada, n=1,831

Q7. How familiar are you with what each of the following have to offer as destinations for holiday/vacation travel?

# Impression of Canadian Destinations' Tourism Offering



% Positive Impression

POTENTIAL DESTINATIONS

SOURCE MARKETS

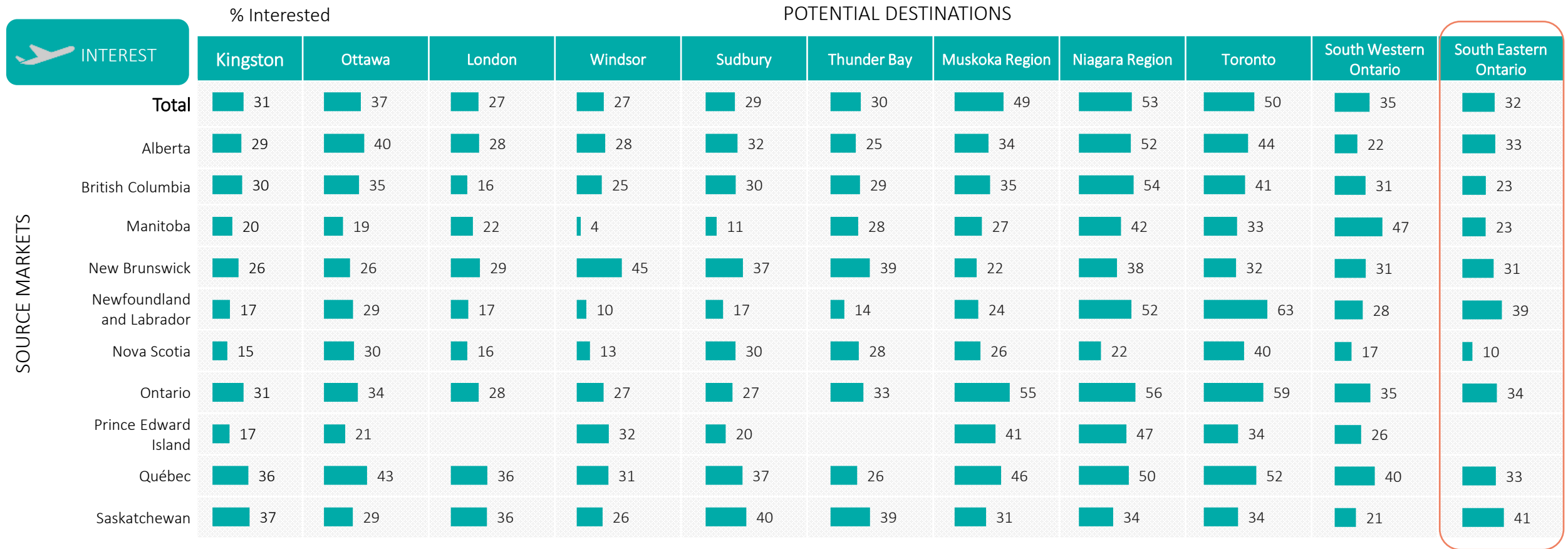
	Kingston	Ottawa	London	Windsor	Sudbury	Thunder Bay	Muskoka Region	Niagara Region	Toronto	South Western Ontario	South Eastern Ontario
<b>Total</b>	46	55	37	34	32	39	67	76	64	47	47
Alberta	27	45	40	43	30	40	63	74	51	42	37
British Columbia	43	53	26	31	27	26	62	86	55	42	33
Manitoba	42	55	37	19	15	34	46	71	45	51	45
New Brunswick	57	52	44	52	43	46	77	75	58	54	67
Newfoundland and Labrador	26	76	35	26	23	30	48	94	91	55	56
Nova Scotia	45	54	34	33	31	53	46	76	51	27	25
Ontario	46	55	37	33	28	39	72	76	75	48	47
Prince Edward Island	29	77	26	47	33	24	59	66	89	52	31
Québec	48	57	41	36	51	48	57	74	61	49	55
Saskatchewan	66	54	27	46	41	48	56	69	44	50	63

Source: Twenty31 – Quantitative survey of Canadian travel consumers, March 2022

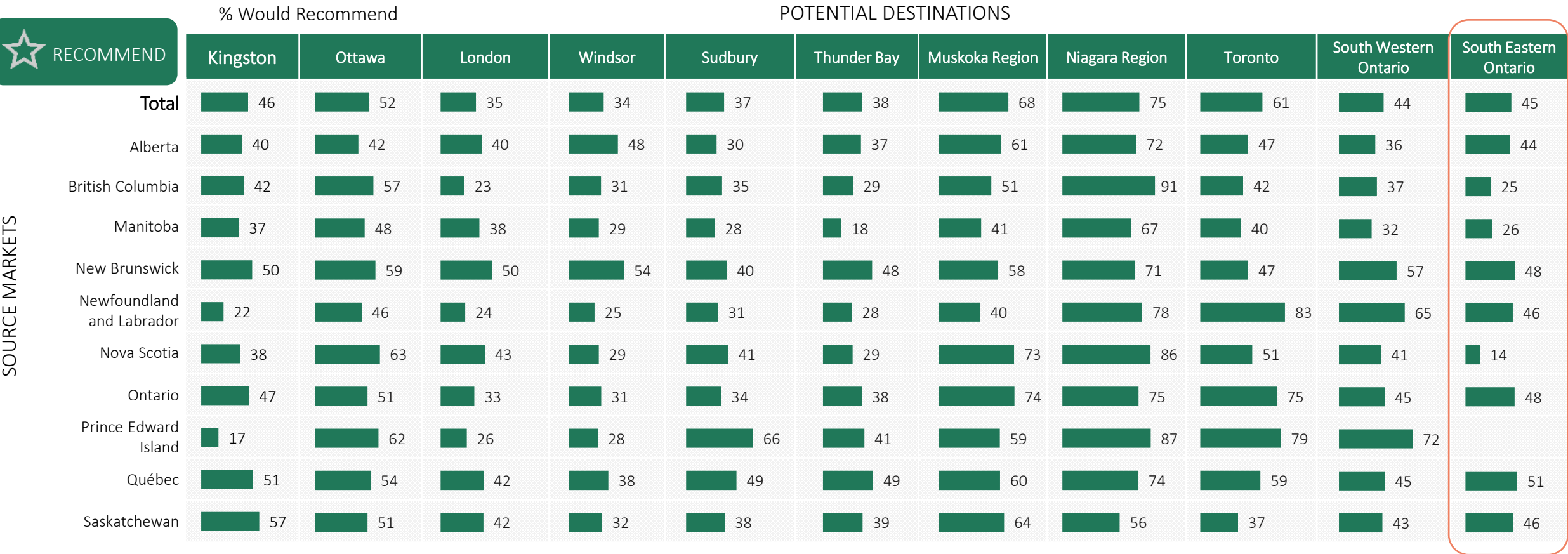
Base: Canada, n=1,811

Q9. What is your overall impression of the following destinations in terms of what they have to offer as holiday/vacation travel experiences?

# Interest in Travel to Canadian Destinations



# Likelihood to Recommend Canadian Destinations



# Appendix B: Stakeholder Engagement Summary



## Stakeholder Interviews, Workshops, and Forums Approach



1. 6-week interview process (May 2-June 9, 2022)
2. Mayors workshop (April 23, 2022)
3. Municipal leadership workshop (April 29, 2022)
4. Community forum (June 8, 2022)



1. 11 questions focused on:
  - Current tourism context
  - Future of tourism
  - Bridging the gap
2. 2h in-person visioning workshop
3. 2h virtual visioning workshop
4. 2h virtual community forum



1. 55+ stakeholder interviews completed
2. Counties Council
3. Municipal Leadership
4. Community forum participants

# Stakeholder Interviews, Workshops, and Forum: Challenges (Supply)



## TOURISM LEADERSHIP

- Lack of single, cohesive, authoritative voice to represent tourism in region
- No big vision or direction on how to capitalize
- Decision to be a four-season destination
- Focus on other industries as a priority due to low ROI in tourism (not a quick return)
- Funding identification and support
- Lack of communication among stakeholders
- Lack of awareness of specific tourism development and support initiatives
- Limited collaboration between operators and municipal DMOs
- Lack of incentives for tourism entrepreneurs in more remote areas
- Fragmentation causing too many entities selling similar offerings



## PRODUCTS & EXPERIENCES

- Understanding of what products still available post-COVID
- Lack of strong demand generators across region to pull visitors
- Lack of organized cross-regional trails
- Lack of organized cross-regional experiences
- Lack of winter/shoulder season experiences
- Lack of on the water experiences and cruise tourism
- Lack of culinary/agri-tourism offering
- Making it easy for people to understand all there is to do
- Creation and promotion of product and experience packages and itineraries
- Sustainability of tourism experiences
- Access to technology to support delivery of tourism products and services
- Lack of experiences catering to more diverse tourists (e.g., French)



## INFRASTRUCTURE & TRANSPORTATION

- Availability of accommodation and attraction options for visitors (business and leisure)
- Growth of campgrounds and seasonal trailers, short-term rentals, and threat of Airbnb/pressure on budgets
- Leveraging under-utilized assets for tourism
- Meeting expectations of visitors from more urban areas
- Getting around the destination by car, rail, or air
- Lack of water-related infrastructure
- Availability of public facilities (e.g., washrooms, visitor centers, internet charging stations, parking, etc.)
- Lack of wayfinding
- Lack of certain cruise infrastructure
- Lack of boat launches/docks, car, and trailer parking
- Amount of waterfront available for investment (i.e., privately owned and/or underutilized)
- Ageing facilities like marinas, resorts, docks



## COMMUNITY SUPPORT

- Negative resident sentiment
- Lack of understanding of value of tourism
- Limited sense of pride for entire region
- Promoting sense of welcome across communities



## RESEARCH

- Access to market insights like key visitor profiles, needs, and behaviours
- Lack of understanding that visitors don't see boundaries
- Understanding of resident/community sentiment
- Understanding of what peer/competitor destinations are doing
- Understanding source of tourism revenues and receipts



## COLLABORATION

- Lack of alignment and collaboration
- Ability to develop cross-region partnerships
- Voices from very small contributors to tourism (e.g., bed & breakfasts) given equal weight to the big voices (e.g., hotels)



## STAFFING

- Major shortage of trained staff in hospitality and food services
- Ability to encourage people back into tourism
- Housing and transportation costs for staff
- Seasonal nature of tourism makes it hard to hire, so entrepreneurs look to other industries

# Stakeholder Interviews, Workshops, and Forum: Challenges (Demand)



## IDENTITY & THEME

- Uniting multiple identities
- Smaller municipalities lost identity
- Defining region as a single region vs. multiple destinations
- Limited art, alternative, and “rebellious” scene
- 1000 Islands and Rideau Canal are known brands, but not connected



## AWARENESS & FAMILIARITY

- Limited brand recognition
- Limited knowledge of geographic location
- Understanding all possible tourism experiences
- Lack of use of major tourism assets for promotion (e.g., World Heritage Sites)
- Single place to get all information



## MARKETING & PROMOTION

- Attracting visitors from nearby urban areas
- U.S. visitors decreased in favour of staying at “American” 1000 Islands
- Attracting new Americans
- Attracting new Canadians (and support they may require such as language)
- Limited appeal to young travellers
- Lack of collaboration between partners competing to “own” 1000 Islands
- Little alignment on marketing activities – solo efforts
- No sustained marketing funding source
- Nothing packaged for trade



## CHANNELS

- Social media strategies are not well aligned and add to confusion of identifying what’s part of the region
- Local residents don’t see themselves in tourism – they are a primary channel that is currently not leveraged
- Lack of integration with RTO, Destination Ontario, Destination Canada marketing efforts
- Digital marketing ecosystem not connected or optimized
- No media strategy in place

# Stakeholder Interviews, Workshops, and Forum: Opportunities (Demand)



## PRODUCT & EXPERIENCE DEVELOPMENT

- Create “one-stop” packaged products
- Focus on trails (e.g., culinary, natural, heritage, etc.)
- Develop more outdoors/nature products and experiences
- Develop wellness experiences
- Develop more cycling products and experiences (e.g., pave cycling shoulders, e-bike rentals)
- Develop more water-related products and experiences (e.g., sailing, scuba diving, etc.)
- Develop more winter/shoulder tourism products and experiences
- Develop more golf products and experiences
- Develop more agri-tourism/farm-to-table/culinary products and experiences
- Develop more regional cruise tourism products and experiences and disperse into region
- Develop business retreat and remote work offering
- Develop industrial tourism experiences



## INFRASTRUCTURE

- Support development of more accommodation (including higher-end accommodations to tap into luxury, wellness visitors)
- Determine transportation solutions to address internal accessibility and disperse visitors from main hubs throughout the region
- Develop electric vehicle (EV) infrastructure
- Develop more waterfront infrastructure (i.e., invest in new boat launch facilities along parkway)
- Invest in broadband access, especially near downtown cores
- Provide more wayfinding opportunities



## COMMUNITY SUPPORT

- Enable communities to network
- Foster more tourism collaboration across communities and businesses
- Provide additional support to volunteer and community groups (e.g., financial, insurance, etc.)
- Communicate importance of tourism innovatively and more frequently with residents
- Cooperate with universities/colleges or internships to drive interest in tourism industry - including hospitality and culinary
- Provide tangible financial support to operators and socially-focused organizations (e.g., associations, etc.)



## FESTIVALS & EVENTS

- Develop community festivals and events
- Develop community festivals and events to drive visitors to the area at different times of the year
- Link festivals and events with tourism packages



## INDIGENOUS TOURISM

- Ensure early and meaningful consultation with Indigenous groups
- Integrate Indigenous experiences into product development and marketing



## RESEARCH

- Understand latest tourism trends and innovations
- Understand markets and profiles
- Utilize Destination Ontario and/or Destination Canada audience profiles
- Understand local and visitor sentiment
- Identify product and experience gaps, particularly under-utilized assets



## INVESTMENT

- Develop investor attraction profiles and plans
- Think beyond government funding

# Stakeholder Interviews, Workshops, and Forum: Opportunities (Supply)



## MARKETS

- Tap more holistically into local ON market
- Tap more into markets further away like QC
- Tap into nearby U.S. markets (i.e., existing and potential markets)
- Tap into international markets (i.e., existing and potential markets)
- Attract young urbanites
- Attract cyclists onto the trails



## MARKETING & PROMOTION

- Clearly define brand and brand architecture
- Develop brand guidelines and communicate them with stakeholders
- Develop and leverage strong media relations
- Train tourism stakeholders on communications approaches
- Create social media/influencer marketing campaigns – include locals
- Showcase region as example of sustainability lab, especially for inland municipalities
- Invest in marketing asset development; photography, video and written content
- Build content calendar that reflects and includes diversity of experiences, operators and seasons
- Consider positioning the region around its “slow tourism” strengths



## CHANNELS

- Work with travel trade for group tours/media – Destination Ontario and Destination Canada
- Create partnerships with online booking agents
- Create regional social channels and develop content strategy and plan for consistent content development and channel management
- Invest in website – create short/medium term development plan
- Identify key channels to reach residents
- Partner with neighbouring DMOs for inclusion in international efforts (e.g., Ottawa)

# Stakeholder Survey Approach



6-week survey period via  
SurveyMonkey (May 2-June 9,  
2022)



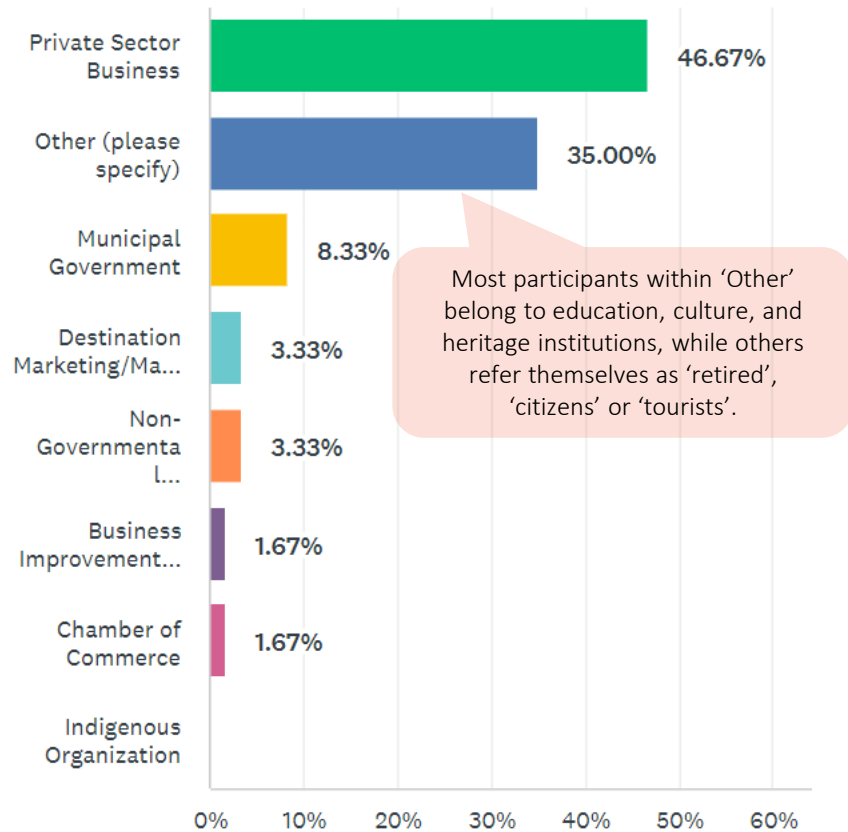
13 questions (11 open-end)



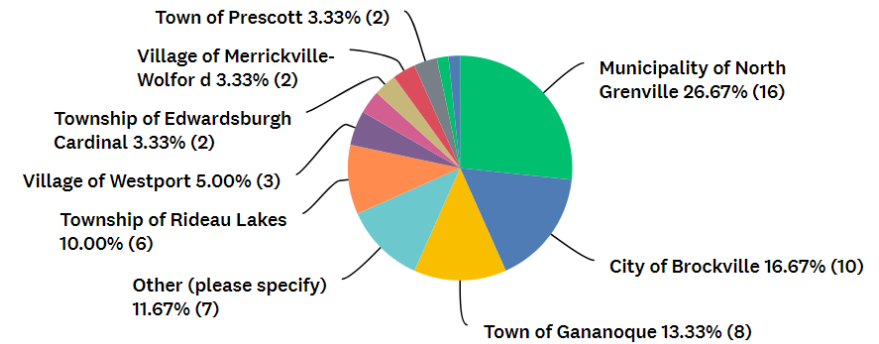
60 responses

# Stakeholder Survey: Respondent Type, Location and Experience with Tourism

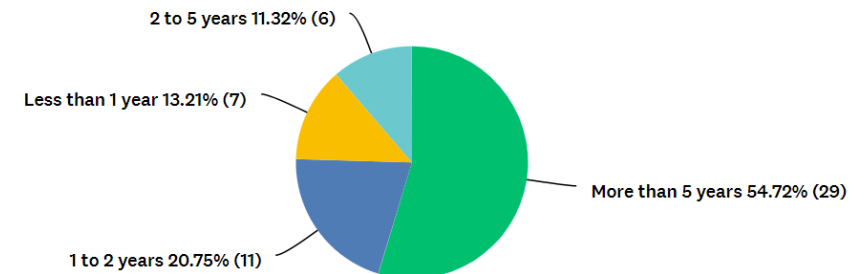
Q11. What best describes the sort of organization you represent?



Q12. Please identify which municipality your business/organization is located within. If you are located within more than one municipality, please select your main office location.



Q13. How long have you been involved or engaged in the travel and tourism industry/economy in Leeds and Grenville?



# What would you describe as the greatest tourism assets in the Leeds Grenville region? What makes you proud of the Counties region?

## Top 10 assets stakeholders describe as Leeds Grenville's greatest assets:

1. Rideau Canal and waterways
2. 1000 Islands and St. Lawrence River
3. Kemptonville Creek
4. Nature and outdoor activities
5. Walking/hiking trails
6. Farm products/markets and agritourism
7. Cruise and boating
8. Culture, heritage, and villages
9. Restaurant and culinary experiences
10. Proximity to large urban centers

## Top 10 things that makes stakeholders proud of Leeds Grenville:

1. Sense of community
2. Water and natural beauty
3. Inclusivity
4. Entrepreneurship and volunteering
5. High quality of life
6. Heritage and conservation
7. Agriculture and farm tradition
8. Small towns and hidden gem locations
9. Safety and cleanliness
10. Relaxed and quietness

## KEY IMPLICATIONS

- Key tourism assets are a combination of:
  - River, lakes, and waterways – water as the centre of the tourism experience
  - The great outdoors – including nature-based activities and unique rural setting
  - Farm-to-table products – including farmers' markets, as well as agritourism
  - Privileged geographic location –proximity to large cities
- Key attributes making Leeds Grenville unique:
  - Natural beauty of its landscapes, filled with charming small towns, heritage, and unspoiled locations
  - Sense of community and values of the people, encompassing entrepreneurial spirit, welcoming attitude, and willingness to preserve local practices
  - High standards for quality of life, enabling for a relaxed and safe lifestyle

# What are some of the main challenges and opportunities for development of tourism in Leeds Grenville?

## Challenges

1. Economic uncertainty and inflation
2. Lack of accommodations
3. Lack of funding
4. Limited public transportation connecting tourism destinations
5. Labour shortages
6. Limited marketing and promotion efforts to increase awareness of the region
7. Downtowns revitalizations
8. Absorbing of tourist crowds into rural areas
9. COVID-19 travel restrictions
10. Lack of tourism industry collaboration

## Opportunities

1. Define and develop unique anchor products and experiences
2. Focus on sustainable experiential tourism – especially agritourism and outdoor activities
3. Support tourism businesses – grant research, marketing
4. Leverage cruise tourism to disperse visitors towards inland communities
5. Attract residents from nearby urban centers and encourage domestic tourism
6. Develop further hiking and cycling trails
7. Increase investment in marketing and promotion
8. Develop tourism packages/bundles to incentivize longer stays
9. Increase festivals and events
10. Become a year-round destination

## KEY IMPLICATIONS

### Challenges

- Most common concerns are related to the sudden increase of cost of living and business operations, adding to the still present COVID-19 impact, and further hindering industry recovery, as well as labour shortages.
- Small businesses acknowledge difficulties faced with limited resources and need for additional funding.
- Current accommodation capacity and standards do not support the potential tourism growth of the region.
- Destination awareness and public transportation .

### Opportunities

- Unique destination proposition for ecotourism.
- Opportunity to create attractive products and packages resulting from collaboration between local business ecosystem, dispersing demand across the region.
- Tourism businesses deeply value access to funding and marketing resources.

# What is the Leeds Grenville Economic Development Office currently doing well to sustainably develop and responsibly manage tourism in the Counties?

## What is Leeds Grenville Economic Development Office doing well?

- Providing regular regional tourism updates and communication
- Enhancing stakeholder engagement
- Promoting the destination through multiple channels – social media, pop up venues, etc.
- Supporting tourism businesses
  - Showcasing business opportunities and directory
  - Providing marketing and advertising opportunities
  - Researching and communicating available grants for tourism businesses
  - Providing partnership opportunities
- Being available for discussion
- Promoting and supporting local events and artists
- Attracting international tourism companies into the Counties

## KEY IMPLICATIONS

- Many respondents recognize the value of the organization to develop and promote the destination, support local operators and events/artists.
- Communication, engagement, and networking for the industry is viewed as key, with special mention to the e-newsletter updates.

# What are some areas the Leeds Grenville Economic Development Office could improve or enhance to support the travel and tourism industry in the Counties to better recover?

## What are some things Leeds Grenville Economic Development Office can improve?

- Improve awareness among stakeholders of tourism initiatives and/or support programs
- Actively contribute to cluster tourism businesses to collectively participate in joint marketing, packages, multi-day tours – allow for economies of scale
- Foster collaboration among public and private stakeholders to develop new tourism concepts acting as anchor
- Increase awareness of own actions and initiatives – take a leading role in the region
- Sponsor the creation of educational/tourism information centres
- Act as a catalyst for tourism leadership coordination
- Provide greater support for fairs and festivals
- Revitalize downtowns for both residents and visitors
- Blur the county lines – consistent advertising across the region and visitor dispersion
- Lobby for better public transportation and tourism infrastructure/signage
- Develop segmentation marketing strategies by destination and promote through innovative channels
- Support access to funding and grants by local operators across communities

### KEY IMPLICATIONS

- Many stakeholders are unable to provide feedback due to lack of knowledge on tourism-related activities sponsored by the Economic Development Office.
- Stakeholders repeatedly demand enabling the creation of tourism products and packages with participation of multiple tourism operators.
- A Counties tourism office should ensure a segmented marketing approach across the region and aim for local and relevant impact.
- New tourism concepts/products should be leveraged to disperse visitors from current tourism hubs to the rest of the region.
- A Counties tourism office should become the catalyst for tourism collaboration at various levels, supporting improved transportation, infrastructure and funding.
- Greater support to increase the events and festivals offering is requested.

# What are some areas your local municipality could improve or enhance to support the travel and tourism industry in the Counties to better recover?

## What are some things local municipalities can improve?

- Enable more accommodation development
- Develop a stronger partnership with Leeds Grenville Economic Development Office
- Attract and host events that benefit the whole tourism ecosystem, also reducing financial barriers for organizers
- Develop cycling trails
- Incentivize restaurant visitation for both residents and visitors
- Support tourism business entrepreneurship and diversity
- Encourage multi-day experiences
- Improve parking availability
- Coordinate joint marketing efforts to capitalize both on domestic and U.S. visitors
- Improve wayfinding and signage to tourist attractions
- Fund heritage and environment preservation
- Improve infrastructure supporting the tourism experience e.g., roads, washrooms, Wi-Fi
- Increase beautification efforts
- Ensure cleanliness and safety

## KEY IMPLICATIONS

- Municipalities have a key role in implementation of tourism initiatives, hence stakeholders require a higher collaboration among these, but also with Leeds Grenville Economic Development Office.
- Capacity increase through commercial accommodation is crucial to support tourism growth in most municipalities.
- Incentives for local restaurants and operators should be in place to diversify the tourism ecosystem and ensure sustainable growth.
- Municipalities should invest in effective signage of main tourism assets, as well as strive to preserve the local heritage and environment.
- Beautification and infrastructure enhancement are considered main enablers for tourism growth.
- Stakeholders demand less bureaucracy and costs to organize festivals and events.

# Thinking beyond immediate recovery of the tourism and hospitality industry and economy in the Counties, where would you like to see the destination in 10 years?

## What destination should Leeds Grenville become?

- Thriving – a must explore destination in ON for residents in Toronto, Ottawa, and Montréal, as well as for Canadian and international visitors
- Leading sustainable destination with a key role for the local community
- Vibrant offerings combined with unspoiled nature and charming villages
- Robust and active network of tourism business partners, with events that draw people in and encourage them to stay longer and explore more
- A must visit destination for local culinary experiences and inspiring culture and art
- Leading cycling, hiking, and water sports destination
- Diverse, inclusive and multicultural destination
- Increased number and range of accommodation types and hosting repeat high-yield visitors
- Having a mature tourism leadership organization, focused on tourism strategy
- Year-round destination without mass tourism but high yield/ROI
- Trending cafés and shops, targeting young visitors

## KEY IMPLICATIONS

- Leeds Grenville’s future destination proposition described by its stakeholders follows the outcome of previously outlined challenges and opportunities.
- There is consensus on striving to become a leading sustainable destination, with a great mix of rural and urban experiences, powered by a dynamic local tourism business ecosystem.
- Leeds Grenville should appeal to both domestic and international visitors, offering proper accessibility to the region and accommodation types suitable for all types of visitors.
- Appropriate product and destination development should support stakeholders’ long-term vision.

Thinking about a tourism destination you admire, what are some programs or initiatives they have, to both support their travel and tourism industry, and contribute to sustainable growth and development of the overall destination?

**Programs/initiatives admired:**

- Tourism stakeholders collaboration at a regional level
- National parks and variety of trails
- Focus on high-quality vs. mass tourism
- Wide range of accommodation types
- Waterfront development as primary attraction
- Focus on outdoor experiences, agritourism, sustainability and culture
- Visitation passes / multi-visit discounts – incentives for residents too
- Diverse and high-quality food scene, with more entertainment options
- Year-round experiences
- Coordinated sense of place - all stakeholders seem to speak the same message
- Funding for small tourism businesses
- Development of new tourism destinations out of the usual itineraries
- Improve transport infrastructure both to access and navigate through the region
- Digitalization of marketing and experiences

**KEY IMPLICATIONS**

- Based on what other inspiring destinations are doing, Leeds Grenville’s tourism stakeholders advocate for appealing to high-quality tourism all year round.
- Leeds Grenville’s has an opportunity to be known for providing best-in-class sustainable experiences with focus on outdoor and water activities, agritourism, together with vibrant shopping, dining, culture, and entertainment options.
- Investment into community beautification, such as waterfronts, contribute to increase the destination appeal to residents first, and then to visitors.
- Suitable accommodations and enhancement of products and infrastructure should support the destination development.
- Opportunity for a Counties tourism office to play a leading role to ensure coordinated efforts among all tourism stakeholders, as well as ensuring the economic viability of the local tourism ecosystem.

Do you have any other comments you would like to share with Leeds Grenville Economic Development Office as they develop the Counties strategic plans?

**Additional thoughts:**

- Uncover Leeds Grenville uniqueness – waterways and greenspace
- Scout municipal tourism experts to assess potential new product and destination developments
- Share research and insights with the whole industry
- Ensure the local community well-being as tourism grows in the region
- Focus on accessibility to tourism attractions
- Increase parks and recreation space
- Improve public transportation connectivity
- Attract high-profile tourism operators across the Counties
- Ensure positive and thorough engagement with all municipalities and industry stakeholders
- Invest in branding across all destinations and provide destination marketing content to businesses
- Protect the nature and heritage to preserve the unspoiled vibe of Leeds Grenville

KEY IMPLICATIONS

- Additional ideas have been included in this last comments section, together with a good amount of positive feedback and supporting messages:
  - “Good job. Keep up the forward thinking”
  - “Please keep on trying to bring everyone together on this and to support a better overview to the world of all this area has to offer”
  - “Thank you for sharing this survey!”
  - “Thanks for helping to put things into action that benefit our whole region. Without our inventiveness, our connectedness, our character and personality, we wouldn't be who we are”
  - “I am glad you are working on this and I see a ton of potential in our area”
  - “Thank you for asking our opinions”

# Association, Organization, and Committee Questionnaire Approach



3-week response period via email (May 6-30, 2022)



Three questions focused on:

1. Challenges impacting tourism over the next 3-5 years
2. Opportunities and/or specific actions to advance tourism in the next 3-5 years
3. Final thoughts



10 responses

# What are the main challenges that exist that would impede tourism in the next 3-5 years?

## Main challenges:

- COVID-19 safety standards
- Short-term economic uncertainty
- Limited marketing and promotion
- Lack of extensive cycling infrastructure
- Limited tourism leadership coordination
- Need for stronger stakeholder collaboration
- Expensive domestic travel (fuel costs)
- Competition with other destinations to attract fewer visitors
- Lack of accommodations
- Dependence on volunteers for event organization
- Fragmented tourism content for trip-planning and inspiration
- Accessibility to grants by non-profit groups in small communities
- Critical financial situation for operators
- Labour shortages in primary attractions
- Limited accessibility infrastructure
- Seasonality
- Overfishing and lake pollution
- Limited trail infrastructure
- Reduced opening times for restaurants and cafés
- Not enough campgrounds

## KEY IMPLICATIONS

- Most common concerns are around the current economic uncertainty due to geopolitical instability, resulting into inflation, especially affecting fuel price.
- Operators in the region are still in a recovery phase after the severe impact of COVID-19, hence access to funding is critical.
- More accommodation offering, apart from short-term rentals, is needed across the Counties, especially in the more rural municipalities currently lacking capacity.
- Further tourism leadership collaboration is required, as formal collaboration among industry stakeholders could improve.
- The quality of the water, especially in Rideau Lakes, is a main concern.
- Also, most respondents consider a key challenge to appeal to domestic visitors, who may consider more cost-effective international destinations for their upcoming leisure trips.

# What are the main opportunities and/or specific actions that can be taken (or created) that would support/enable tourism in the next 3-5 years?

## Main opportunities and/or specific actions:

- Improve infrastructure and marketing for boating, paddling and cycling tourism
- Tourism leadership to facilitate community involvement and partner collaboration
- Create and improve trails (hiking, cross country, ATV) and package experiences
- Create a dedicated Leeds Grenville tourism organization
- Collaborative approach to secure funding, especially for small communities
- Provide more visibility to the different destinations/municipalities in communication channels
- Increase the range of accommodations
- Increase the number of events and disperse them across the region
- Build a network of accessible public bathrooms
- Install EV charging stations
- Encourage longer operating hours for businesses, especially on the weekend
- Partner with universities to attract tourism employment and younger visitors
- Increase tourism labour housing, including converting commercial properties
- Focus on resident sentiment
- Invest in nature and water preservation
- Train operators on successful tourism experiences and event delivery
- Focus on tourism investment attraction
- Incentivize farmers' and artisan markets

## KEY IMPLICATIONS

- Main focus is on opportunities fostering collaboration among industry stakeholders to maximize funding programs' application success.
- Capitalize on existing nature-based assets by packaging experiences and developing growth segments, while ensuring sustainability is a unique differentiator for the Counties.
- Need to transition to a more mature tourism destination i.e., increasing capacity, business operating hours, worker accommodation.
- Responses also indicate that the establishment of a Counties tourism office for Leeds Grenville is key to provide leadership for implementation.
- The resulting tourism strategy should be bold, navigate politics smoothly, and provide clear accountabilities, timelines and measured results.

# Appendix C: Initiative Prioritization Assessment & Results



# Initiative Prioritization Assessment

During project discovery, Leeds Grenville had a multitude of possible initiatives that it could undertake to achieve its regional tourism strategic objectives over the next five years.

The question then was how to prioritize initiatives to identify the ones that would most likely enable Leeds Grenville to achieve its inaugural Regional Tourism Destination Strategy, given unknown funding and staffing resources available to oversee its implementation.

The Regional Tourism Destination Strategy Steering Committee and Leeds Grenville Economic Development Office staff engaged in a prioritization exercise to rank each initiative identified, ultimately categorizing initiatives in the following way (see Figure 1: Prioritization Framework).

- I. Immediate opportunities that can be accomplished
- II. Opportunities requiring development/exploration, with strong likelihood to achieve objectives, that need more time, attention, research and/or resources
- III. Opportunities that may have some/niche impact on objectives and are easy to implement
- IV. Opportunities that may need to be reassessed when conditions improve to make them easier to implement or become more important (e.g., trends become more favourable)

Results of the prioritization exercise conducted resulted in a clear identification of priorities with perceived strongest impact on immediate objectives, and that were relatively easy to

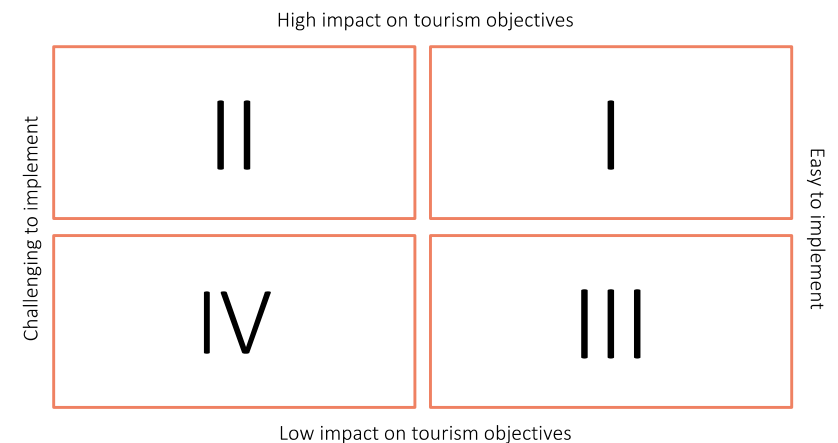
implement versus others that may require a longer runway for implementation. The results of the exercise were quantified, normalized for outliers, and depicted in the chart on the following page.

Initiatives located in the top right quadrant are those that are most likely to achieve immediate strategic objectives and that are the easiest to implement, while those in the bottom left quadrant are those that require additional development.

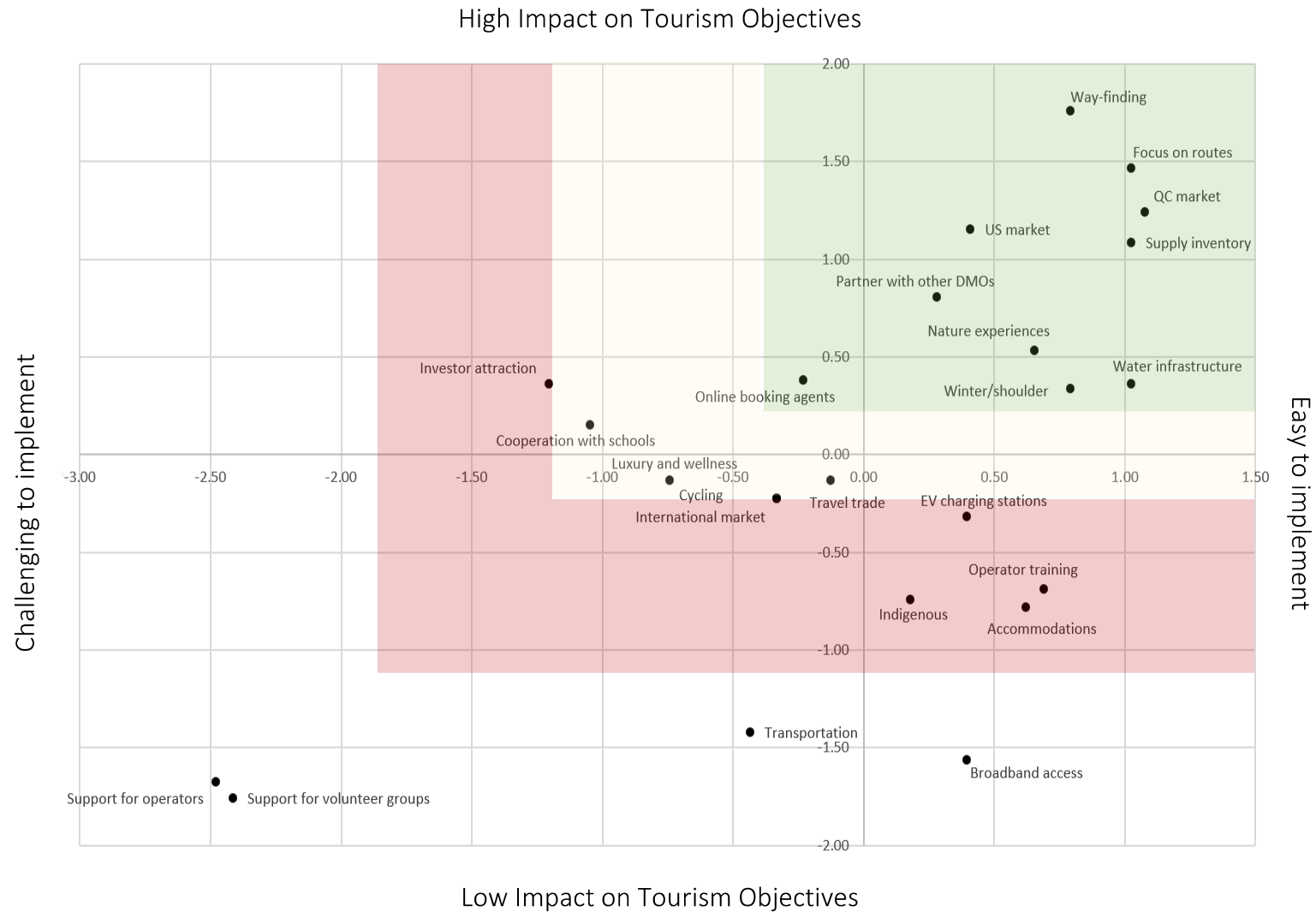
Results of this exercise explicitly define the importance and ease of implementation of initiatives based on the identified objectives.

It is important to note that results of this process are not standalone – additional conversations and expert opinions are required to finetune the importance, order, and timing of the initiatives listed.

**Figure 1: Prioritization Framework**



# Initiative Prioritization Assessment Results



# Appendix D: Detailed Plans at a Glance



# Destination Management Detailed Plans at a Glance

week of:	Responsible	Support	Deliverable(s)/Outcome(s)	Start	End	YEAR 1				YEAR 2				YEAR 3			
						1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
<b>PILLAR 1: DESTINATION MANAGEMENT</b>																	
<b>1. Establish the Counties tourism office</b>						<b>1Q/1Y</b>	<b>Ongoing</b>										
Counties Council (co-lead); Leeds Grenville DMOs/mu	Counties Council (co-lead); Leeds Grenville DMOs/mu	Leeds Grenville DMOs/mu	Counties tourism office established	1Q/1Y	1Y												
Seek approval for the Regional Tourism Strategy from Counties Council, securing funding	TBD	TBD	Approval of Regional Tourism Strategy	1Q/1Y	1Q/1Y												
Officially establish the Counties tourism office embedded under the Leeds Grenville DMOs	TBD	TBD	Establishment of the inaugural Counties tourism office	1Y	1Y												
Consider shuttering Rideau Heritage Route Tourism Association since the Counties Council will be the lead	TBD	TBD	Shuttering of Rideau Heritage Route Tourism Association	1Y	1Y												
Draft and approve job descriptions for the dedicated regional tourism manager and support team	TBD	TBD	Job descriptions	1Y	1Y												
Post job descriptions and hire dedicated regional tourism manager and support team	TBD	TBD	Positions filled	1Y	1Y												
<b>2. Create regional tourism leadership committee to oversee Regional Destination Management</b>						<b>1Q/1Y</b>	<b>Ongoing</b>										
Leeds Grenville Economic Development Corporation	Leeds Grenville Economic Development Corporation	Public and private sector organizations	Creation of Counties tourism office	1Q/1Y	Ongoing												
Identify tourism stakeholders who would be willing and able to be part of the regional tourism leadership committee	TBD	TBD	Identification of tourism committee members	1Q/1Y	1Q/1Y												
Establish regional tourism leadership committee defining governance policies and procedures	TBD	TBD	Defined governance	1Y	1Y												
Work with the Counties tourism office to develop detailed project plans for initiative	TBD	TBD	Detailed project plans	1Y	1Y												
Meet regularly to get updates from initiative leads, address risks, and leverage leadership	TBD	TBD	Ongoing planning meetings	1Y	Ongoing												
<b>3. Improve regional tourism stakeholder collaboration and partnership</b>						<b>1Y</b>	<b>Ongoing</b>										
The Counties tourism office	The Counties tourism office	Tourism associations (small business, industry, etc.)	Regional collaboration improved	1Y	Ongoing												
Work with tourism industry leaders to create a list of collaboration and partnership opportunities	TBD	TBD	Identified collaborations and partnerships	1Y	Ongoing												
Create and execute a collaboration and partnership plan and communicate opportunities	TBD	TBD	Collaboration and partnership plan	1Y	Ongoing												
<b>4. Collect and share market and resident sentiment research</b>						<b>1Y</b>	<b>Ongoing</b>										
The Counties tourism office	The Counties tourism office	Leeds Grenville DMOs/Leeds Grenville Economic Development Corporation	Market and resident research completed	1Y	Ongoing												
Collect, analyze, and share global, domestic, and local tourism trends research.	TBD	TBD	Detailed research on local tourism trends	1Y	Ongoing												
Collect, analyze, and share competitor research.	TBD	TBD	Detailed research on peer/competitor destinations	1Y	Ongoing												
Collect, analyze, and share primary target market research conducted through surveys	TBD	TBD	Detailed research on target market conditions	1Y	Ongoing												
Explore ways to share data and insights on implications with stakeholders, including media	TBD	TBD	Communication of research and key insights	1Y	Ongoing												
<b>5. Improve regional tourism stakeholder communications</b>						<b>1Y</b>	<b>Ongoing</b>										
The Counties tourism office	The Counties tourism office	Leeds Grenville DMOs/Leeds Grenville Economic Development Corporation	Improved communications with stakeholders	1Y	Ongoing												
Conduct in-depth regional tourism stakeholder analysis detailing stakeholder type, needs, and interests	TBD	TBD	Stakeholder analysis	1Y	Ongoing												
Create and execute a regional tourism stakeholder and resident communication plan	TBD	TBD	Continued communications	1Y	Ongoing												
<b>6. Develop and communicate tourism investment attraction plan</b>						<b>2Y</b>	<b>Ongoing</b>										
Leeds Grenville Economic Development Corporation	Leeds Grenville Economic Development Corporation	Regional Entrepreneurship and Innovation Centres	Creation and sharing of investment attraction plan	2Y	Ongoing												
Create an investor attraction brief to entice potential investors to fund Leeds Grenville	TBD	TBD	Attraction plan	1Y	Ongoing												
Explore opportunities to foster more innovation and entrepreneurship across the region	TBD	TBD	More innovation and entrepreneurship	1Y	Ongoing												
Work with existing regional entrepreneurship and innovation centres to identify opportunities	TBD	TBD	More innovation and entrepreneurship	1Y	Ongoing												

# Destination Development Detailed Plans at a Glance

week of:	Responsible	Support	Deliverable(s)/Outcome(s)	Start	End	YEAR 1				YEAR 2				YEAR 3			
						1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
<b>PILLAR 2: DESTINATION DEVELOPMENT</b>																	
<b>7. Address immediate labour bottlenecks</b>																	
	The Counties tourism office	Leeds Grenville DMOs/	Tourism labour bottlenecks ease	1Y	Ongoing												
Identify existing committees focused on addressing labour bottlenecks and explore	TBD	TBD	Tourism labour bottleneck plan	1Y	Ongoing												
Communicate with key tourism stakeholders, role taken on labour committee, and	TBD	TBD	Ongoing communication of action sta	1Y	Ongoing												
<b>8. Improve and share tourism product and experience inventory with</b>																	
Conduct and maintain a regionally-focused inventory and gap analysis of tourism p	The Counties tourism office	Leeds Grenville Econo	Comprehensive tourism asset in	1Y	Ongoing												
Identify, communicate, and collaborate with potential tourism businesses that wo	TBD	TBD	Inventory of all existing tourism assets	1Y	Ongoing												
Explore ways to share data with stakeholders through online solutions.	TBD	TBD	Identification of tourism gaps and opp	1Y	Ongoing												
<b>9. Create desired packages, itineraries, and routes</b>																	
Work with product development specialist (internal or external) with package, itine	The Counties tourism office	Leeds Grenville DMOs/	Enhanced and new packages, itir	1Y	Ongoing												
Outline a detailed product development plan focused on creating building a minim	TBD	TBD	Identify potential package, itinerary, a	1Y	Ongoing												
Market and communicate package, itinerary, and route options targeting identified	TBD	TBD	Create new product development plan	1Y	Ongoing												
Work with various partners (see Initiative 3), such as travel trade partners and onli	TBD	TBD	Target consumers aware of options	1Y	Ongoing												
<b>10. Develop uniquely Leeds Grenville elite packages, itineraries, and</b>																	
Work with product development specialist (internal or external) with package and	The Counties tourism office	Leeds Grenville DMOs/	Elite/Signature experiences	2Y	Ongoing												
Outline a detailed product development plan for elite experiences and Canadian S	TBD	TBD	Identify elite/Signature options	2Y	Ongoing												
Market and communicate package and itinerary options targeting identified mark	TBD	TBD	Create new elite/Signature product	2Y	Ongoing												
Work with various partners (see Initiative 3), such as travel trade partners and onli	TBD	TBD	Target consumers aware of options	2Y	Ongoing												
<b>11. Identify and support enhancement and development of regional t</b>																	
Identify list of infrastructure projects across the region, working with local DMOs a	Leeds Grenville DMOs/mu	The Counties tourism o	Tourism infrastructure opportun	3Y	Ongoing												
Work with partners to support development of the business case for identified infr	TBD	TBD	Identify tourism infrastructure opportu	3Y	Ongoing												
<b>12. Improve wayfinding opportunities</b>																	
Identify list of wayfinding opportunities across the region, working with local DMOs	Leeds Grenville DMOs/mu	The Counties tourism o	Improved wayfinding	2Y	Ongoing												
Work with partners to support development of the business case for identified way	TBD	TBD	Identification and prioritization of way	2Y	Ongoing												
	TBD	TBD	Collaboration on wayfinding opportun	2Y	Ongoing												

# Destination Marketing & Communications Detailed Plans at a Glance

week of:	Responsible	Support	Deliverable(s)/Outcome(s)	Start	End	YEAR 1				YEAR 2				YEAR 3			
						1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
<b>PILLAR 3: DESTINATION MARKETING &amp; COMMUNICATIONS</b>																	
<b>13. Build a Leeds Grenville tourism marketing collective including bra</b>	<b>The Counties tourism office</b>	<b>Leeds Grenville DMOs/</b>	<b>Creation of tourism marketing co</b>	<b>1Y</b>	<b>Ongoing</b>												
Set up a Tourism Marketing Committee (or collective) for ongoing input, guidance.	TBD	TBD	Tourism Marketing Committee	1Y	1Y												
Meet regularly to get updates from various participants, address challenges, levera	TBD	TBD	Ongoing planning meetings	1Y	Ongoing												
Adopt and execute brand recommendations.	TBD	TBD	Adoption and execution of brand	1Y	1Y												
<b>14. Develop digital tourism channels to serve the region</b>	<b>The Counties tourism office</b>	<b>Leeds Grenville DMOs/</b>	<b>New/enhanced digital tourism c</b>	<b>1Y</b>	<b>Ongoing</b>												
Secure/determine funding for website build and build RFP/scope of work for new	TBD	TBD	Funding for website secured	1Y	Ongoing												
Secure/determine funding for development of a content strategy and on-going ex	TBD	TBD	Funding for content strategy secured	1Y	Ongoing												
Establish sustained annual budget for asset development including photography a	TBD	TBD	Identified annual budget	1Y	Ongoing												
Determine roles/responsibilities for web and social content management.	TBD	TBD	Defined roles/responsibilities	1Y	1Y												
<b>15. Build a regional tourism content marketing program</b>	<b>The Counties tourism office</b>	<b>NA</b>	<b>Content marketing program</b>	<b>1Y</b>	<b>Ongoing</b>												
Secure/determine funding for development of a content strategy and on-going ex	TBD	TBD	Secured funding	1Y	Ongoing												
Undertake an SEO audit to assist in plan development (outsource as needed).	TBD	TBD	SEO audit	1Y	1Y												
Establish sustained annual budget for asset development including photography a	TBD	TBD	Identified annual budget for asset dev	1Y	Ongoing												
Determine roles/responsibilities for web and social content management.	TBD	TBD	Defined roles/responsibilities	1Y	1Y												
Establish sustained annual budget for paid media support.	TBD	TBD	Identified annual budget for paid med	1Y	Ongoing												
<b>16. Focus on local engagement</b>	<b>The Counties tourism office</b>	<b>Leeds Grenville DMOs/</b>	<b>More local tourists</b>	<b>1Y</b>	<b>Ongoing</b>												
Set up a Locals Know stream of content, consider local spokespeople to share the	TBD	TBD	Locals content stream	1Y	1Y												
Develop an ongoing communications and marketing plan targeting residents, see	TBD	TBD	Ongoing communications	1Y	Ongoing												
<b>17. Prioritize near domestic markets (ON and QC)</b>	<b>The Counties tourism office</b>	<b>Leeds Grenville DMOs/</b>	<b>Near markets prioritized</b>	<b>1Y</b>	<b>Ongoing</b>												
Incorporate a Québec component into the owned/earned and paid media strateg	TBD	TBD	ON and QC markets incorporated	1Y	Ongoing												
Introduce new ways to experience the region through itineraries/routes.	TBD	TBD	New ways to experience region	1Y	Ongoing												
<b>18. Reconsider U.S. and international opportunities</b>	<b>The Counties tourism office</b>	<b>NA</b>	<b>US and international opportunit</b>	<b>1Y</b>	<b>1Y</b>												
Create an industry trade strategy – supported in part by the development of trade-	TBD	TBD	Industry trade strategy	1Y	1Y												
Build a trade-ready plan for operators – work closely with RTO on the delivery of ed	TBD	TBD	Trade-ready plans	1Y	1Y												
<b>19. Establish online distribution and sales support</b>	<b>The Counties tourism office</b>	<b>Leeds Grenville DMOs/</b>	<b>Online distribution and sales sup</b>	<b>2Y</b>	<b>2Y</b>												
Identify potential trade partners by niche, reach and audiences.	TBD	TBD	Trade partners identified	1Y	1Y												
Share itinerary/route with travel trade partners in advance of going live – What’s n	TBD	TBD	Itinerary/routes shared	1Y	1Y												
Build a trade-ready plan for operators – work closely with RTO9 on the delivery of e	TBD	TBD	Trade-ready plans	1Y	1Y												
<b>20. Support a multi-channel visitor services program with focus on ope</b>	<b>The Counties tourism office</b>	<b>Leeds Grenville DMOs/</b>	<b>Multi-channel visitor services pr</b>	<b>1Y</b>	<b>Ongoing</b>												
Create and optimize digital tools to engage with visitors across all channels, consid	TBD	TBD	New/enhanced digital tools	1Y	Ongoing												
Be prepared to respond to individual requests through social media.	TBD	TBD	Social media responses	1Y	Ongoing												
Review existing visitor service centres and seek opportunities for distribution of QR	TBD	TBD	Visitor services opportunities identifie	1Y	Ongoing												
Promote the value of a regional approach to sharing content, recommendations a	TBD	TBD	Regional collaboration	1Y	Ongoing												
Encourage residents to engage with visitors and share their recommendations.	TBD	TBD	Residents encouraged to engage visit	1Y	Ongoing												

# Appendix E: Role of the Counties Tourism Office and Local Municipalities/DMOs



# Description of Proposed Role of Counties Tourism Office and Local Municipalities/DMOs

NON-COMPREHENSIVE

## THE COUNTIES TOURISM OFFICE ROLES

- Provide leadership and coordination to support competitive and sustainable tourism across Leeds Grenville
- Create a tourism strategy for the Counties in collaboration with key partners, and inform stakeholders on strategic planning and decision-making, addressing tourism challenge, trends and opportunities across the Counties
- Develop and implement a marketing strategy for the Counties that is aligned with RTO9 and provincial plans that also complements local municipal/DMO marketing and communications
- Develop, maintain, and share tourism research on market as well as product inventory and identify product development strategies
- Be single point of contact for tourism management at the Counties-level for both the tourism industry and RTO9
- Equip the Counties to attract more visitors, generate more economic activity, and create more jobs across the province
- Build partnerships, networking, and communications opportunities for the Counties
- Support development of cross-Counties tourism products, experiences, packages, itineraries, and routes
- Work with Leeds Grenville Economic Development Office to support development of investment attraction strategies, plans, and initiatives for the Counties

## LOCAL MUNICIPALITIES/DMO ROLES

- Provide leadership and coordination to support competitive and sustainable tourism at the local municipal/DMO level
- Create tourism strategy along with destination development and marketing plans
- Collect data on local tourism performance as well as information on tourism operators across municipality/designated tourism
- Work with the Counties Tourism Office to share and collect market and consumer trends data to support municipal/DMO and tourism operator decision-making
- Communicate with tourism operators on local and regional tourism priorities, initiatives, and status
- Equip tourism operators to attract more visitors and generate more revenues
- Together with the Counties Tourism Office, identify and act on opportunities for development of inter-and intra-regional partnerships and collaboration
- Identify opportunities for product and experience development at the local municipal/DMO level, and collaborate with the Counties Tourism Office to support cross-Counties product and experience development opportunities
- Implement marketing and communications activities as outlined in local municipal/DMO strategy and market plan

# Appendix F: Description of Possible Itineraries, Packages, & Routes



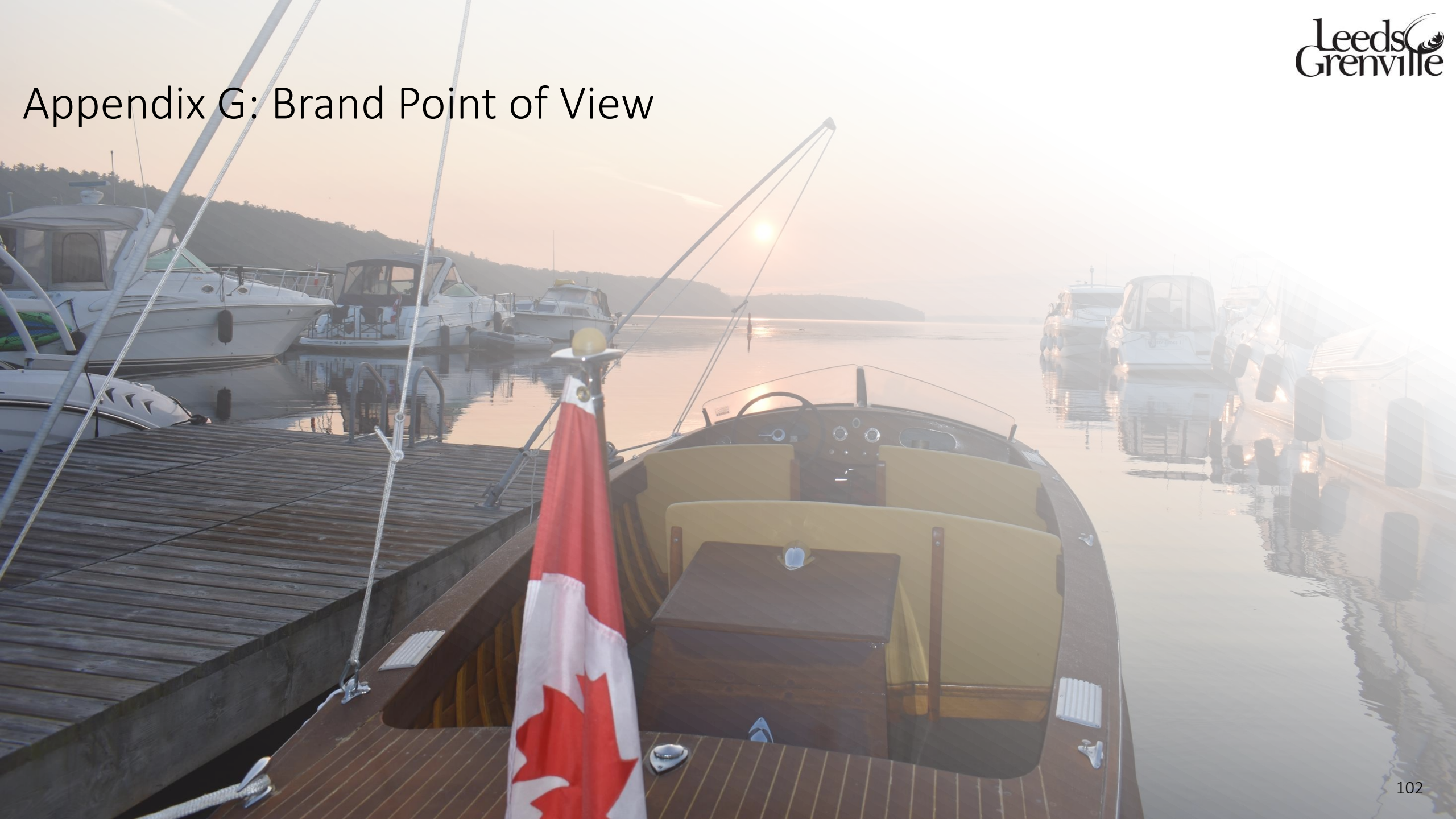
# Itineraries, Packages and Trails

The Regional Tourism Destination Strategy has uncovered a few initial potential itinerary, packages, and routes that need to be further researched to support creation of 1, 2, 3, and 5-day trips or potentially elite experiences and/or Canadian Signature Experiences.

By leveraging research from the Counties Tourism Office, these itineraries, packages, routes, and elite experiences and Canadian Signature Experiences can be created to build awareness and entice visitors to stay longer, spend more, and come again.

Itinerary, Package, and Routes	Description
Flavour Trail	<ul style="list-style-type: none"> <li>The Flavour Trail connects key culinary businesses and experiences across the region with a focus on food and beverage, agri-tourism, and retailers that support those topics.</li> <li><b>Elite experience and/or Signature Experience ideas:</b> Work with Maison Maitland from the Farm Cooking School to create a unique itinerary that includes field trips to high-end restaurants, distilleries, and retail providers throughout the region.</li> </ul>
Scenic Drives	<ul style="list-style-type: none"> <li>Picking up on potential with drive market, scenic drives entice visitors to get off main highways and explore different parts of Leeds Grenville during different times of the year.</li> <li><b>Elite experience and/or Signature Experience ideas:</b> Create audio tool with a voice-over from an influencer from the region to narrate different scenic drives, including historical stories, and special places to stop along the way. Consider a cross-U.S.-Canada border scenic drive working with the Thousand Islands Regional Tourism Development Corporation.</li> </ul>
Village Charms	<ul style="list-style-type: none"> <li>Appeal to visitors, especially those from larger nearby metropolitan areas to get a taste of small town life by inviting them to experience what that can be.</li> <li><b>Elite experience and/or Signature Experience ideas:</b> Designate a month (preferably off-peak) as the Village Charm month – working with local DMOs to create festivals and events to take place during that month with each weekend celebrating a different town in Leeds Grenville on a rotational basis like Merrickville, Wesport, Kemptville, and others.</li> </ul>
River Route	<ul style="list-style-type: none"> <li>Uncover river/canal routes – potentially focusing on the Rideau Canal for boaters to take at different times of the year, with docking infrastructure and attractions that would make for a fun single day or multi-day experience.</li> <li><b>Elite experience and/or Signature Experience ideas:</b> Work with organizations like Le Boat to continue building unique itineraries, particularly enticing for European and U.S. visitors. Ensure boating infrastructure (e.g., deep water docks) and additional tourism attraction needs (e.g., F&amp;B, helicopter experiences, etc.), are included as part of the experience.</li> </ul>
Hiking/Walking/Garden Trails	<ul style="list-style-type: none"> <li>Hiking/walking trails appeal to those who are interested in experiencing more soft and hard adventure and can be positioned as a different way to get off the waterways and explore other parts of the region. This can build on existing trails such as the Leeds Grenville Garden Trail.</li> <li><b>Elite experience and/or Signature Experience ideas:</b> Work with Indigenous tour operators to have an Indigenous person guide hikes pointing out historical, natural, and cultural topics along the way.</li> </ul>
Waterways & Parks	<ul style="list-style-type: none"> <li>Leeds Grenville is blessed with a multitude of waterways and parks and is unique in that it has an important recognized biosphere – an area to build awareness of.</li> <li><b>Elite experience and/or Signature Experience ideas:</b> Work with Frontenac Arch Biosphere Reserve Network to identify unique experiences that can only be experienced in Leeds Grenville, whether it's sleeping under the stars, cleaning up debris from sensitive areas, setting up sustainable infrastructure, etc.</li> </ul>

# Appendix G: Brand Point of View



## Brand Assessment – 1000 Islands and Rideau Canal Waterways

The United Counties of Leeds Grenville has requested a brand point of view (POV) from Alphabet, recognized brand development and tourism marketing experts. The following recommendation was presented to the steering committee.

The assessment followed a brand review of existing destination brands, the existing use of the name 1000 Islands and Rideau Canal Waterways and consultations with industry stakeholders and tourism operators. Stakeholders identified the need for a clearly defined brand that defines the region as a single region vs. multiple destinations and noted the limited knowledge of Leeds Grenville as a geographic location.

Once a name is established, we would recommend a visual identity and fulsome brand messaging platform be developed for on-going use by the Counties in regional tourism internal and external marketing efforts. Brand development is a long-term marketing commitment, and should continue to evolve over time. It is never “finished”.

# A United Counties of Leeds Grenville Brand—Challenges and Opportunities

## Executive Summary

The United Counties of Leeds Grenville is a political entity created for the purposes of efficient administration. It is not a tourism entity. Visitors don't know and don't necessarily care about the political jurisdiction they are visiting, rather the experiences they will have, the sights or icons they will see which draw attention of prospective visitors.

From a destination brand perspective it is not uncommon for cities and regions within a destination to have higher better brand recognition than the state, province or region. For instance the brand recognition of Las Vegas (or Vegas) eclipses the state brand Nevada while California would likely have similar brand recognition as Los Angeles or San Francisco. This is due to millions of dollars of marketing investment supported well beyond tourism.

It takes decades of brand marketing and millions of dollars to achieve brand recognition for a region, more if there is almost no brand recognition at all, as is the case of Leeds Grenville.

The alternative for destinations is to leverage the sub-brands within the region.

In the case of Leeds and Grenville, the brand opportunity lies with two of its sub-brands. The 1000 Islands and Rideau Canal (or Rideau system) are the most effective and cost-effective solution to draw attention to the region through these iconic sub-regions within the United

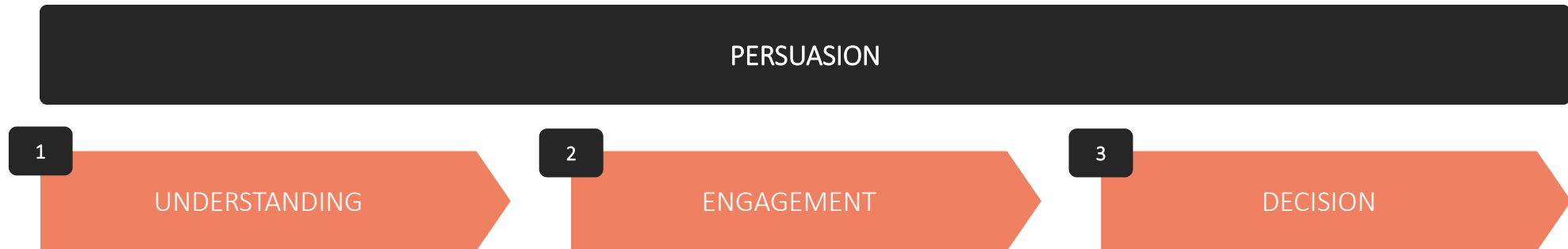
Counties, hook visitors and then encourage them to visit the many hidden gems that lie beyond these areas.

The brand assessment recognizes the strengths and limitations of developing a brand for the United Counties and provides recommendations that reflect the most effective way to develop and enhance its brand to attract visitors to the region.

## Why is Brand Important for Destination Marketing?

Brand plays a crucial role in enabling engagement, fostering understanding and driving decisions for residents, operators, visitors and investors in a region. It is often the initial connection point that builds a perception that may lead to a behaviour change.

A well-articulated brand platform is the basis of powerful, engaging storytelling that humanizes the brand and builds long-lasting emotional connections with the visitor.



## How do we know what the right brand is?

Let's start with the brand name:

- Research tells us that from a pure recognition standpoint the geography of the 1000 Islands and Rideau Canal are the most recognized attraction in the Counties region (see pg. 10 appendix) – including notoriety at an international level. Research also indicates that familiarity drives travel decisions.
- Stakeholders identified 1000 Islands and Rideau Canal as the top tourism assets of the Counties
- There is little recognition of the United Counties of Leeds Grenville as a place to travel – it is a municipal government border with little connection or awareness of experiences or places within.
- Creating a “new” brand is an uphill effort to build both consumer awareness and local tourism community and it requires a significant marketing investment and time. Regional tourism organizations across Ontario (including RTO9) have reverted back to more geographically precise brand names (i.e. from The Great Waterway to South Eastern Ontario, in part to align with Destination Ontario’s marketing efforts).
- There is a significant challenge from a brand adoption point of view to connect all destinations in the Counties and to build trust and acceptance in the benefit from being recognized as part of the 1000 Islands and Rideau Canal region.

- The current usage of 1000 Islands and Rideau Canal Waterways is geographically accurate, but it needs to be further developed as a place brand, a collection of experiences.

So, the question then becomes: **is this region a place defined by geography or by experiences?**

Geography (1000 Islands and Rideau Canal) is a quick shorthand way of gaining trust because it immediately locates you, it is familiar and tangible. But if the place is defined more by experiences it gets to an emotional response quicker, and provides potential direct connection to diverse places within the Counties region.

# Examples of Geography vs. Experience

GEOGRAPHY	EXPERIENCE
GEOGRAPHIC IDENTIFIER	EXPERIENCE-DRIVEN BRAND
<p>Examples:</p> <ul style="list-style-type: none"> <li>• 1000 Islands Trail</li> <li>• Rideau Canal Route</li> <li>• 1000 Islands Loop</li> <li>• 1000 Islands and Rideau Canal Waterways (Existing)</li> </ul>	<p>Examples:</p> <ul style="list-style-type: none"> <li>• The Good Food Loop</li> <li>• The Wellness Loop</li> <li>• A Thousand Welcomes</li> <li>• A Thousand Ways to ... go birding ... go hiking ... eat local ... go boating</li> </ul>

# Brand Name Options Considered

We explored various options of geography vs. experience approaches.

A

The holistic marketing brand becomes:

## The 1000 Islands Loop

How visitors access (buy) that brand is through a collection of curated routes that are at the forefront of the marketing efforts

- Flavour Trail
- Beaches & Parks
- Waterways
- Vintage Vibes

B

The holistic marketing brand remains:

## 1000 Islands & Rideau Canal Waterways

How visitors access (buy) that brand is through a collection of curated routes that are at the forefront of the marketing efforts

- Flavour Trail
- Beaches & Parks
- Waterways
- Vintage Vibes

C

The holistic marketing brand becomes a collection of curated routes:

- Flavour Trail
- 1000 Islands
- Beaches & Parks
- Waterway Stays
- Vintage Vibes

The parent marketing brand is then secondary and is used as a rallying point for industry:

## 1000 Islands & Rideau Canal Waterways

# Brand Name Recommendation

We recommend the use of 1000 Islands & Rideau Canal Waterways as the destination brand name.  
We recommend that destination marketing should focus on itineraries/routes and promotion of the experiences that can be shared there.

A

The holistic marketing brand becomes:  
**1000 Islands Loop**

How visitors access (buy) that brand is through a collection of curated routes that are at the forefront of the marketing efforts

- Flavour Trail
- Beaches & Parks
- Waterways
- Vintage Vibes

B



The holistic marketing brand remains:  
**1000 Islands & Rideau Canal Waterways**

How visitors access (buy) the brand is through a collection of curated routes that are at the forefront of the marketing efforts

- Flavour Trail
- Beaches & Parks
- Waterways
- Vintage Vibes

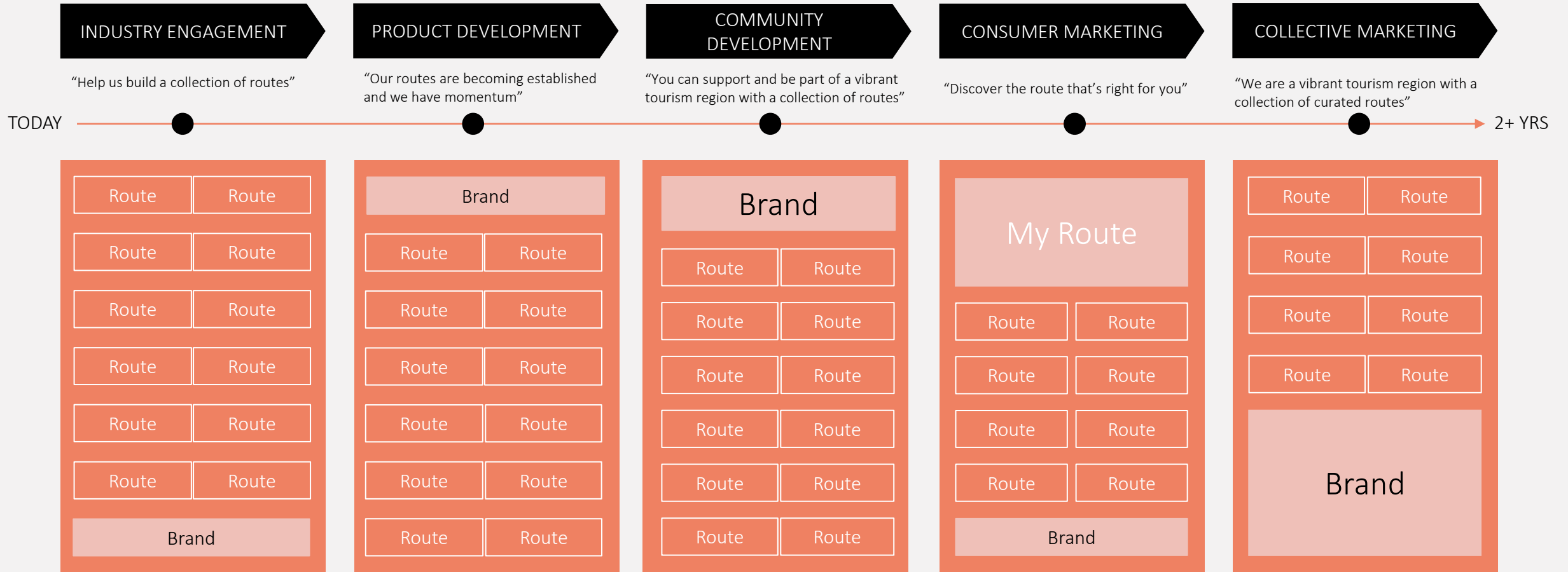
C

The holistic marketing brand becomes a collection of curated routes:

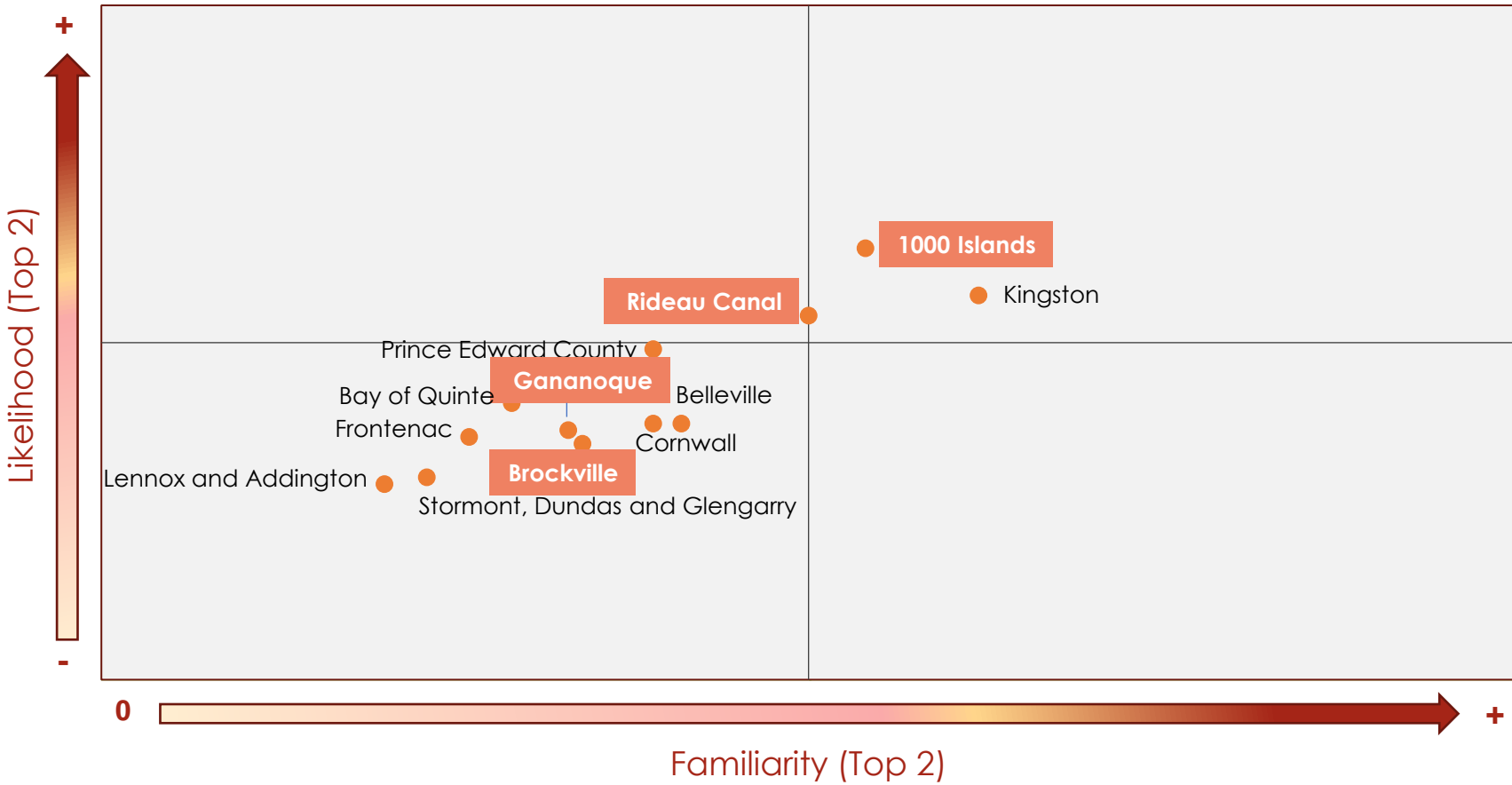
- Flavour Trail
- 1000 Islands
- Beaches & Parks
- Waterway Stays
- Vintage Vibes

The parent marketing brand is then secondary and is used as a rallying point for industry:  
**1000 Islands & Rideau Canal Waterways**

# How Brand Marketing can Evolve



# Destination Familiarity and Likelihood to Visit: South Eastern Ontario



## KEY IMPLICATIONS

- 1000 Islands is the flagship destination in the United Counties of Leeds and Grenville in terms of familiarity and likelihood to visit.
- The municipalities of 1000 Islands are not familiar by name.
- Rideau Canal ranks second in the Counties in familiarity and likelihood to visit.
- Destination likelihood to visit is strongly correlated with destination familiarity

Source: Twenty31 – RTO9 (South Eastern Ontario) consumer perception research, February 2021

Base: Ontario & Quebec, n=1,531

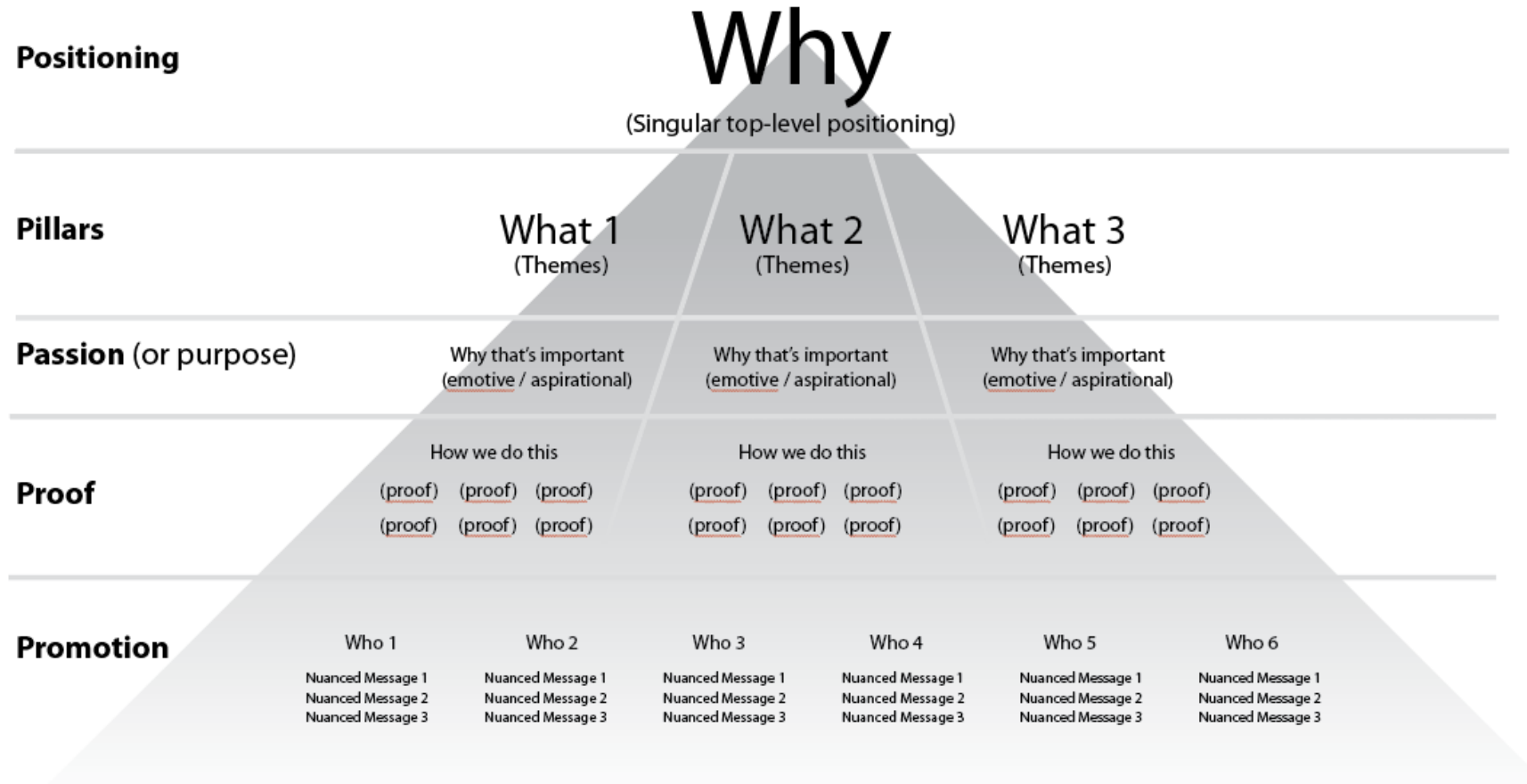
Q12: Here is a list of some destinations within South-Eastern Ontario. For each, please indicate how familiar you feel with what that destination has to offer for holidays/vacations leisure travel. Q13: And for each, please indicate how likely you would be to consider that destination for your next vacation within Canada.

# How do We Build a Brand Narrative?

A useful mechanism for simplifying the complex process of branding is to follow the 5Ps guideline.



# Messaging Framework to Support the Brand Story



# Appendix H: Media Approach



# Owned Media Strategy

Develop an owned media strategy that is reflective of current marketing trends and leverages other tourism marketing entities while focusing on content strategy, content development, management of digital channels and visual asset development.

Opportunity	Description	Potential Impact	Actions Needed
Content Strategy	<ul style="list-style-type: none"> <li>Establish pillars and themes based on priority routes/itineraries and experiences across the region</li> <li>Develop a contributor plan – ideally multiple sources for content development as budget allows</li> <li>Creation of a monthly content calendar planned by channel, topic, and contributor – goal for 2 posts weekly to grow over time</li> <li>Present the region with visuals and videos wherever possible</li> <li>Keep it simple – does not need to be full length articles</li> </ul>	<ul style="list-style-type: none"> <li>Create once, populate everywhere approach (COPE)</li> <li>Shares the authentic, non-commercial stories of operators, experiences, natural assets, etc.</li> <li>Builds awareness for lesser-known businesses and areas within the region</li> <li>Can be used as a paid media effort – broad reach for low cost</li> <li>Can be shared with partners, RTO, Destination Ontario and other partners across various channels including earned media pitches</li> <li>Delivers on organic search</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for content development strategy (outsource vs. in-house)</li> <li>Establish annual budget including photography, video and written content development from local contributors</li> <li>Scope ongoing content management role/responsibilities</li> <li>Frequency is more important than length of content</li> </ul>
Website	<ul style="list-style-type: none"> <li>Develop a stand-alone tourism website</li> <li>Features regional itinerary and experience content</li> <li>Agile content hub – storytelling about operators and experiences</li> <li>SEO optimized</li> </ul>	<ul style="list-style-type: none"> <li>Single web source for regional tourism content</li> <li>Provides link out to operators for more information and event listings (no need for operator listings/listings management)</li> <li>Opportunity for metrics tracking</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for website build</li> <li>Scope content management role/responsibilities</li> <li>Build RFP/scope of work for new website</li> </ul>
Social Channels	<ul style="list-style-type: none"> <li>Introduce branded social channels; Facebook/Instagram, TikTok, YouTube</li> <li>“Always on” approach – scheduled content posts</li> <li>Grow into more dynamic, interactive content; contesting, quizzes, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Grow audience across platforms including residents</li> <li>Leverage and share audience with partners and operators</li> </ul>	<ul style="list-style-type: none"> <li>Scope content management role/responsibilities</li> </ul>
Newsletter	<ul style="list-style-type: none"> <li>Build off success of Economic Development newsletter</li> </ul>	<ul style="list-style-type: none"> <li>Shares the authentic, non-commercial stories of operators, experiences, natural assets, etc.</li> <li>Builds awareness for lesser-known businesses and areas within the region</li> <li>Builds familiarity and trust in the Counties tourism efforts</li> </ul>	<ul style="list-style-type: none"> <li>Scope ongoing content management role/responsibilities</li> </ul>

# Earned Media Strategy

Develop an earned media strategy that supports both internal and external marketing communications objectives, with a focus on operators and experiences.

Opportunity	Description	Potential Impact	Actions Needed
Media Strategy	<ul style="list-style-type: none"> <li>Establish internal and external objectives for earned media</li> <li>Build an earned media approach – what is new, newsworthy, notable, unique, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Can deliver broad reach and impressions for operators and experiences</li> <li>Stories can be shared with RTO, Destination Ontario, Destination Canada, and other partners</li> </ul>	<ul style="list-style-type: none"> <li>Determine funding availability for outsourcing of media relations activities</li> <li>Attend/support RTO earned media activities and appearances at media trade shows</li> <li>Develop a content intake process for operators and partners to share ideas and news</li> </ul>
Media Pitches	<ul style="list-style-type: none"> <li>Active pitching to media outlets resulting in media coverage of news, events, stories, broadcasts ,etc.</li> <li>Can reach across audiences and markets</li> <li>Collect operator and experience stories</li> </ul>	<ul style="list-style-type: none"> <li>Shares the authentic, non-commercial stories of operators, experiences, natural assets in an editorial style</li> <li>Builds awareness for lesser-known businesses and areas within the region</li> <li>Can be shared with partner; RTO, Destination Ontario and other partners</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for earned media activity (outsource vs. in-house)</li> <li>Scope ongoing earned media management role/responsibilities</li> <li>Review RTO9 opportunities for inclusion in earned media plan</li> </ul>
FAM Tours	<ul style="list-style-type: none"> <li>Explore a familiarization tour program and process in support of routes/itineraries</li> </ul>	<ul style="list-style-type: none"> <li>Can be used for FIT, trade, media and influencer markets</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for FAMs</li> <li>Scope content management role/responsibilities</li> <li>Build RFP/scope of work for new website</li> </ul>
Influencer Marketing	<ul style="list-style-type: none"> <li>Explore an influencer marketing program</li> <li>Focus on local influencers – help support content developers through the Counties channels</li> </ul>	<ul style="list-style-type: none"> <li>Builds awareness for region and regional activities through influencer channels</li> <li>Easy to target by niche audiences – i.e., food and drink, paddling, garden tours, hiking, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for influencer marketing</li> <li>Identify niche sectors/activities</li> <li>Research local influencers and evaluate based on fit/audience/messaging</li> </ul>

# Paid Media Strategy

Develop a paid media strategy in support of the content marketing plan. The scope and depth of this component of the plan is contingent on available funding and budget allocation.

Opportunity	Description	Potential Impact	Actions Needed
Media Strategy	<ul style="list-style-type: none"> <li>Apply paid media to boost content on social channels (Facebook and Instagram are primary recommended channels)</li> </ul>	<ul style="list-style-type: none"> <li>Can guarantee reach of audience and geographic area including residents</li> </ul>	<ul style="list-style-type: none"> <li>Determine funding availability for outsourcing of media relations activities</li> <li>Attend/support RTO earned media activities and appearances at media trade shows</li> <li>Develop a content intake process for operators and partners to share ideas and news</li> </ul>
Media Pitches	<ul style="list-style-type: none"> <li>Active pitching to media outlets resulting in media coverage of news, events, stories, broadcasts, etc.</li> <li>Can reach across audiences/markets</li> <li>Collect operator and experience stories</li> </ul>	<ul style="list-style-type: none"> <li>Shares the authentic, non-commercial stories of operators, experiences, natural assets in editorial style</li> <li>Builds awareness for lesser-known businesses and areas within the region</li> <li>Can be shared with partners; RTO, Destination Ontario and other partners</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for earned media activity (outsource vs. in-house)</li> <li>Scope ongoing earned media management role/responsibilities</li> <li>Review RTO9 opportunities for inclusion in earned media plan</li> </ul>
FAM Tours	<ul style="list-style-type: none"> <li>Explore a familiarization tour program and process in support of routes/itineraries</li> </ul>	<ul style="list-style-type: none"> <li>Can be used for FIT, trade, media and influencer markets</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for FAMs</li> <li>Scope content management role/responsibilities</li> <li>Build RFP/scope of work for new website</li> </ul>
Influencer Marketing	<ul style="list-style-type: none"> <li>Explore an influencer marketing program</li> </ul>	<ul style="list-style-type: none"> <li>Builds awareness for region and regional activities through influencer channels</li> <li>Easy to target by niche audiences – i.e., food and drink, paddling, garden tours, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Secure/determine funding for influencer marketing</li> <li>Identify niche sectors/activities</li> </ul>

# Appendix I: Target Audiences & Markets



# Target Audiences and Markets

The marketing strategy for the Counties targets both internal and external audiences. To build tourism from within, it must consider internal audiences as a priority.

1

## INTERNAL AUDIENCES

1. Industry stakeholders; organizations and individuals active in the tourism community and part of strategic consultation. Providers of tourism products or services
2. Local business owners; may or may not consider themselves part of the tourism service economy – mostly SMEs
3. Residents; locals that travel within the region, influence friends and family to visit, welcome visitors to their place

2

## EXTERNAL AUDIENCES

1. Domestic leisure travel market
  - ON residents represent two thirds of South Eastern Ontario’s visitor spending
  - QC residents represent opportunity for growth
  - Largest source markets are within a one-day drive; urban Toronto, Montreal and Ottawa
2. U.S. leisure travellers
3. International leisure travellers
4. Influencers and media

## Priority Traveller Profiles

The marketing strategy for the Counties should target a variety of audiences based on experiences of interest, previous travel history and travel motivators.

The nature of digital marketing is such that the channels themselves identify best prospects for engagement based on content performance (it is less about demographics and more about online behaviours).

Ongoing research conducted by the Counties will help to identify priority and emerging markets. Destination Canada, Destination Ontario, and RTO9 all provide consumer audience profiles.

### LOCAL RESIDENTS

- Adults across ages and incomes travelling as couples and families
- Less likely to be culturally diverse
- Enjoy nature, looking to escape
- Want to support small businesses
- Seeking community culture, art and theatre
- Day trips and overnights

### URBAN COUPLES

- Couples travelling to escape urban centres; younger adults + mature adults (traveling without kids)
- Connect with nature and local culture
- More likely to be culturally diverse
- Value health and well-being
- "Weekend adventurers" willing to go off the beaten track
- Travel enthusiasts









### FAMILIES









- Families motivated to connect with each other, and unwind in a relaxed setting
- Mix of urban and suburban families with school-aged children
- Connect with nature and parks
- Looking for nature experiences and outdoor family fun
- Motivated by price and convenience

# Consumer Audiences and Markets

To better understand ON visitors who frequent different experiences within the province, Destination Ontario analyzed 16 tourism product categories, split between major attractions and community attractions.

These categories assist in identifying the most effective media channels, geotargeting high-potential audiences by postal code and trip motivators. Each profile includes local and non-local visitor profiles.

-  Art Galleries
-  Attraction Theme Parks
-  ATVing
-  Breweries, Cideries & Distilleries
-  Farmers' Market
-  Angling
-  Foodie Destinations
-  Francophone Experiences

-  Indigenous Experiences
-  Major League Sports
-  Museums & Heritage Sites
-  Opera, Ballet & Symphony
-  Resorts
-  Spas & Retreats
-  Theatre & Film
-  Wine Region

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Local Target Audiences and Markets: Foodie Destinations, Food Trails & Festivals

Local visitors enjoying community attractions within 40 kilometers of their homes.

	Older to mature empty nesters	Modest younger households living in urban areas
Interests	Sporting events, craft shows, community theatre, gardens & parks	Fairs, food & wine shows, craft shows, community theatre, concerts
Background	Live in less urban areas, less likely to be culturally diverse	Blue collar, trades
Motivation	Vitality, committed to health and supporting the community	Need for escape, choose ethical companies, support small businesses
Household Income	Average	Below average
Preferred Media	Moderate internet users	Heavy internet users, Facebook
Market size in Ontario	21%	8.6%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Local Target Audiences and Markets: Breweries, Cideries & Distilleries

Local visitors enjoying community attractions within 40 kilometers of their homes.

	Upscale older suburban & rural families	Retired older to mature suburban empty-nesters
Interests	National or provincial parks, home shows, community theatre, boating	Sports, parks/city gardens, theatres and concerts, snowmobiling/boating
Background	Trades or college, white and blue collar	Trades or college, retired, less culturally diverse
Motivation	Need for escape, enjoy being one with nature, guided by reason	Utilitarian consumerism, enjoy being one with nature
Household Income	Above average	Below average
Preferred Media	Moderate internet users	Light internet users
Market size in Ontario	16.2%	9.5%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Local Target Audiences and Markets: Farmers' Markets

Local visitors enjoying community attractions within 40 kilometers of their homes.

	Mature Singles & Couples	Older Suburban Singles & Couples
Interests	Beer/food/wine festivals, home and craft shows, community theatre	Parks/city gardens, theatre, concerts, home and craft shows
Background	Live in less urban areas, less likely to be culturally diverse	Blue collar, trades
Motivation	Need for escape, proud Canadians	Need for escape, choose ethical companies, small businesses
Household Income	Below average	Below average
Preferred Media	Moderate internet users	Light internet users
Market size in Ontario	26.9%	18.6%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Local Target Audiences and Markets: Museums & Heritage Sites

Local visitors enjoying community attractions within 40 kilometers of their homes.

	Older suburban couples	Single urbanites living in apartments
Interests	Sporting events, craft shows, community theatre, gardens & parks	Music festivals, concerts, theatre, home shows
Background	Live in less urban areas, less likely to be culturally diverse	Blue collar, trades
Motivation	Need for escape, being one with nature, trust small businesses	Need for escape, choose ethical companies, small businesses
Household Income	Average	Below average
Preferred Media	Light internet users	Heavy internet users
Market size in Ontario	24.4%	8.1%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Non-Local Target Audiences and Markets: Foodie Destinations, Food Trails & Festivals

Visitors that travel more than 40 kilometers to enjoy community attractions.

	Older suburban & rural families and couples	Diverse upscale urban families	Older to mature singles living in suburban areas
Interests	National and provincial parks, theatre, concerts, power boating	Theme parks, professional sports, snowboarding, adventure sports	Sporting events, theatre and concerts, fishing, hunting, golfing
Background	Trades or college, less likely to be culturally diverse	Well educated, white collar, strong South Asian community	Trades or college, less likely to be culturally diverse
Motivation	Want control, trust small businesses, enjoy being one with nature	Need for escape, price matters, brand matters, trust advertising	Enjoy being one with nature, prefer ethical companies, trust small businesses
Household Income	Above average	Well above average	Below average
Preferred Media	Light internet users, Pinterest	Radio, TV, moderate internet users, Instagram, Twitter, Snapchat, Pinterest	Radio, TV, newspaper, light internet users, Facebook
Market size in Ontario	23%	11.6%	10.9%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Non-Local Target Audiences and Markets: Breweries, Cideries & Distilleries

Visitors that travel more than 40 kilometers to enjoy community attractions.

	Middle aged to older suburban families	Retired midscale mature suburban empty nesters	Older to mature rural couples
Interests	National or provincial parks, professional sports, craft shows	Sports, parks/city gardens, theatres and concerts, snowmobiling/boating	Home and craft shows, parks/city gardens, theatres and concerts
Background	Trades or college, white and blue collar	Trades or college, retired, less culturally diverse	No certificate/diploma or trades
Motivation	Need for escape, want control, reject order, optimistic	Proud Canadians, need to escape, trust small businesses	Enjoy being one with nature, guided by reason and logic
Household Income	Above average	Average	Below average
Preferred Media	Moderate internet users	Light internet users	Light internet users
Market size in Ontario	12%	7.1%	12.8%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Non-Local Target Audiences and Markets: Farmers' Markets

Visitors that travel more than 40 kilometers to enjoy community attractions.

	Older mature empty nesters	Retired empty nesters living in rural areas	Diverse young / middle aged urbanites
Interests	Sporting events, parks/gardens, theatres and concerts	Music festivals, theatres, concerts, home and craft shows	Film festivals, ballet/opera, dancing/night life
Background	Trades or college, less likely to be culturally diverse	Well educated, white collar, less likely to be culturally diverse	Well educated, white collar, culturally diverse
Motivation	Guided by reason, need for escape, enjoy being one with nature	Guided by reason, enjoy being one with nature, prefer ethical companies	Value authentic brands, pursuit of originality, committed to health,
Household income	Below average	Well above average	Average
Preferred media	Light internet users, Pinterest	Light internet users, Pinterest	Heavy internet users, LinkedIn, Twitter, YouTube
Market size in Ontario	7.7%	5.2%	8.8%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Non-Local Target Audiences and Markets: Angling

Visitors that travel more than 40 kilometers to enjoy community attractions.

	Older rural couples	Middle aged suburban families with school aged children
Interests	Sporting events, parks & gardens, theatre, concerts, boating	Sporting events, national and provincial parks, outdoor sports
Background	Trade, blue collar	White collar, less culturally diverse
Motivation	Enjoy nature, trust small businesses need for escape	Want control, committed to health, need to escape
Household income	Below average	Well above average
Preferred media	Light internet users	Moderate internet users
Market size in Ontario	12.3%	8.5%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

# Non-Local Target Audiences and Markets: Museums & Heritage Sites

Visitors that travel more than 40 kilometers to enjoy community attractions.

	Diverse mature singles	Retired older rural empty-nesters
Interests	Film festivals, historical sites, concerts	Sporting events, national and provincial parks, outdoor sports
Background	Grey collar	College or trades, retired
Motivation	Need for escape, trust small businesses, guided by reason	Enjoy nature, guided by reason, trust small businesses
Household income	Below average	Below average
Preferred media	Light internet users	Light internet users
Market size in Ontario	9.3%	13%

NOTE: Audience and market profiles are directly sourced from Destination Ontario and are intended as a resource to support marketing efforts. Destination Ontario provides summary documents containing the methodology, segment summary, and highlights for each product category. Target postal codes are also available. (<https://www.destinationontario.com/en-ca/corporate/research-and-insights#segmentation>)

## RTO9 Consumer Profile Key Insights

- 1 Frequent travellers and previous visitors to the region are most likely to visit again
- 2 Over half of visitors are under 45 years of age
- 3 The couples market is the most promising
- 4 Non-native born/New Canadians are somewhat more likely to be considering South Eastern Ontario as a destination
- 5 There is little differentiation in the profile and preference of those interested in the region
- 6 Visiting friends and family and “just needing a break” are primary reasons for travel

**Alphabet**<sup>®</sup>

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Twenty31 Consulting is a research and innovation-based management consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.

Alphabet<sup>®</sup> is a brand consulting firm delivering strategic guidance to destination management organizations, tourism regions and operators. We deliver executable and measurable brand strategy guided by research and implemented with a view to exceeding industry best practices.

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