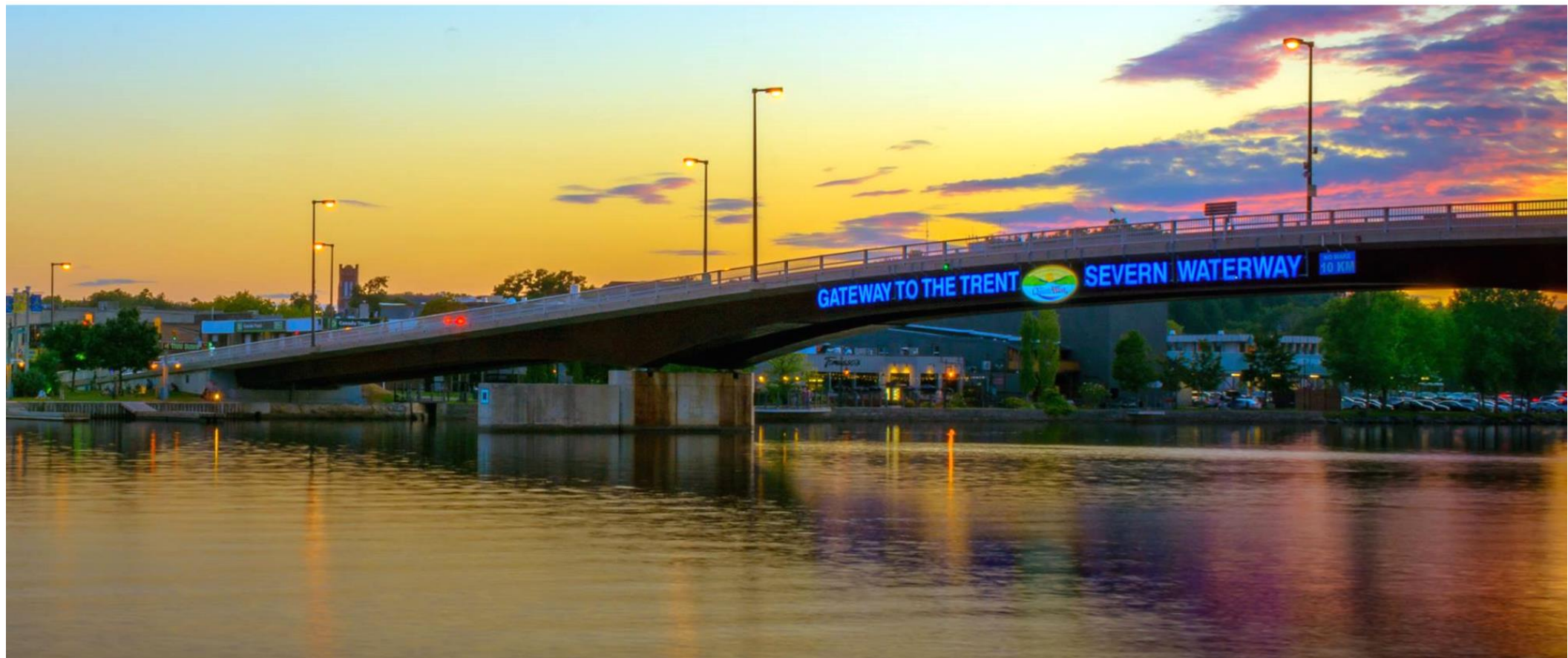


QUINTE WEST TOURISM DEVELOPMENT STRATEGY

2021





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01

EXECUTIVE SUMMARY

QUINTE WEST TOURISM DEVELOPMENT STRATEGY



A forward-thinking destination

Tourism product development that is business-focused and well-planned is the bedrock of a forward-thinking travel destination. This vital work usually happens behind the scenes, takes incredible patience and fortitude, and seems to move at a glacial pace. But, like the Bleasdel Boulder, product development work creates something striking and unique, exactly what is needed for a prosperous future for the tourism economy.

The City of Quinte West has chosen an opportune time to consider maximizing the Visitor economy's benefits. Industry projections suggest that tourism operators in smaller communities are well-positioned to take advantage of the pent-up travel demand of a post-pandemic economy. By creating a Tourism Development Strategy now, the City of Quinte West has identified the core tourism areas for growth. This roadmap will guide activities and investment, set out steps to achieve goals, and reaffirm the municipality's commitment to this important sector.

Accomplishments to build upon

Quinte West has many accomplishments to celebrate. Successes along the waterfront include Trent Port Marina, arguably the most liked facility of its kind east of Toronto. There is a new boat launch at Ontario Street, and improvements are scheduled at Centennial Park boat launches. The Trenton Rowing & Paddling Club is a great success. Achievements are not limited to the waterways: Batawa's outdoor skating rinks, natural playground, and mountain biking trails are enviable assets. Trail expansions will connect parks and attractions, such as the proposed path from Bain Park to Centennial Park, which has received upgrades to electrical for events, as well as amphitheatre and washroom improvements, not to mention the much-lauded Pop-Up project.





On top of infrastructure improvements such as public wi-fi in downtown Trenton and upgrades to wayfinding signage, recreation and sports is drawing visitors: the Dudley Hewitt Cup and Eastern Canada Cup hockey events, annual Pond Hockey Classic, the addition of new ball diamond and field lighting, and the excitement of the 2024 Canada Soccer Toyota National Championships, a bid recently awarded.

In 2020, despite pandemic restrictions, the Bay of Quinte region experienced a summer of strong visitation, especially from the Greater Toronto Area and Quebec. The region's hotel occupancy percentage was among Canada's Top 3 and finished less affected than other markets in the nation.

An economic impact assessment formed part of the strategic planning process (page 42). Taking account of its direct, indirect, and induced impacts, the tourism industry of Quinte West generated \$15.2 million of constant 2012 dollars GDP in 2016 and supported a total of 270 jobs. For the strategy, tourism assets were catalogued and analyzed (page 35). There are nine major tourism attractions in Quinte West, which drive significant visitor traffic. The asset analysis revealed a solid base of 39 emerging attractions and 160 supporting assets with the potential to nurture a thriving local tourism sector.

Strengths and aspirations

An examination of Quinte West's strengths from a tourism perspective summarized key waterfront assets such as the Bay of Quinte and the Trent-Severn Waterway. Established, quality tourism attractions, as well as committed municipal government support, helps to maintain a robust regional tourism ecosystem. Tourism stakeholders aspire to build upon the area's image as an outdoor recreation hub, build more tourist accommodation of all types, increase overnight stays in shoulder seasons and winter, and develop water-based experiences – such as more access points for kayaks and stand-up paddleboards, and new houseboat cruising opportunities.

Business owners, Quinte West residents, and tourism experts were engaged as part of the strategy development, including over 500 participants in a community survey, industry workshops, interviews and discussions (page 37). Local citizens are supportive of tourism, with 94% agreeing that “tourism is good for the community” and the same number agreeing that “tourism makes a valuable contribution to the local economy”. Businesses are witnessing growing consumer demand for outdoor experiences that can reinforce the City's slogan, *A Natural Attraction*. Stakeholders prioritized waterfront and river development, as well as monetized tourism-related activities for boating, fishing, and trails. Operators appreciate municipal support for tourism but want a clear strategy, incentives to kickstart tourism in the post-pandemic period, and celebrations of local successes. Regional coordination, building on neighbour communities' successes, and industry training and networking, were other operator desires and hopes.

Complex, interlocking mandates

Tourism development and promotion is a complex set of interlocking mandates involving many agencies serving a multifaceted group of businesses and community organizations, large and small. A service delivery analysis reviewed the missions shared by the public sector to support tourism (page 35). Among the mandates identified as needing improvements were loans and grants for tourism businesses and organizations, facilitation of new and improved tourism products and experiences, workshops for operators, and directional signage so



tourists can find their way to their destination.

Three comparable communities were benchmarked during this project, helping Quinte West learn from their respective approaches (page 40). What was learned? Communities wishing to develop their tourism economy should focus on product development as the foundation for marketing efforts, concentrate on tourism investment to ensure the sector grows sustainably, make waterfront development a priority, and support regional collaboration to spur creativity and improve productivity.

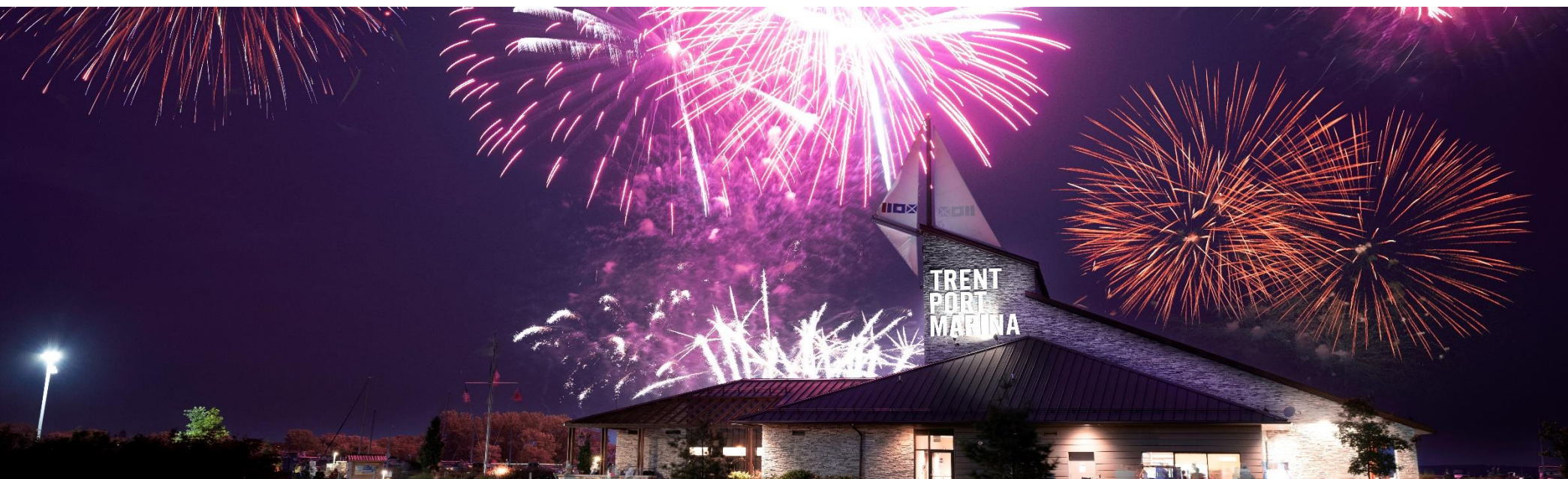
Desired outcomes

Ultimately, tourism stakeholders envisioned a well-rounded list of outcomes they desire from implementing this strategy. They want improved quality, quantity, and diversity of tourist accommodations; increased public funding for tourism attraction and retention efforts; supports for local operators to scale up offerings; better access to data on visitor spending and sentiment; and overall tourism business viability and resilience, buoyed by a skilled and satisfied workforce.

Based on the tourism vision, mission, guiding principles, and research and engagement findings, three strategic priorities were crafted:

- Industry Collaboration
- Market Readiness
- Operator Supports

Quinte West is clearly serious about growing its tourism sector. The recommendations, actions, and steps that follow, along with the accompanying technical report, were driven by extensive stakeholder engagement and objective analysis. They can act as a roadmap to improvement, cultivating Quinte West's tourism sector for years to come, building upon its magnificent natural assets, welcoming residents, and professional tourism industry operators.





02

FOUNDATIONS FOR TOURISM DEVELOPMENT

QUINTE WEST TOURISM DEVELOPMENT STRATEGY



Definition of Tourism

Tourism is a social, cultural, and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which involve tourism expenditure.¹

Impact of Tourism

Tourism is one of Canada's largest economic sectors, generating total revenues of \$98 billion annually, and accounting for 2% of Canada's GDP.² Tourism is a rich source of jobs for Canadians. Tourism offers significant entrepreneurial opportunities. Small and medium-sized enterprises make up 99% of the companies in Canada's tourism sector. Tourism helps stimulate trade between countries as it enables face-to-face meetings that are crucial to overcoming linguistic and cultural barriers.

Tourism is Canada's largest service export

Destination Canada reminds us that foreign currency is used to purchase Canadian services, making tourism an export by definition. In fact, tourism is Canada's largest service export, worth \$43.7 billion in Tourism Gross Domestic Product in 2019. There is a clear positive relationship between international arrivals and exports in the subsequent year: a 1% increase in arrivals to Canada leads to growth in Canadian exports by \$817 million over the following two years, as well as an increase in the range of goods and services exported.

For Quinte West, it's not just international visitors that support the local tourism sector and generate wealth. Tourism in Quinte West includes anyone who arrives from outside of the municipality's boundaries.

Local spending is not tourism

Spending by locals on recreation, culture, entertainment, retail and meals is the recirculation of existing community wealth and is not considered tourism. However, local spending by locals is always encouraged because it reduces the amount of dollars leaving the area. Local spending opportunities should be addressed in retail market studies, recreation master plans, cultural plans, or buy-local campaigns.

¹ Source: World Tourism Organization (UNWTO), the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism.

² Destination Canada: Unlocking the Potential of Canada's Visitor Economy, December 2018

TOURISM VISION, MISSION, GUIDING PRINCIPLES & STRATEGIC PRIORITIES

VISION

for Quinte West's Tourism Industry

Quinte West is a natural attraction, nurtured by community and business, and welcoming to a diverse range of respectful visitors.

MISSION

for Quinte West's Tourism Industry

Through infrastructure investments and program delivery, the City of Quinte West supports a healthy, vibrant tourism industry, fostering local economic and business growth and regional prosperity through partnership opportunities.

GUIDING PRINCIPLES

Based on the The Future of Tourism Coalition

- See the whole picture
- Use sustainability standards
- Collaborative destination management
- Quality over quantity
- Demand fair income distribution
- Reduce tourism's burden
- Redefine economic success
- Mitigate climate impacts
- Close the loop on resources
- Contain tourism's land use
- Diversify source markets
- Protect sense of place
- Operate business responsibly

STRATEGIC PRIORITIES

for Quinte West's Tourism Industry

- Industry Collaboration
- Market Readiness
- Operator Supports



03

STRATEGIC PRIORITIES FOR QUINTE WEST TOURISM

QUINTE WEST TOURISM DEVELOPMENT STRATEGY



Strategic Priorities

Strategic priorities for Quinte West's tourism industry were summarized into three pillars: Industry Collaboration, Market Readiness, and Operator Supports. Central to the Tourism Development Strategy is Tourism Service Delivery, which includes the various programs, tactics, and initiatives carried out by the organizations involved: City of Quinte West, Bay of Quinte Marketing Board, Quinte West Chamber of Commerce, RTO9 Southeastern Ontario, and others.

Industry Collaboration

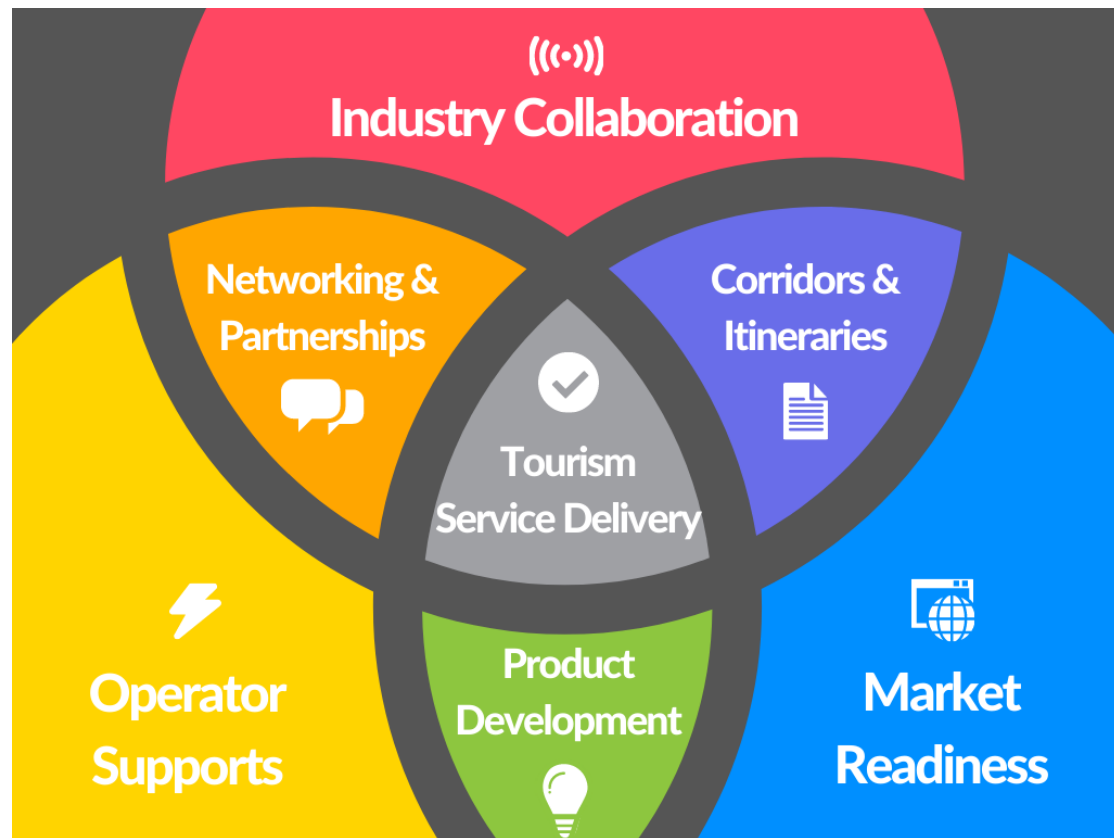
Tourism operators are supported through networking and partnerships that build collaboration and successes amongst tourism service-delivery organizations.

Market Readiness

Market-ready tourism products are expanded by creating tourism corridors and experience-based itineraries for mainstream and emerging consumer markets.

Operator Supports

Enhanced tourism products are realized by implementing financial and other supports for tourism operators.





Strategic Priority #1: Industry Collaboration

Action

Action 1: Double-down on networking and learning opportunities for the tourism industry.

Rationale

When tourism operators were asked what they wanted to see in a tourism development strategy, they quickly articulated the importance of better coordination, increased awareness of City supports, more product development, and the need for a regional lens on tourism activity. Tourism operators are eager to work with the City and other organizations to build clear actions for moving forward. This tourism development strategy is evidence that Quinte West's City Council is supportive. Creating clear pathways to collaborations between the public and private sectors will build trust, uncover funding and support from various sources, and reinforce the commitment to invest.

What Can Happen Now?

Tourism business operators and support organizations appreciate the City's approach to tourism development to date, given the kind words directed toward municipal staff. An excellent, collegial relationship between the private and public sectors already exists. With support from Council, City staff can re-allocate existing and new funds to amplify collaboration within the tourism industry through direct contact, events, workshops, conferences, tours, and networking. City staff should also continue to connect and regularly visit with tourism operators, adding value and providing advice and information whenever possible.

Guiding Principles

- See the whole picture
- Collaborative destination management
- Redefine economic success
- Protect sense of place



Figure 1: Tourism Business Speed-Matching, Scuba Diving Conference, Philippines



Action 1: Double-down on networking and learning opportunities for the tourism industry.

STEPS	Step 1a: Organize regular tourism industry events where local operators can meet peers and develop relationships.	Step 1b: Provide opportunities for tourism operators to expand their knowledge and expertise.
TACTICS	<ul style="list-style-type: none"> Coordinate annual tourism-focused industry engagement opportunities (regional tourism conferences are encouraged). Run speed-matching gatherings to encourage collaborations between tourism operators. Provide paths to partnerships and clusters. Promote shared procurement, workforce pools, and other cooperative concepts. Organize an annual tour of key tourism attractions. 	<ul style="list-style-type: none"> Organize regular workshops and presentations for tourism operators. Share new technologies for promotions, booking, and organizing. Communicate best practices and examples of productivity gains.
APPROACH	<ul style="list-style-type: none"> Time Frame: Ongoing Action Type: Quick Win 	<ul style="list-style-type: none"> Time Frame: Ongoing Action Type: Start/Stop
EXAMPLES	<ul style="list-style-type: none"> NYC Tourism Ready Philippines Dive Travel B2B Exchange (Figure 1) Norfolk County Tourism Business Speed-Matching 	<ul style="list-style-type: none"> Southwestern Ontario Tourism Training Workshops RTO7 Tuesday Tutorials Tourism Council Western Australia Training Workshops
PARTNERS	<ul style="list-style-type: none"> RTO9 Southeastern Ontario Trenval Business Development Corp. Regional Chambers of Commerce and Downtown Business Improvement Areas Bay of Quinte Regional Marketing Board and Municipal Partners Prince Edward County Tourism Staff Tour operators in target markets 	



Strategic Priority #2: Market Readiness

Actions

Action 2: Align and leverage tourism products and experiences.

Action 3: Focus on target customers and anchor staging areas.

Action 4: Stabilize infrastructure and marketing.

Rationale

Quinte West's tourism operators and support organizations are well aware of assets that residents and visitors to the region enjoy. Quinte West is located on the Bay of Quinte and straddles the southern end of the Trent-Severn Waterway, enjoying a fortunate array of outdoor recreation experiences such as Trent Port Marina, Batawa Ski Hill and Trails, Frankford Tourist Park, and Sager Conservation Area. Arguably the most highly regarded pleasure marina east of Toronto is just steps from downtown Trenton. The Quinte Museum of Natural History is planned for the water's edge. The best use for the Trenton Town Hall 1861 building should be determined, including opportunities for connections with the arts and other types of downtown revitalization. The Trent-Severn Waterway connects Quinte West's urban core with attractions in the rural north. During the pandemic, traffic generally increased for outdoor-based tourism businesses and camping, where permitted. In fact, across the region, some geographic areas – beaches, specifically – experienced over-tourism. Pent-up demand by consumers will be unleashed when pandemic restrictions are lifted, so the industry must be prepared to avoid backlash from local citizens. Flows of visitors shape the evolution and perception of tourism destinations, and the tourism industry should seek to understand those flows and intervene to develop them further.

Figure 2: Waterfront / Outdoor Corridor Concept





According to new research³, visitor flows (sequences within a trip) are affected by trajectories (intentional directions and/or flexible decisions within a trip) and corridors (activities and attractions in proximity). Applying this learning can help the tourism industry make sense of traveller motivations, better predict choices, and design corridors. In Quinte West, three natural visitor flows appear to be ripe for interventions: marina/downtown, Trent-Severn Waterway (Figure 2), and agricultural/rural.

What Can Happen Now?

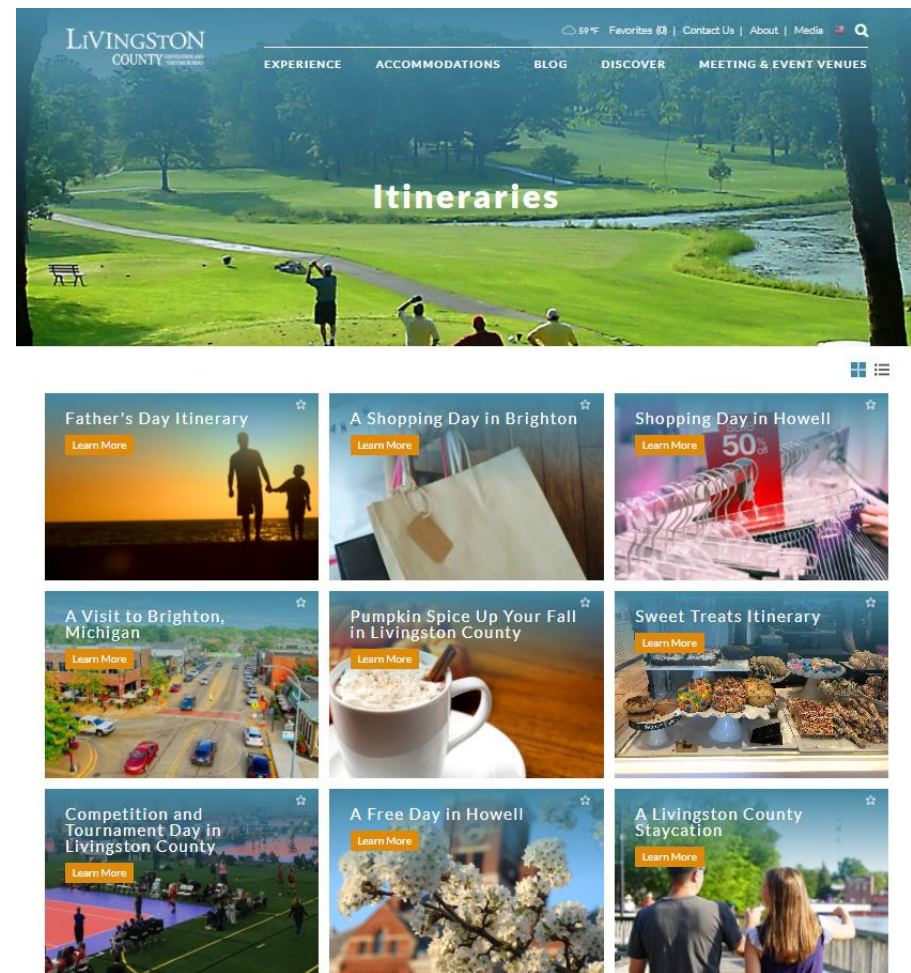
Businesses support clusters of activity that highlight their strengths, so sketching out the alignments should be the first step in modifying marketing and product development. Quinte West is already investing in boat ramps and has embarked on a significant investment in its waterfront parks for motorized access to the Bay of Quinte. In rivers and canals, stand-up paddleboard enthusiasts, kayakers, and canoeists could be encouraged to launch in increasing numbers along more tranquil waters. Connecting the dots represented by Quinte West's agriculture sector has already started with a database prepared by Harvest Hastings.

Guiding Principles

- Use sustainability standards
- Quality over quantity
- Reduce tourism's burden
- Contain tourism's land use
- Diversify source markets

³ Pietro Beritelli, Stephan Reinhold, Christian Laesser, "Visitor flows, trajectories and corridors: Planning and designing places from the traveler's point of view", *Annals of Tourism Research*, Volume 82, 2020, 102936.

Figure 3: Itineraries for Livingston County, Michigan





Action 2: Align and leverage tourism products and experiences.

STEPS	Step 2a: Develop itineraries showcasing experiences along tourism corridors.	Step 2b: Divert traffic from over-tourism bottlenecks in neighbouring communities.
TACTICS	<ul style="list-style-type: none"> Create detailed itineraries for each type of experience in Quinte West, link them to tourism businesses, and upload them to the website. (Figure 3) Utilize tools such as signage and street markings and activations such as pop-up retail, street entertainment, and local food to drive foot traffic along walking routes between Trent Port Marina and Downtown Trenton. Connect outdoor recreation experiences along the Trent-Severn Waterway, from Trenton to Batawa to Frankford to Sager Conservation Area, to drive tourist traffic into Quinte West rural areas. Establish a Quinte West Food Crawl, linking local food and drink sources, farm markets and agritourism experiences across the municipality. 	<ul style="list-style-type: none"> Analyze regional tourism traffic patterns and timing. Host events and promotions on days and times aligned with over-capacity situations in Prince Edward County. Promote overflow itineraries in over-capacity areas of Prince Edward County.
APPROACH	<ul style="list-style-type: none"> Time Frame: Plan in 2021-2022, implement in 2022-2023 Action Type: Quick Win 	<ul style="list-style-type: none"> Time Frame: Plan in 2022, implement in 2023 and beyond Action Type: Long Haul
EXAMPLES	<ul style="list-style-type: none"> Itineraries, Livingston County, Southeast Michigan North Grenville Foodies Delight Day Trip Itinerary Kentucky Bourbon Trail Itineraries Ireland's Wild Atlantic Way 	<ul style="list-style-type: none"> UNWTO Overtourism Report Sustainable Tourism – Tips for Small Towns and Rural Areas MapBox and Twitter data from GNIP – spatial behaviour of locals and tourists
PARTNERS	<ul style="list-style-type: none"> Bay of Quinte Marketing Board RTO9 Southeastern Ontario Prince Edward County (stakeholders to be determined) 	



Action 3: Focus on target customers and anchor staging areas.

STEPS	Step 3a: Adapt tourism product offerings and service delivery by paying attention to the end user's desires.	Step 3b: Leverage anchor spaces as stages for scheduled experiences, activations, and event marshalling.	Step 3c: Link food and drink producers and purveyors with foodies and locavores.
TACTICS	<ul style="list-style-type: none"> Work with recreational fishing influencers and advocates to develop sustainable angling opportunities, such as more angling events, improved facilities, local culinary connections, and sponsorship opportunities and amenities at the City's boat launches. Adapt niche tourism products and marketing tactics to other unique tourists, such as francophones, New Canadians, visitors with disabilities. 	<ul style="list-style-type: none"> National Air Force Museum of Canada hosting local food and drink events and tours, military-style outdoor dinners, fitness and outdoor activity tours. Trent Port Marina and Bayshore Park hosting music concerts, entertainment, pop-up retail, food trucks. Quinte West Farmers' Market and Jack Lange Memorial Walkway hosting signature weekly tourism event, music series, outdoor local food harvest dinners Centennial Park hosting music concerts, entertainment, pop-up retail, food trucks. Mount Pelion Park hosting military-style fitness tours, walking track, washrooms. Batawa hosting mountain bike trails, outdoor skating, skiing, music events with camping. Frankford Tourist Park and Trent-Severn Waterway banks hosting trails, cycling, military-style fitness and survival camping, ruck marches, outlooks. 	<ul style="list-style-type: none"> Bring together farmers, chefs, event organizers, and retailers to develop local food and drink experiences, trails, and events. Recruit local food ambassadors (amateur or professional) and food travel bloggers to promote on-farm experiences, farm markets, restaurants, farmers, and chefs.
APPROACH	<ul style="list-style-type: none"> Time Frame: Plan fishing in 2022 for ongoing implementation in spring 2023; plan other niche markets in 2023 for 2024 implementation Action Type: Start/Stop 	<ul style="list-style-type: none"> Time Frame: Plan in 2021-2022, ongoing implementation starting fall 2022 Action Type: Long Haul 	<ul style="list-style-type: none"> Time Frame: Plan in 2022 for ongoing implementation starting in summer 2023 Action Type: Long Haul



STEPS	Step 3a: Adapt tourism product offerings and service delivery by paying attention to the end user's desires.	Step 3b: Leverage anchor spaces as stages for scheduled experiences, activations, and event marshalling.	Step 3c: Link food and drink producers and purveyors with foodies and locavores.
EXAMPLES	<ul style="list-style-type: none"> ▪ Saugeen River and Lake Huron Fishing ▪ Recreational fishing organizations ▪ Bow River Overnight Fishing Trip ▪ Route Champlain ▪ Ontario Parks Learn-to-Camp Program ▪ Batawa Accessible Customer Service Policy 	<ul style="list-style-type: none"> ▪ Fit Tours NYC ▪ The Fitness Tourist ▪ Survival holidays ▪ PEI Cycling Itineraries 	<ul style="list-style-type: none"> ▪ Old Stocks Inn Foodie Trails ▪ West Cork Food Festival ▪ Eat & Drink Norfolk ▪ Fairly Fat Guys – Local Food Ambassadors
PARTNERS	<ul style="list-style-type: none"> ▪ Recreational fishing organizations ▪ RTO9 Southeastern Ontario ▪ Bay of Quinte Marketing Board ▪ Société Économique de l'Ontario ▪ Le Corridor Patrimoine, Culture et Tourisme Francophone Canada ▪ Quebec Travel Bloggers 	<ul style="list-style-type: none"> ▪ National Air Force Museum of Canada ▪ Batawa Development Corp. ▪ Private landowners of Bayshore Park that surrounds Trent Port Marina ▪ Parks Canada ▪ Canadian Forces Liaison Council ExecuTrek Program ▪ PSP Fitness & Sports 8 Wing CFB Trenton ▪ Parks Canada 	<ul style="list-style-type: none"> ▪ Harvest Hastings ▪ Bay of Quinte Marketing Board ▪ RTO9 Southeastern Ontario ▪ Ontario Ministry of Agriculture Food and Rural Affairs (OMAFRA)



Action 4: Stabilize infrastructure and marketing.

STEPS	Step 4a: Develop a waterfront master plan connecting tourism assets.	Step 4b: Expand internet so tourism operators can connect to customers.	Step 4c: Help tourists find their way around.	Step 4d: Reinforce collaborations with marketing partners.
TACTICS	<ul style="list-style-type: none"> Map nodes of outdoor tourism activity and waterfront access along the Bay of Quinte, Trent-Severn Waterway, and Murray Canal. Connect the waterfront and outdoor tourism assets to trailheads, conservation areas and other sites, and boat launches. 	<ul style="list-style-type: none"> Rural connections. Reliable, high-speed public wi-fi in commercial areas. 	<ul style="list-style-type: none"> Develop a pay-to-play tourism business directional signage program. Improve public wayfinding signage. Use sidewalk and street markings to lead tourists from Trent Port Marina to Downtown Trenton. 	<ul style="list-style-type: none"> Continue to support the Bay of Quinte Regional Marketing Board Create a City of Quinte West tourism industry advisory working group to provide operator advice and support for City staff representation at the regional level. Explore new ways to elevate Quinte West's tourism experiences within the Bay of Quinte marketing plan. Focus on improving and promoting Quinte West experiences rather than simply pushing the Quinte West brand. Continue to explore alliances and cooperation opportunities with the tourism industries of Prince Edward County and other neighbouring communities.
APPROACH	<ul style="list-style-type: none"> Time Frame: Develop master plan in 2024, implement in 2025 and beyond Action Type: Long Haul 	<ul style="list-style-type: none"> Time Frame: Begin planning in 2021, implement in 2022 and beyond Action Type: Long Haul 	<ul style="list-style-type: none"> Time Frame: Develop plan in 2021-2022, implement in 2022 and beyond Action Type: Quick Win 	<ul style="list-style-type: none"> Time Frame: Ongoing; develop terms of reference for tourism advisory group in 2021 for winter 2022 implementation Action Type: Start/Stop



STEPS	Step 4a: Develop a waterfront master plan connecting tourism assets.	Step 4b: Expand internet so tourism operators can connect to customers.	Step 4c: Help tourists find their way around.	Step 4d: Reinforce collaborations with marketing partners.
EXAMPLES	<ul style="list-style-type: none"> ▪ Township of South Stormont Waterfront Development Plan ▪ Georgina Waterfront Parks Master Plan ▪ Barrie Waterfront & Marina Strategic Plan 	<ul style="list-style-type: none"> ▪ Fit Tours NYC ▪ The Fitness Tourist ▪ Survival holidays 	<ul style="list-style-type: none"> ▪ Halton Region Tourism-Oriented Directional Signage ▪ Roadsworth Street Art Examples ▪ Norfolk County Tourism Directional Signage Program 	<ul style="list-style-type: none"> ▪ Grey Highlands Tourism Advisory Committee Terms of Reference ▪ Port Hardy Tourism Advisory Committee Terms of Reference ▪ Cruise the Coast Motorcycle Tourism Alliance
PARTNERS	<ul style="list-style-type: none"> ▪ Parks Canada ▪ Trent-Severn Waterway ▪ Lower Trent Conservation Authority ▪ Quinte Conservation Authority ▪ Private land owners 	<ul style="list-style-type: none"> ▪ Quinte Economic Development Commission ▪ Internet Service Providers ▪ Ontario East Economic Development Corp. ▪ Government of Canada ▪ Government of Ontario 		<ul style="list-style-type: none"> ▪ City of Quinte West ▪ Bay of Quinte Marketing Board ▪ RTO9 Southeastern Ontario ▪ Prince Edward County ▪ Quinte West tourism business representatives



Strategic Priority #3: Operator Supports

Actions

Action 5: Fast-track tourism-friendly policy changes.

Action 6: Co-invest in product development with tourism operators.

Rationale

During workshop consultations, interviews and surveys, tourism operators in Quinte West clearly communicated the need for more support services from the City, ranging from product knowledge of other tourist attractions to help on the digital transformation of their business methods. With the establishment of the Municipal Accommodation Tax, operators expect the City to utilize these revenues to build the resilience and success of the tourism industry as a whole.

City staff are exceptionally well networked with other organizations and agencies to support tourism operators, but there are other ways to improve municipal service delivery. With better positioning, Quinte West could attract major music festivals similar to the Gentlemen of the Road (Mumford and Sons) model, which the community was shortlisted for in the past.

What Can Happen Now?

The City of Quinte West can begin immediately by combing through its policies to find ways to make them friendlier to the tourism industry. Every aspect of the City's programs and services that touch upon the tourism and hospitality sector – especially related to approval processes, regulatory frameworks, and fund mechanisms – should be reviewed and modified. A quick win for Quinte West would be the development of short-term rental accommodation to take advantage of pent-up demand. It would be advantageous to run all policy discussions through a permissive tourism-friendly lens, to ensure the highest level of flexibility possible.

Guiding Principles

- Collaborative destination management
- Quality over quantity
- Demand fair income distribution
- Redefine economic success
- Operate business responsibly

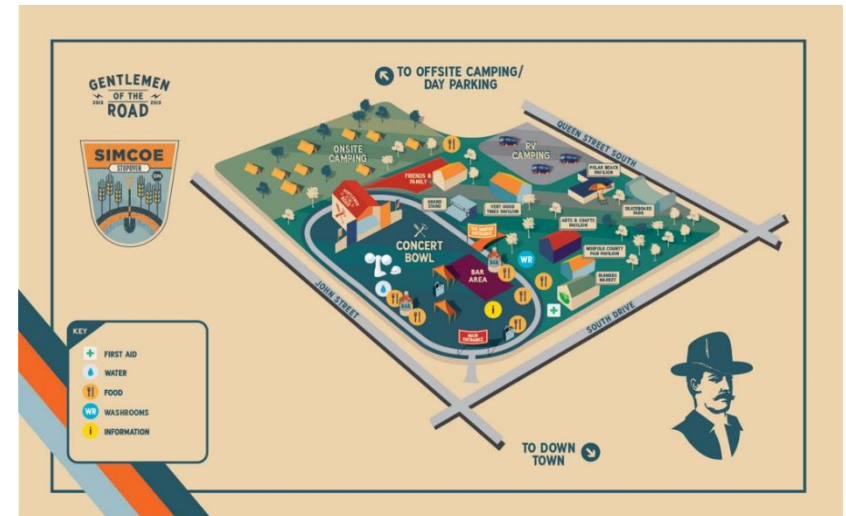


Figure 4: Mumford and Sons' Concert with Festival Camping



Action 5: Fast-track tourism-friendly policy changes.

STEPS	Step 5a: Modernize the Zoning By-Law to provide flexibility in the development of tourism businesses.	Step 5b: Create a Tourism Business Improvement Plan and other policies to encourage private-sector investment in tourism businesses.	Step 5c: Streamline the tourism event planning and approval process to assist organizers.
TACTICS	<ul style="list-style-type: none"> Allow on-farm experiences, overnight accommodation such as rental cottages and rental cabins, and camping in Agricultural Zones. Allow farm breweries, farm wineries, and farm distilleries, as-of-right, in Agricultural Zones. Allow micro-distilleries and craft breweries, as-of-right, in Downtown Zones. Clarify definitions of tourist establishments and tourist accommodation and allow short-term rentals to increase the inventory of overnight accommodation. Clarify definitions of camping establishments, tourist trailers and tourist vehicles and determine which zones they are permitted in. 	<ul style="list-style-type: none"> Prioritize the improvement of agricultural properties for tourist establishments, on-farm tourist accommodation, farm breweries, wineries, distilleries, and value-added food and drink processing. Prioritize the improvement of outdoor and water-based tourism experiences for rural land, open space, and waterfront land, buildings and facilities used for tourist establishments related to outdoor land-based and water-based activities. Prioritize the improvement in quantity and quality of overnight tourist accommodation on residential, rural, and agricultural properties to construct secondary suites and alternative tourist accommodation facilities. Establish a Short Term Accommodation rental policy that is friendly and flexible for small businesses, while ensuring quality assurance and guest safety, with the ultimate goal of increasing the inventory of overnight accommodation. 	<ul style="list-style-type: none"> Periodically run table-top exercises for tourism event planning to ensure volunteer groups and smaller operators can easily navigate the approvals process. Ensure tourism events are clearly defined to channel resources to appropriate proposals. Consider options for non-financial supports (e.g., staff support, fee waivers, etc.).
APPROACH	<ul style="list-style-type: none"> Time Frame: Review Zoning By-Law in 2021, implement changes before 2022 construction season Action Type: Quick Win 	<ul style="list-style-type: none"> Time Frame: Develop Tourism Business Improvement Plan in 2021, implement changes before 2022 construction season Action Type: Quick Win 	<ul style="list-style-type: none"> Time Frame: Plan in 2021 for 2022 implementation Action Type: Quick Win



STEPS	Step 5a: Modernize the Zoning By-Law to provide flexibility in the development of tourism businesses.	Step 5b: Create a Tourism Business Improvement Plan and other policies to encourage private-sector investment in tourism businesses.	Step 5c: Streamline the tourism event planning and approval process to assist organizers.
EXAMPLES	<ul style="list-style-type: none"> ▪ Norfolk County Zoning By-Law - On-Farm Diversification 	<ul style="list-style-type: none"> ▪ Haldimand County Rural Business and Tourism Community Improvement Plan ▪ Alternative Accommodation Toolkit (Elgin-Norfolk-Haldimand) ▪ Halton Region Agriculture Community Development Fund ▪ Bonavista, Newfoundland's approach to AirBnBs ▪ AirBnB information on MAT collection 	<ul style="list-style-type: none"> ▪ Richmond Hill Festival & Events Strategy ▪ Halton Hills Neighbourhood Block Party model ▪ Windsor-Essex Sports Tourism
PARTNERS	<ul style="list-style-type: none"> ▪ City of Quinte West Planning & Development Department ▪ Short-term accommodation booking platforms (e.g. AirBnB, etc.) 		<ul style="list-style-type: none"> ▪ City of Quinte West – appropriate departments

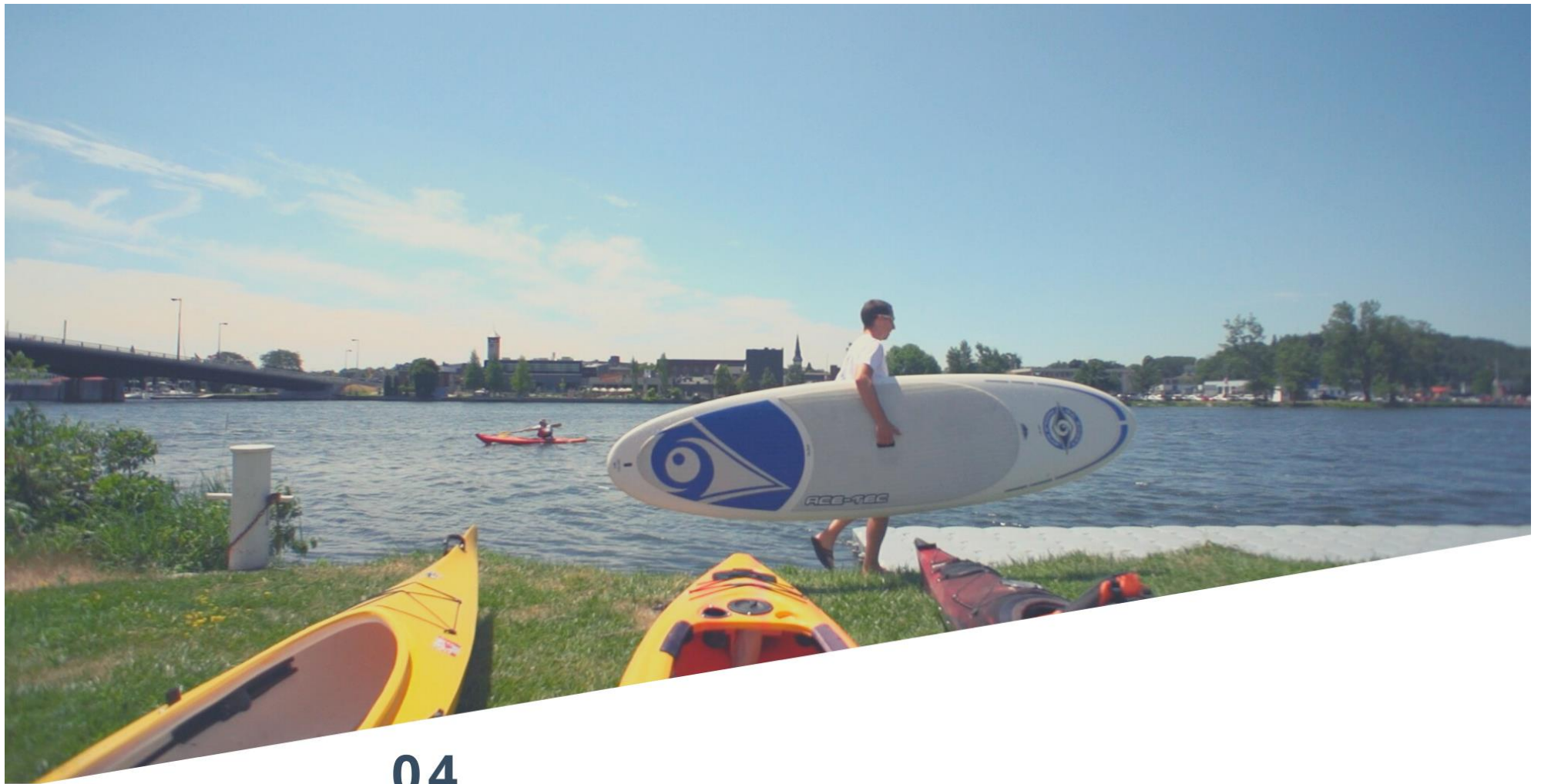


Action 6: Co-invest in product development with tourism operators.

STEPS	Step 6a: Invest in a Tourism Development Reserve using Municipal Accommodation Tax (MAT) revenues.	Step 6b: Ensure grants and loans in Tourism Business Improvement Plan are structured to increase investment in new and improved tourism products and experiences.	Step 6c: Provide municipal grants to non-profit organizations and social enterprises operating events and services for tourists.
TACTICS	<ul style="list-style-type: none"> ▪ Hire a Tourism Development Coordinator to kickstart implementation. ▪ Modify Municipal Accommodation Tax By-Law to collect revenues from Short Term Accommodation rentals. ▪ Purchase property to be converted to public tourism uses (e.g. waterfront access, parking). ▪ Purchase equipment to be used for tourism experiences (e.g. rental/shared bicycles, bike maintenance stands). ▪ Purchase materials for wayfinding signage. ▪ Fund larger Community Improvement Plan incentives (e.g., Batawa mountain bike trail improvements). ▪ Support new attractions (e.g. Natural History Museum) 	<ul style="list-style-type: none"> ▪ Develop agri-tourism by providing matching grants and/or interest-free loans for agricultural land owners to improve buildings and facilities used for tourist establishments, on-farm tourist accommodation, farm breweries, wineries and distilleries, and value-added local food and drink processing. ▪ Develop outdoor tourism by providing matching grants and/or interest-free loans for waterfront land owners to improve buildings and facilities used for tourist establishments related to outdoor and water-based tourism experiences. ▪ Develop the inventory of overnight tourist accommodation by providing incentives. 	<ul style="list-style-type: none"> ▪ Encourage gated festivals with temporary overnight tent camping in City parks, where appropriate. ▪ Expand pop-up retail experiences and mobile food premises along tourism corridors. ▪ Encourage monetization of guided, interpretive nature walks. ▪ Continue to support event bids for sports tournaments and competitions.
APPROACH	<ul style="list-style-type: none"> ▪ Time Frame: Develop investment plan in 2021 for implementation in 2022 and beyond ▪ Action Type: Long Haul 	<ul style="list-style-type: none"> ▪ Time Frame: Develop Tourism Business Improvement Plan in 2021, implement changes before 2022 construction season ▪ Action Type: Quick Win 	<ul style="list-style-type: none"> ▪ Time Frame: Plan in 2021 for 2022 implementation ▪ Action Type: Quick Win



STEPS	Step 6a: Invest in a Tourism Development Reserve using Municipal Accommodation Tax (MAT) revenues.	Step 6b: Ensure grants and loans in Tourism Business Improvement Plan are structured to increase investment in new and improved tourism products and experiences.	Step 6c: Provide municipal grants to non-profit organizations and social enterprises operating events and services for tourists.
EXAMPLES	<ul style="list-style-type: none"> Orillia MAT Tourism Reserve Fund Allocation 	<ul style="list-style-type: none"> Grey County Community Improvement Plan – Destination Infrastructure Grant Haldimand County Rural Business and Tourism Community Improvement Plan - Commercial Roofed Accommodations and Value-Added Agricultural Development Tax-Increment Grant 	<ul style="list-style-type: none"> Gentlemen of the Road Stopover Music Festival on-site camping (Figure 4)
PARTNERS	<ul style="list-style-type: none"> City of Quinte West – appropriate departments 	<ul style="list-style-type: none"> City of Quinte West Planning & Development Department 	<ul style="list-style-type: none"> Festival organizers Local sports and recreation clubs and associations Nature groups



04

SCOPE OF TOURISM SERVICES

QUINTE WEST TOURISM DEVELOPMENT STRATEGY



Scope of Tourism Services

Many organizations are involved in economic development tourism service delivery in the area (see Figure 5). A Tourism Service Delivery Analysis involved the four stakeholder agencies responsible for key tourism mandates in the City of Quinte West, including the City, the Chamber of Commerce, Bay of Quinte Marketing Board, and RTO9 Southeastern Ontario. The following tourism services were ranked as Very High or High Priority for the Tourism Development Strategy and were identified as needing service delivery improvements.

- Business / Organization Loans & Grants
- Marketing Tactics to Attract Tourists
- Tourism Product/Experience Development
- Tourism Business Retention & Expansion
- Tourism Business Support / Workshops
- Tourism Investment Attraction
- Directional Signage for Businesses/Attractions
- Wayfinding / Interpretive / Trail Signage

The following tourism services were ranked as Very High or High Priority for the Tourism Development Strategy and were considered to have effective service delivery currently.

- Regional Collaborations
- Municipal Accommodation Tax Administration
- Tourism/Hospitality Workforce Initiatives
- Political Advocacy
- Strategic Planning

Figure 5: Agencies involved in economic development and tourism in Quinte West and region





Public Facility Requirements

The City of Quinte West has a variety of high-quality public facilities that can be leveraged for tourism purposes, such as Trent Port Marina, Centennial Park, Mount Pelion, trails, and Frankford's campground.

Waterfront and Trails

The recommendations of the Tourism Development Strategy include a request for a master plan to be developed that encompasses all waterfront access in the municipality and connectivity of trails. This includes the Bay of Quinte waterfront and the Trent-Severn Waterway, Murray Canal, and all other bodies of water that could be accessible to the public. Consideration should be given to expanding public facilities along the Trent-Severn Waterway to allow for picnic areas and access for non-motorized watercraft such as stand-up paddleboards, kayaks, and canoes (Figure 6).

Trail facilities winding along the Trent-Severn Waterway and Bay of Quinte should be improved and connected to province-wide and national trail networks, where possible. Directional wayfinding signage and trailhead signage needs to be improved, as well as trail amenities and surface conditions, in order to grow the trail system to be competitive with other communities.

Cyclists should be considered when upgrading roads, including adding wide paved shoulders. Shoulder sweeping was witnessed during the consultant's visit, which is a very positive activity for cyclists.

Camping

As part of a master plan for waterfront access, campgrounds and areas that may be suitable for camping should be carefully analyzed from the perspective of their attributes as destinations for tourists and visitors. Providing transient camping that is conducive to hosting tourists can provide a significant economic impact bringing in new dollars from outside the community. Comfort camping facilities such as pods, yurts, oTENTiks, and safari tents, to be rented on a short-term basis, should also be seriously considered for these areas. An



Figure 6: Facilities for non-motorized watercraft should extend up the Trent-Severn Waterway



example of this is the parcel of land immediately north of the bridge next to Frankford Tourist Park Campground. Through an open-minded destination analysis and in cooperation with Parks Canada, this area should be reimaged to make the most of the economic benefit of the site from a tourism perspective – bringing new dollars to Frankford and Quinte West. A management strategy for the overall area is recommended.

Private-Public Partnerships

Partnerships may need to be developed with other landowners to advance these objectives. This is especially critical with Parks Canada, conservation authorities, and the private landowners of the property adjacent to Trent Port Marina.

Municipal Accommodation Tax, Staffing Structure, Capacity, and Professional Development

Recommendations within the report look at and beyond the transition from pandemic restrictions. Tourists are expected to express pent-up demand for the types of experiences that Quinte West offers. This is not the time to lower the City's commitment to tourism services, as businesses within the sector will need support in responding to short-term and long-term challenges and opportunities.

Current utilization of the MAT has been focused on the development of this strategy. Where possible in future, recommendations in this report point to utilize a portion of MAT revenues for a special tourism reserve fund, Community Improvement Plan incentives, and municipal grants to community groups focused clearly on tourism objectives, not general community events or services. The special tourism reserve could be utilized for large projects that will be of tangible benefit to the development of the tourism industry.

The current staffing structure is organized under the Planning & Development Services Department, which is advantageous for reviewing the Zoning By-Law and Community Improvement Plan recommendations within the report.

Tourism product development should be a renewed focus of the City staff. Consideration should be given to realigning the event planning program to assist with tourism development programs.

Enhanced professional development and training opportunities for City of Quinte West staff should be considered, such as attending conferences and sessions organized by the RTO, Economic Developers' Council of Ontario, and the Tourism Industry Association of Ontario. By staying on top of trends and best practices, City staff will have a well-developed, current understanding of opportunities and solutions. This will allow them to transfer knowledge and solutions to industry stakeholders more effectively.

To accelerate the Tourism Development Strategy and increase the City's capacity to respond to industry enthusiasm, it is recommended that Quinte West hire a Tourism Development Coordinator to kickstart implementation.

Under contract with the Quinte West Chamber of Commerce, in-market visitor services should be reviewed to ensure that staff and funding resources for tourism product development initiatives are prioritized.

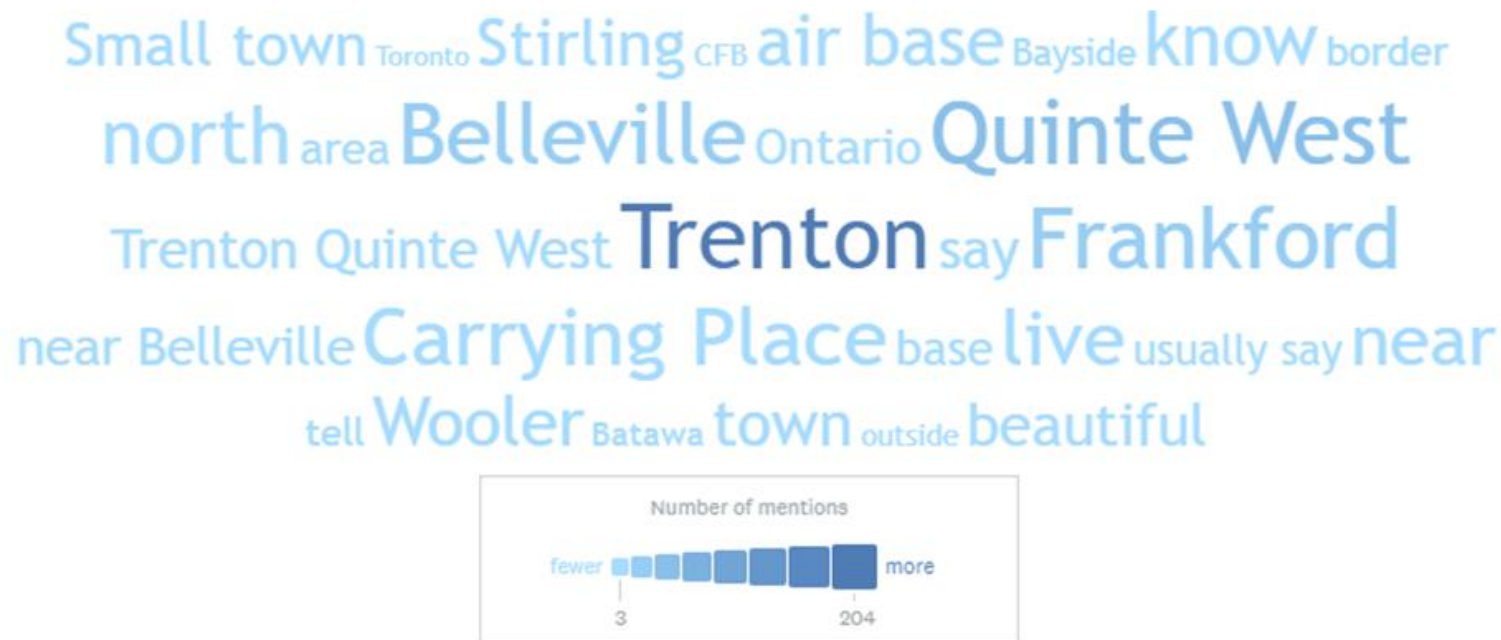


Branding and Marketing

A community's brand is integral to community pride, identity, and internal and external awareness of where the community is and what its strengths and opportunities are. In a perfect world, the legal name of the community would align perfectly with its tourism brand, as well as the feeling of belonging that residents associate with the place where they grew up. Often, however, circumstances have created disconnects that are difficult to mitigate.

Quinte West faces these challenges, as do many single-tier, amalgamated municipalities with several established urban areas and hamlets within their boundaries. Trenton, for example, no longer exists as a municipal entity, but residents and businesses naturally find it difficult to change their patterns of behaviour when acknowledging new identities – even after two decades! The public survey for this project revealed that 56% of residents continue to use Trenton when asked “where are you from?”. Only 15% answered Quinte West, and many other place names were also given (see Figure 7), demonstrating that the challenge is deep and historic, and will not be fixed overnight.

Figure 7: Quinte West resident responses to "Where are you from?" question in Resident Survey





A similar challenge exists in Virginia's Blue Ridge, where communities such as Roanoke (Figure 8) and Franklin County are still used in marketing. The tourism authority for Virginia's Blue Ridge⁴⁴ prepared a branding tool kit including phrases and descriptions to help spread the region's message. This is just one example of how a rebranding exercise could result in a whole toolbox of tactics to be used, over an extended period of time, to address the Quinte West branding issue.

The City of Quinte West must set out on a rebranding journey requiring additional resources and effort to solve the challenge. This journey will require full commitment of elected representatives and staff, and the cooperation of all departments, partner organizations, community groups, businesses, and residents, in order to stabilize the Quinte West identity and brand.

Figure 8: Virginia's Blue Ridge: Example of incorporating old placenames next to official brands



From a tourism promotional perspective, the City should continue to support the Bay of Quinte brand in partnership with the regional marketing board. Marketing and promotional tactics specific to attracting tourists and new residents are clearly within the mandate of the Bay of Quinte Marketing Board, as funded by municipal partners, with support from RTO9 Southeastern Ontario.

Tourism development efforts can continue unhindered by branding issues. By developing, for example, a corridor of attractive outdoor experiences along the Trent-Severn from Quinte West Farmers' Market to Batavia to Frankford, visitors will become aware of the specific activities within the corridor and post social media comments and positive reviews on trip planning apps. Creating Quinte West itineraries, as recommended in the report, would be very helpful to building brand awareness while highlighting the strengths of local tourism attractions. Itineraries for various seasons, holidays, tourist personas, and experience clusters are very useful for consumers, helping them to make decisions easily and plan their trips with new insights.

A final reminder: don't lose sight of the goal to develop your tourism industry, independent of your municipal rebranding journey.

⁴⁴ [Virginia's Blue Ridge Branding Kit](#)



05

STRATEGY BACKGROUND

QUINTE WEST TOURISM DEVELOPMENT STRATEGY



SOARR ANALYSIS

Overview

A SOARR Assessment is a model for reflecting on strategic planning by studying identified Strengths, Opportunities, Aspirations, Risks, and Results (SOARR). It is a forward-looking model, taking elements of what would traditionally be affiliated with an analysis of Strengths, Weaknesses, Opportunities, and Threats (SWOT). It then uses insights gained through stakeholder consultations to inform what is desired for the future and how to know when success has been achieved.

S

STRENGTHS

What can Quinte West build on to enhance the tourism sector?

- **Physical tourism assets** - Bay of Quinte, Trent-Severn Waterway, Lower Trent and Quinte conservation areas, publicly owned and accessible waterfront lands
- **Established tourism operators** - National Air Force Museum of Canada, Batawa Ski Hill, Trent Port Marina
- **Municipal support** - Historical support for the tourism sector has been consistent through funding and other supports (event coordination, Community Improvement Plan, establishment of a Municipal Accommodation Tax)
- **Regional tourism ecosystem** - Bay of Quinte Marketing Board, RTO9 South Eastern Ontario, Quinte West Chamber of Commerce
- **Location** - On Highway 401 adjacent to Prince Edward County, close to Toronto, Montreal, Ottawa

Data sources:
Quinte West | MDB Insight

O

OPPORTUNITIES

What are Quinte West's best possible future opportunities?

- **Product development** - Increase the number of major tourist attractions, e.g. Quinte Museum of Natural History
- **Operator enthusiasm** - Businesses are interested in increased engagement and training opportunities
- **Monetized outdoor experiences** - Lots of potential and demand
- **Sports / recreational tourism** - Quinte West will host the 2024 U15 Canada Soccer National Championships
- **Events & festivals** - Farm-to-table potential
- **Investments in public realm** - Trails, waterfront access, signage, recreational amenities
- **Accommodation** - address the shortage of overnight tourist accommodation quantity, quality and diversity



SOARR ANALYSIS

A

ASPIRATIONS

What does Quinte West envision the future tourism sector to look like?

- **Outdoor recreation hub** - Become known as the place where visitors go to play and explore the outdoors
- **Year-round tourism** - Increased overnight stays and daytrippers in shoulder seasons and winter
- **Water-based experiences** - Development of more water based product and experiences
- **Accommodation** - More camping and higher-end accommodation offerings
- **Awareness** - Placing Quinte West 'on the map'
- **Environment** - Ensure sustainable tourism growth and continue to protect local environment

R

RISKS

What are the potential risks that would restrict developing the tourism sector?

- **Effective Partnership Development / Coordination** - High number of regional players with conflicting interests
- **Waterfront Ownership** - Quinte West does not own many waterfront assets, limiting development potential
- **Over tourism** - Potential for high concentrations of visitors during summer which negatively effects local quality of life
- **Brand presence** - The regional tourism market is saturated with well-funded brands, meaning it could be difficult to promote a local brand
- **COVID-19 recovery** - The pandemic has affected parts of the local tourism sector

R

RESULTS

How can Quinte West know the tourism sector is succeeding?

- **Accommodations** - Improved quality, quantity and diversity of accommodation stock
- **Investments** - Increased public funding for tourism attraction and retention efforts
- **Training and events** - Supports for local operators to upskill and/or pivot offerings
- **Workforce** - Employers can find enough skilled tourism workers
- **Business viability / resilience** - Attraction of major tourism operators
- **Data** - Better access to data on visitor numbers, spending and sentiment

Data sources:
Quinte West | MDB Insight



TOURISM ASSET ANALYSIS

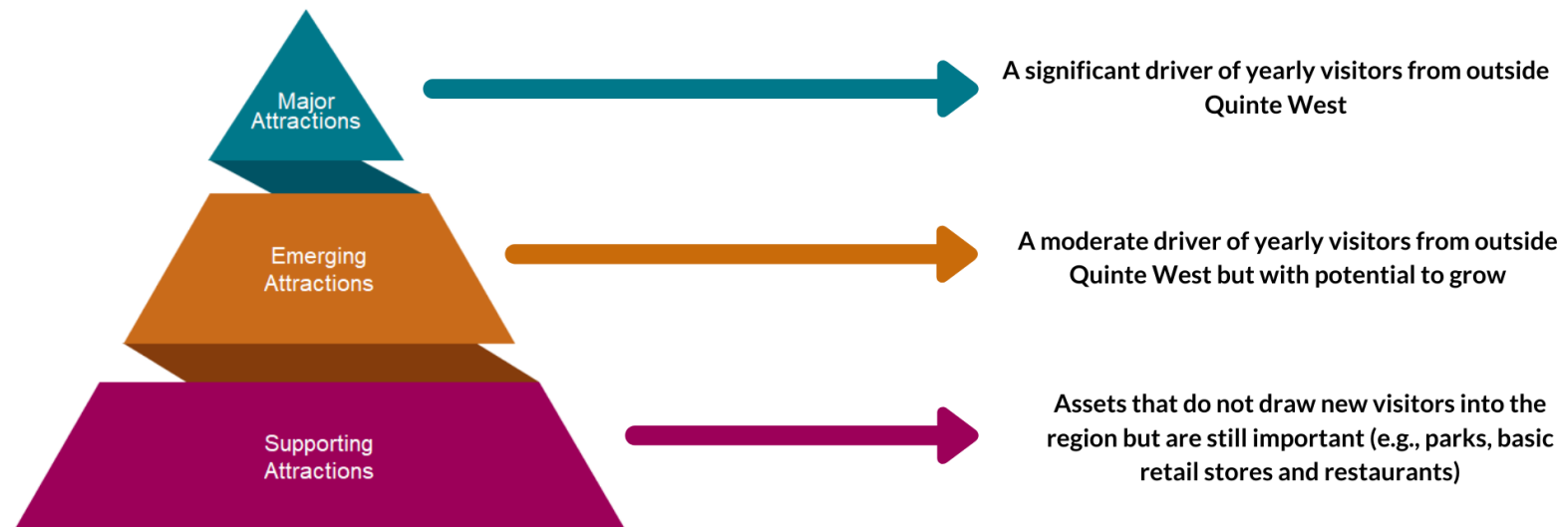
Overview

An asset analysis was also conducted to understand the level of tourism development within Quinte West and opportunities for growth.

Assets were assessed on:

- Online presence (e.g., website quality, online visibility, social media presence)
- Business strength (e.g., viability, partnership potential, ease of navigation)
- Alignment with three RTO 9 visitor personas

Tourism Asset Analysis Framework



Data sources:
RTO 9 Visitor Personas | MDB Insight



TOURISM ASSET ANALYSIS

Asset Breakdown

9

major
attractions



39

emerging
attractions



160

supporting
attractions

Assets

- National Air Force Museum of Canada
- Batawa Ski Hill & Trails
- Trent Port Marina
- Quinte Conservation Areas
- Lower Trent Conservation Areas
- Bay of Quinte (fishing & boating)
- Bay of Quinte Golf & Country Club
- Centennial Park & Facilities
- Trent-Severn Waterway

Top Emerging Assets

- Quinte West Pop Ups
- Grills Orchards
- Quinte West Farmers' Market
- Wild Card Brewing Company
- Dahlia May Flower Farm
- Old Church Theatre
- County Emporium
- Fina Vista Farms
- Tomasso's Italian Grille
- Quinte Botanical Gardens
- Trenton Rowing and Paddling Club
- Trenton Town Hall 1861
- Montrose Inn Boutique Bed & Breakfast & Tea Room

Assets include all other parks and recreational spaces, accommodations, other restaurants and retail outlets, and seasonal operators.

Note: A complete asset list can be found in the technical report.

Tourism Development Stage



Developing

Quinte West's tourism industry is currently in its development stage. An analysis of tourism assets revealed a solid base of emerging attractions with the potential to develop into a thriving tourism sector.

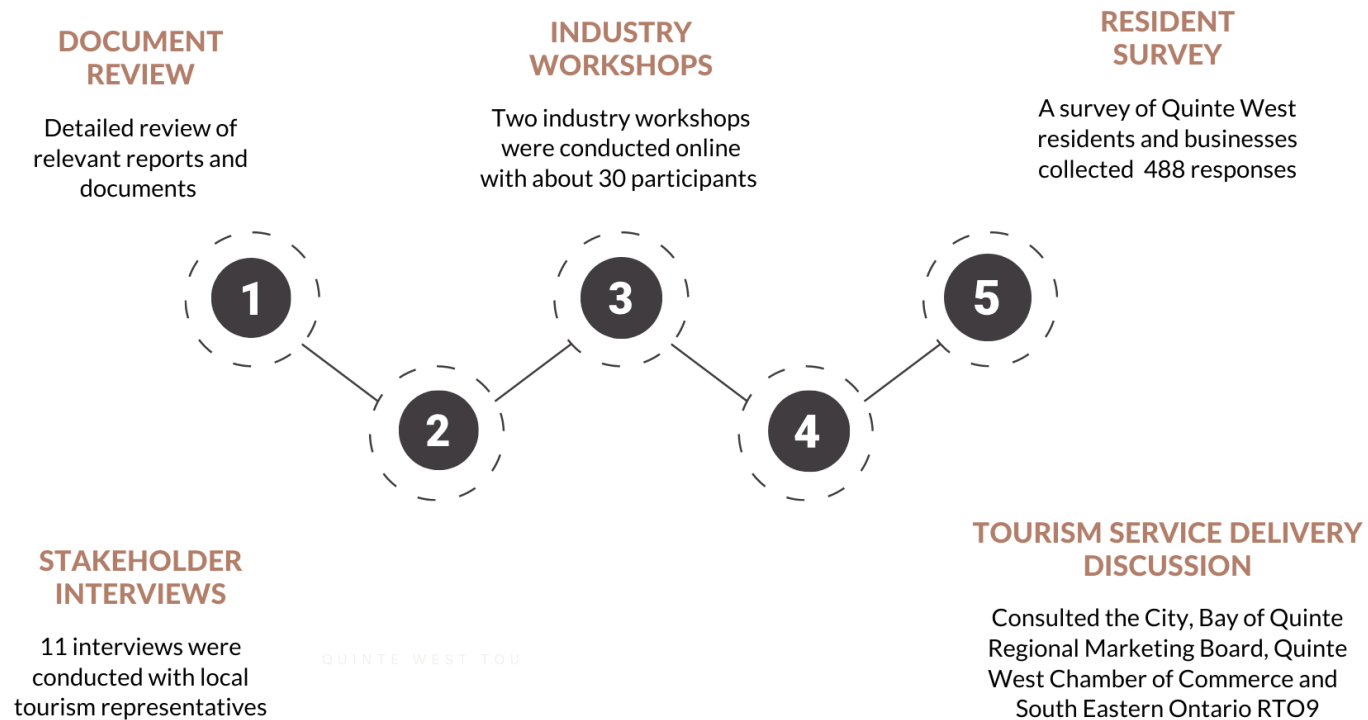
Data sources:
Internal Quinte West Tourism Asset List | Stakeholder Consultation | MDB Insight



THEMES FROM ENGAGEMENT

Overview

In preparing the strategy, several different forms of engagement were conducted to ensure buy-in from stakeholder groups and ensure that Quinte West is not moving away from the expectations and needs of those interested in the long-term success of the tourism industry. This section provides an overview of the key groups consulted and the overarching themes from engagement. Detailed analysis of each consultation can be found in the technical report.





THEMES FROM ENGAGEMENT

1

Residents are supportive of tourism

- 94% of survey respondents agreed that "tourism is good for the City"
- 94% of survey respondents felt that "tourism makes a valuable contribution to the local economy"
- 89% of survey respondents felt "tourism is just as important as other industries"

2

High demand for outdoor-based experiences

- Tourism operators indicated growing consumer demand for consumable products centered around natural assets and experiential tourism
- Quinte West's slogan "A Natural Attraction" is strong but there's room to develop and market local attractions to better meet this slogan

3

Waterfront and river development

- There was consensus that increased waterfront and river development should be a priority
- Improved waterfront trails, seasonal tourism products, improved boating and fishing opportunities
- Acknowledgment that the City does not own waterfront property and is limited in development capabilities

4

COVID-19 impacts and recovery

- The pandemic has disproportionately negatively affected the tourism sector in general
- Operators have been overall happy with municipal supports but want a clear recovery strategy put in place
- Incentives and grants specific to the tourism sector could help kickstart the sector

QUINTE WEST TOURISM



THEMES FROM ENGAGEMENT

5

Improved regional collaboration

- Operators indicated that it was difficult to navigate regional partnerships
- Small-P political and bureaucratic issues sometimes prevent progress
- Opportunity for Quinte West to receive more marketing support and brand exposure from regional entities

7

Leverage location to overcome brand identity

- The Quinte West brand was identified as creating some confusion with tourists
- When asked "where are you from?" 56% of local survey respondents said Trenton
- Overcoming brand challenges will take time
- Geographic proximity to Prince Edward County could be better leveraged to draw tourists in, with or without the neighbour's cooperation

6

Operator grants and training

- Local operators felt that Quinte West could provide more grants and incentives to develop new or improve existing tourism products
- Digital marketing training and increased networking opportunities were also highlighted

8

Celebrating business success

- Stakeholders felt that downtown revitalization efforts have improved the attractiveness of the sector
- Focus on improving linkages between assets (signs, trails, visitor viewing spots)
- Agri-tourism products should be promoted alongside water-based experiences



TOURISM BENCHMARKING REVIEW

Overview

A tourism benchmarking review was conducted to analyze tourism strategies in three comparable communities in Ontario, and to determine what Quinte West can learn from their respective approaches. A detailed review of each community can be found in the technical report with high-level insights detailed below.

Benchmarked Communities



Insights

Product Development

1

When improving a tourism destination, focus on product development first as this forms the foundation for marketing efforts. The comparator communities were effective at prioritizing operator training supports including improving the online presence of tourism businesses. Quinte West should also focus on supporting tourism-readiness initiatives (e.g., training and industry engagement) so operators have the skills to expand confidently, along with formalized opportunities to network.

Data sources:

Haldimand County Tourism | Visit Middlesex County | Orillia & Lake County Tourism | MDB Insight



TOURISM BENCHMARKING REVIEW

Insights continued

2

Strategic Investment

The comparator communities have consistently prioritized tourism investment to ensure the sector grows sustainably. For example, Orillia has developed a sophisticated tourism brand and attracted core tourism operators that drive sector growth. A portion of their newly established Municipal Accommodation Tax (MAT) has been set aside as a tourism reserve fund. The remaining portion is invested yearly into improving local products and marketing activities. Haldimand County has a suite of financial incentives under their Community Improvement Plan (CIP) to support operators in developing or expanding products.

3

Waterfront Access

Water assets are important parts of Orillia and Haldimand County's tourism identity and long-term success. Orillia identified the importance of increasing access and worked at improving resident and visitor access, acquiring an underutilized parcel of land with the vision of plaza development. Haldimand County prioritized improving waterfront access through increased offerings and activations along the Grand River. Quinte West should consider a strategic approach towards long-term waterfront development, including all lakefront, rivers, and canals.

4

Collaboration

Effective regional collaboration was identified as an important step in developing a successful tourism destination. For example, Middlesex County is in close proximity to London and collaborates with the London Economic Development Corporation (LEDC) on investment and attraction initiatives along with other partners. Middlesex County recognizes that collaboration spurs creativity, improves productivity, and increases visitor satisfaction. Overall, collaboration should be regarded as an ongoing activity, rather than having a fixed end date, to unlock a region's full potential.

Data sources:

Haldimand County Tourism | Visit Middlesex County | Orillia & Lake County Tourism | MDB Insight



ECONOMIC IMPACT ASSESSMENT

Overview

This section assesses the importance of tourism to the economy of Quinte West. The total impact of tourism on Quinte West – including all direct, indirect and induced impacts – was equal to \$15.2 million of GDP and 270 jobs in 2016. Tourism accounts for 0.8% of Quinte West's total GDP and 1.6% of all jobs located in the City.

	Direct Impact	Indirect Impact	Induced Impact	Total Impact
OUTPUT \$ MILLIONS	\$18.4	\$9.3	\$9.3	\$35.6
GDP \$ MILLIONS	\$10.6	\$2.6	\$2.0	\$15.2
LABOUR INCOME \$ MILLIONS	\$8.3	\$2.6	\$0.9	\$10.7
JOBS	223	27	20	270

Data sources:

Statistics Canada Economic Impact Multipliers and metroeconomix 2016

Note: A detailed version of the Economic Impact Assessment can be found in the Technical Report



TOURISM GUIDING PRINCIPLES

Overview

The Tourism Guiding Principles were developed by the Future of Tourism Coalition, an alliance of six non-governmental organizations: Centre for Responsible Travel, Destination Stewardship Centre, Green Destinations, Sustainable Travel International, Tourism Cares, and The Travel Foundation. More than 35 government agencies and destination marketing organizations, and 300+ businesses, associations, and consulting firms around the world have signed onto the Tourism Guiding Principles.

SEE THE WHOLE PICTURE

Recognize that most tourism by its nature involves the destination as a whole, not only industry businesses, but also its ecosystems, natural resources, cultural assets and traditions, communities, aesthetics, and built infrastructure.

QUALITY OVER QUANTITY

Manage tourism development based on quality of visitation, not quantity of visitors, so as to enhance the travel experience while sustaining the character of the destination and benefiting local communities.

USE SUSTAINABILITY STANDARDS

Respect the publicly available, internationally approved minimum criteria for sustainable tourism practices maintained by the Global Sustainable Tourism Council (GSTC) for both industry and destinations.

DEMAND FAIR INCOME DISTRIBUTION

Set policies that counter unequal tourism benefits within destination communities that maximize retention of tourism revenues within those communities.

COLLABORATIVE DESTINATION MANAGEMENT

Seek to develop all tourism through a collaborative management structure with equal participation by government, the private sector and civil society organizations that represent diversity in communities.

REDUCE TOURISM'S BURDEN

Account for all tourism costs in terms of local tax burdens, environmental and social impacts, and objectively verifiable disruption. Ensure investments are linked to optimizing net-positive impacts for communities and the environment.



TOURISM GUIDING PRINCIPLES

SEE THE WHOLE PICTURE

Recognize that most tourism by its nature involves the destination as a whole, not only industry businesses, but also its ecosystems, natural resources, cultural assets and traditions, communities, aesthetics, and built infrastructure.

REDEFINE ECONOMIC SUCCESS

Rather than raw contribution to growth in GDP, favor metrics that specify destination benefits such as small business development, distribution of incomes, and enhancement of sustainable local supply chains.

MITIGATE CLIMATE IMPACTS

Strive to follow accepted scientific consensus on needed reductions in greenhouse gas emissions. Invest in green infrastructure and a fast reduction in transport emissions involved in tourism - air, sea, and ground.

CLOSE THE LOOP ON RESOURCES

When post-pandemic safety allows, turn away from the use of disposable plastics by tourism businesses, and transition to circular resource use.

CONTAIN TOURISM'S LAND USE

Limit high-occupancy resort tourism to concentrated areas. Discourage resort sprawl from taking over coasts, islands, and mountain areas, so as to retain geographical character, a diverse economy, local access, and critical ecosystems.

DIVERSIFY SOURCE MARKETS

In addition to international visitation, encourage robust domestic tourism, which may be more resilient in the face of crises and raise citizens' perceived value of their own natural and cultural heritage.

PROTECT SENSE OF PLACE

Encourage tourism policies and business practices that protect and benefit natural, scenic, and cultural assets. Retain and enhance destination identity and distinctiveness. Diversity of place is the reason for travel.



5.6 Tourism Sector Trends

A full review of tourism sector trends can be found in the technical report, including an overview of Canadian, provincial, and regional inbound travel situation, and any future predictions that may have been articulated by tourism authorities. Here are the highlights:

National: Canada's tourism industry, pre-Covid, was a \$105-billion industry, supporting 748,000 jobs directly, and 1.9 million jobs (or 1 in 10 jobs) in tourism-dependent industries. Tourism worldwide took an unprecedented hit in 2020, and recovery outlooks are not optimistic. Last year, Canada had lost up to 440,000 jobs in the visitor economy, 59% of all jobs in that sector. Hotel revenues in resorts across Canada sustained a revenue contraction of 61% in 2020.

Provincial: The economic impact of Ontario's tourism industry is considerable. In 2018, Ontario welcomed over 144 million visitors, contributing approximately \$33 billion to the provincial GDP. Ontario is also home to 200,000 tourism-related businesses, which employ 400,000 people in a range of areas, including food and beverage, recreation and entertainment, transportation, accommodation, and travel services. During the pandemic, the number of active tourism businesses in Ontario declined by 13.7% between January and October 2020, the only region to fall below the sector average of 10.7%.

Regional: For Quinte West's Regional Tourism Organization, South Eastern Ontario, visitors spent \$900.8 million in 2017, with \$74.9 million from overseas travellers. Nearby, Kawartha's Northumberland, recorded \$626.6 million in visitor spending in 2017, with \$33.4 million from overseas travellers. Attracted by fresh air and open spaces, Canadians took to the road to explore parks and resort areas starting from July of 2020, dampening the impact of COVID-19 on accommodation providers servicing these regions. According to the 2020 CBRE National Market Report, the Bay of Quinte region experienced a summer of strong visitation, especially from the Greater Toronto Area and Quebec. The region's hotel occupancy percentage was in the top 3 in Canada and finished last year with the lowest percentage loss in all of Canada (9%) in a year when the average occupancy percentage decrease in the country was over 31%.

Pent-up demand: In 2019, Canadians spent \$28.2 billion on international leisure travel (excluding air). In March 2021, Destination Canada estimated that a shift in spending from international to domestic travel this year can help sustain jobs and rebuild billions of dollars in lost revenues. If Canadians re-allocated two-thirds of international tourism dollars to domestic tourism, it would replace the estimated \$19.4 billion shortfall in 2020 international revenues and sustain over 150,000 jobs. CIBC reported in November 2020 that Canadian households are holding on to more than \$90 billion in excess cash, which is equal to four per cent of consumer spending. Quinte West has incredible potential to offer to future tourists especially around outdoor attractions, biking, and boating activities, to name a few. Once travel restrictions are lifted and Canadians feel safe to travel, this area could greatly benefit from pent-up tourism demand from large urban centres such as Montreal and Toronto.

For further details on this section and others, consult the separate Technical Report.



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