

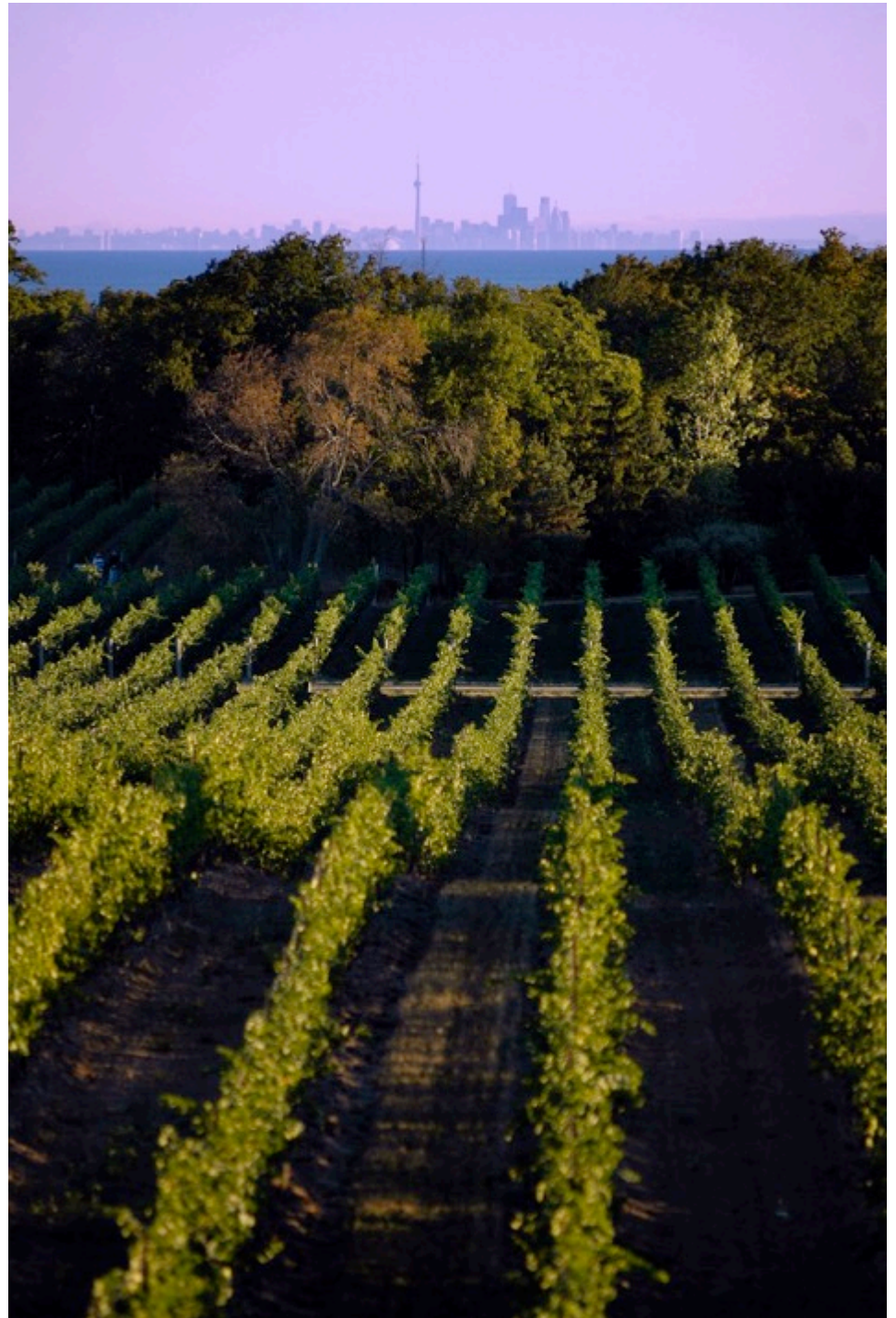
# *LINCOLN DESTINATION TOURISM STRATEGY AND ACTION PLAN 2020 – 2025*

Pathways to a Prosperous  
Tourism Sector



the Tourism Company

*June 2020*



## *Acknowledgements*

Steering Committee:

Thanks to the following member of the Steering Committee for their guidance and input during this project:

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## Executive Summary

The tourism planning work was completed as part of a larger assignment, the *Urban Gateways Design, Wayfinding Signage Design and Program, and Tourism Strategy and Action Plan* led by Wavefront Planning and Design. The Tourism Company has been responsible for preparing this Tourism Strategy and 5-year Action Plan.

*Lincoln's Pathway to Prosperity*, the Town's economic development strategy for 2019-2023 identified tourism as one of the four key pillars for the Lincoln economic future. Tourism and the related value-added agricultural businesses in Lincoln are a major economic driver.

The Town of Lincoln Economic Development Strategy outlined two strategic tourism objectives:

1. To develop a Lincoln centred tourism strategy and action plan to provide needed infrastructure, expand capacity, increase visitor accommodations, and create memorable destinations, value and services to attract more visitors to Lincoln.
2. To initiate action on local tourism-related needs that lend themselves to immediate action (i.e. seeking investment for accommodation and signature destination experiences, and wayfinding signage).

### Need for a Tourism Strategy

A comprehensive Lincoln-centred tourism strategy is needed for the following key reasons:

- To clearly define the role of the Town in the tourism sector;
- To strengthen and grow the local tourism economy, and create and sustain more jobs;
- To evaluate the strengths, weaknesses and opportunities;
- To attract new investment; and
- To prepare a 5 -year action plan to guide the Town's efforts.

## Existing Tourism Context

The Town of Lincoln is at the western edge of the Niagara Region and is thus on the route to several well-established destinations – Niagara Falls which has strong international awareness as a destination, as well as Niagara-on-the-Lake. The bulk of the visitation to the Niagara Region is comprised of visitors travelling to Niagara Falls.

The Town of Lincoln is already capitalizing on the pass-through tourism markets with travellers going to and from other regions in Niagara. There is also a burgeoning local culinary and craft beverage market from both directions – from the Golden Horseshoe and upstate New York. Many of the wineries are successfully catering to weddings and small corporate events.

The Twenty Valley Tourism Association (TVTA) has been the area's Destination Marketing Organization since 2001. The TVTA focus has been on both event execution and marketing the destination, with tactics that include a website, Visitor Guide and map, and more recently media relations.

The figure to the right presents a summary of some of the most critical strengths, weaknesses, opportunities and threats for Lincoln as a destination.

Critical SWOT's	
<b>Strengths</b> <ul style="list-style-type: none"> <li>• Abundance of market ready individual experiences</li> <li>• Diversity of boutique wineries and beverage producers</li> <li>• Rich history evident in buildings, landscapes, archaeology, and intangibles</li> <li>• Proximity to domestic and international markets (i.e. 6 million in GTA, 20 million visitors)</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>• Accommodation capacity</li> <li>• Transportation within the Town and area and to Lincoln</li> <li>• Some products and experiences are not market ready (i.e. cycle tourism)</li> <li>• Not pulled together as a destination</li> </ul>
<b>Opportunities</b> <ul style="list-style-type: none"> <li>• Lake Ontario shoreline and harbours</li> <li>• Niagara Escarpment</li> <li>• The Greenbelt</li> <li>• Adaptive reuse of heritage buildings</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>• Mass (volume) tourism from QEW and Niagara Falls</li> <li>• Urbanization</li> <li>• Proliferation of competitive beverage destinations both domestically and internationally</li> </ul>



## Competitive Advantages

The Lincoln centred destination should encompass adjacent rural/agricultural areas in neighbouring municipalities when strategically appropriate and be considered from a visitor's lens. Visitors focus on destinations where they can enjoy specific experiences rather than on political boundaries.

The destination is defined by its rural and agrarian landscapes with the Niagara Escarpment, Benches, and lakeshore providing for diversity of landscapes and unique growing conditions. The regions key competitive advantages are as follows:

1. Proximity to markets – GTA /Golden Horseshoe and upstate NY;
2. Agrarian rural landscape;
3. Topographic diversity with escarpment, benches, creeks, harbours, and the Lake Ontario shore;
4. Quality and quantity of artisanal and boutique beverage makers offering creative experiences – wineries, brewery, distillers, meadery and cider houses;
5. Unique cultural heritage;
6. Authenticity and scale; and
7. Tender fruit growing.

The real unique differentiating features from other parts of Niagara and other destinations in Ontario are the benches (physiographically, climatically and aesthetically).

This destination lends itself to exploration, slow travel, and serendipitous discovery.

Practices from four established and successful tourism destinations that share characteristics with Lincoln (including a rural economy dominated by agriculture and/or wine growing, home to a number of settlement communities and accessible from nearby major urban centres) were reviewed to identify benchmarks and best practices. Destinations reviewed included:

- Prince Edward County, Ontario
- Napa Valley, California
- Hawke's Bay, New Zealand
- Thompson Okanagan Region, BC



Elements of a good tourism strategy are listed below:

**Setting the Stage:**

- Accommodation attraction
- Urban design
- Transportation opportunities
- Attracting strategic investment

**Creating Reasons to Visit:**

- Tourism event development and calendar
- Stimulate new attractions
- Development of compelling itineraries/experiences

**Branding:**

- Determine sense of place, imagery
- Develop guidelines and control of brand use
- Position in target markets

**Marketing:**

- Research and analysis
- Traditional and digital platforms
- Maps, brochures
- Media relations

**Visitor Services:**

- Sense of arrival
- Gateway and wayfinding signage
- Information for all steps of the visitor journey (before, during and after)

## **7 Guiding Principles for the Lincoln Centered Destination**

1. Maintain character of place
2. Collaboration
3. Soft boundaries
4. Yield over numbers
5. Accountability
6. Grow experiential tourism
7. Sustainable tourism

### **Vision**

The Lincoln-centered destination offers visitors unique tourism experiences built around an award-winning artisanal beverage sector in a spectacular natural setting, targeted at high yield, small group and independent travelers sensitive to preserving the unique character of place.

Sustainable tourism, together with ecotourism/responsible tourism will form the central spine running through the Lincoln tourism master plan.

### **The Target Markets**

Based on an assessment of existing and potential market opportunities the key target markets are identified as follows:

- Artisanal/craft beverage tourists
- Culinary tourists
- Soft adventure travellers (hiking, paddling, cycling, bird watching)
- Bicycle touring groups and individuals
- Wellness tourists

- Festival and event attendees
- Agritourists

### Town's Role in Tourism

One of the key aspects of this project was to determine the Town's role in the evolution of the tourism sector. For approximately 20 years, the Town has outsourced tourism development and management to the Twenty Valley Tourism Association. After careful consideration and consultation with the tourism industry, the recommendation is that the Town play a larger role in managing the destination, while allowing a public-private partnership between the Town (and other public sector stakeholders) and private industry stakeholders to market the Lincoln centred destination.

The following chart illustrates the initial destination management and marketing (DMMO) structure with the Town of Lincoln lead.



## **Strategic Approach & Roles and Responsibilities**

To ensure a healthy tourism industry that supports multi-seasonal attractions and experiences, the Town should develop and adopt a framework for evaluating tourism projects, investment and infrastructure initiatives to ensure alignment with the Tourism Strategy.

The Town has a key role to play in moving the industry forward and must take the lead in developing and implementing the Tourism Strategy, in partnership with private sector stakeholders, through a Tourism Strategy Implementation Team.

## **Destination Management and Marketing Organization (DMMO)**

- The DMMO structure for the Lincoln-centered destination should focus equally on management as on marketing, with a broadened stakeholder base corresponding with the destination definition.
- Town of Lincoln (ToL) to take the lead in establishing a private-public partnership model for the DMMO, to be advised, assisted by a Tourism Strategy Implementation Team (TSIT).
- The TSIT to include 5-8 industry stakeholders, 2 Town staff, 1 from the TVTA and 1 from MHSTCI (Ministry of Heritage, Sport, Tourism and Culture Industries).

## **Implementing the Strategy**

1. A dedicated, Full-Time Equivalent (FTE) Town tourism staff position is needed to play a lead facilitation role in implementation of the Strategy and Implementation Team.
2. Reconstruct the Tourism Marketing Organization (create a hybrid stakeholder/membership model vs. the old membership model).

3. TSIT to prepare an RFP for a branding specialist to develop a new brand for the destination.
4. TSIT to prepare an RFP for a marketing/communications specialist to develop a 3-year marketing plan.
5. Tourism Marketing Association to move towards a digital visitor services model.
6. ToL/EcDev to develop a policy for supporting tourism events based on a strategic event calendar targeting events with clear tourism impacts/benefits.
  - a. Partner with local academic institutions to develop a robust accountability research program with a well-established baseline research profile.
7. Tourism Marketing Organization to develop a program for market readiness and experience development training and programming for local operators.
8. ToL/EcDec to develop a proactive tourism investment attraction program, initially targeting appropriate accommodation investments to fill the gap.

### **Town of Lincoln To Address Infrastructure Priorities**

1. Develop an integrated (multi-modal) trail system throughout the Town and investigate and promote alternative transportation, as detailed in the recently adopted ToL Transportation Master Plan. Alignment between these two Strategies is key.
2. Encourage tourism friendly downtown development through creation of pedestrian friendly areas with adaptive reuse of historic buildings and concentration of tourism retail, local food restaurants, public art and enhanced aesthetic appeal.
  - a. Expanding the BIA model to Vineland and further work with the Jordan Merchants' Association will help lay the groundwork for investment.
  - b. Amplification of CIP programs geared towards building improvements and façade upgrades will also assist in making downtowns visitor friendly.

## **Proposed Year One Budget**

For year one, in implementing the Tourism Strategy, the following budget is proposed for the Town of Lincoln in the leadership role. The total budget is \$215,000 representing \$115,000 in new spending for 2020, broken down as follows:

- Destination branding - \$25,000;
- Develop 3 year marketing plan - \$20,000;
- Marketing and activities - \$75,000 (partnered contribution);
- Product and experience development - \$25,000;
- Accountability research - \$5,000 (contribution);
- FTE Tourism Position - \$65,000 (beginning April 1, 2020).



## 1. Introduction

### 1.1 Tourism Strategy/Action Plan Objectives

The tourism planning work was completed as part of a larger assignment, the *Urban Gateways Design, Wayfinding Signage Design and Program, and Tourism Strategy and Action Plan* an assignment contracted by the Town for Lincoln and led by Wavefront Planning and Design. The key deliverables for this assignment are:

1. Prepare a Tourism Strategy – a 5-year Action Plan to support the development of tourism in Lincoln.
2. Prepare a Gateways and Wayfinding Strategy – for new and improved identity and directional signs.

*Lincoln's Pathway to Prosperity*, the Town's economic development strategy for 2019-2023 identified tourism as one of the four key pillars for the Lincoln economic future. The economic strategy identified the need to develop a comprehensive, focussed Lincoln-centred tourism strategy and action plan, and to undertake a comprehensive wayfinding signage program based on branding and identity recommendations arising from the tourism strategy.

A comprehensive Lincoln-centred tourism strategy is needed for the following key reasons:

- To clearly define the role of the Town in the tourism sector;
- To strengthen and grow the local tourism economy, and create and sustain more jobs;
- To evaluate the strengths, weaknesses and opportunities;
- To attract new investment; and
- To prepare a 5 -year action plan.

## 1.2 Approach & Methodology

The approach for completing a tourism strategy for Lincoln followed the standard tourism planning steps as outlined below:

Step 1 – Situation Analysis – to familiarize team members with the current state of tourism in Lincoln and the Niagara Peninsula.

Step 2 – Supply and Demand Analysis - to review existing inventories of tourism products, identify potential new products/experiences and related resources and thoroughly assess the market demand, both existing and potential, for the range of experiences (existing and potential).

Step 3 - Evaluation of Needs, Opportunities and Strategic Alternatives - Based on the analysis in Step 2 begin to prepare an outline of strategic alternatives for destination development, management and marketing.

Step 4 – Tourism Strategy - to prepare the long-term vision and strategy for tourism development.

Step 5 - 5-Year Action Plan – to develop a short-term action plan outlining the steps to implement the strategy.

<sup>the</sup> Tourism Company brought to this assignment some working familiarity with the Niagara Region tourism industry having been involved in the following assignments:

- E.D. Smith & Sons Industrial Tourism Attraction Feasibility Assessment, 1985;
- Joint Outdoor Tourism Marketing Strategy for the Five Golden Horseshoe Conservation Authorities, 1995;
- Niagara Falls Tourism Area Development Strategy (in association with Berridge Lewinburg, Dark and Gabor, 1998;
- Niagara Falls Heritage Master Plan (in association with Bray Heritage), 2007;
- Old Town and Dock Area (Niagara-on-the-Lake); Vision and Secondary Plan (in association with Urban Strategies Inc, 2009;
- Town of Pelham Heritage Master Plan (in association with Bray Heritage), 2012

## 2. Supply Analysis

### 2.1 Potential Tourism Opportunities

All existing tourism facilities, attractions and infrastructure have been mapped by Wavefront Planning and Design, and the detailed maps are presented in the *Situational and Character Analysis* report. The inventory and mapping were completed by categorizing the tourism assets into the following categories:

- Accommodation;
- Wineries/beverages;
- Nature/outdoors;
- Arts/culture;
- Agritourism and culinary;
- Waterfront;
- Sport tourism; and
- Attractions and events.

The following sub-sections present the consultants assessment of the current status of development of market ready products and services within each category.

#### 2.1.1 Accommodations

There is an estimated total of 245 commercial accommodation rooms available in the Town of Lincoln alone, with the largest accommodation categories being B&B's and AirBnb's. There is a critical gap in appropriate commercial accommodations with larger room counts such as Inns, boutique hotels, motels and hotels. A large proportion of the Town and surrounding areas fall within the Greenbelt, a broad band of protected land that includes and builds on the ecological protection of the Niagara Escarpment. The Greenbelt provides the policies to protect against the loss and fragmentation of the agricultural and natural land base and cultural heritage features/resources, while allowing for appropriate responsible tourism initiatives including B&B's and other agritourism uses. In order to help fill the accommodation

gap there is potential within the Greenbelt to develop more innovative and creative character accommodations, variations on small scale B&B's, with farm stays and possibly historic guesthouses. These establishments might not be a primary business but can help to provide supplementary income or seasonal income to locals. There is also potential within the town and village boundaries, and outside the Greenbelt boundaries, to develop larger scale commercial accommodations like boutique hotels and rural resorts. The boost that Prince Edward County has received from new commercial accommodations (Inns and boutique hotels) like the highly acclaimed Drake Devonshire and the Fronterra Farm/Camp and Brewery are evidence of the positive tourism impact from unique character accommodation establishments. If the Town of Lincoln wants to increase the economic impact and benefits from tourism an expanded accommodation base will be a critical gap to fill.

#### 2.1.2 Wineries/Beverages

The Town of Lincoln and surrounding rural/agricultural area is blessed with unique physiography and associated micro-climates and soils providing for 6 different viticultural sub-appellations, including three benches. This area is one the most important tender fruit growing areas in Canada. As a result, Lincoln has the largest concentration of high quality, award winning beverage producers in the province. The diversity of beverage production in the Lincoln area now includes wineries, breweries, a meadery, cider houses, and distillers. Many of the artisanal producers have developed visitor programs and services ranging from tasting rooms to restaurants to special event facilities. Those smaller operations that have not developed these types of facilities on their own would benefit from venues that provide opportunities for collaborative tasting and retail sales.



### 2.1.3 Nature/Outdoors

There are a number of Conservation Areas in Lincoln, the most prominent of which is Ball's Falls. With the Niagara Escarpment running through the Town, the rivers and creeks and valleys that flow down from the escarpment, and several harbours as well as the Lake Ontario shoreline there is a lot of potential for further development of the nature/outdoors tourism products and experiences. One of the unique aspects of this region are the outstanding views offered along the escarpment towards Lake Ontario.

### 2.1.4 Arts/Culture

There are a few galleries and artist studios in Lincoln and several heritage attractions like the Museum, and there is a vast wealth of stories not being told. There are likely a lot more artists, musicians and creative types not engaged in the tourism sector, but that would potentially have an interest if they knew how. There is also a significant opportunity for Indigenous residents in Lincoln or surrounding areas to creatively tell the Indigenous stories and share their culture in an appealing way for visitors. There are also many historic buildings (designated and undesignated) that could provide potential for adaptive tourism uses.

### 2.1.5 Agritourism and Culinary

Agriculture is one of the economic pillars of Lincoln and agriculture is an important part of the settler history in this area. In addition to viticulture Lincoln is strong in tender tree fruits and berries and dominates greenhouse floral production in Niagara and Canada. In addition, Lincoln has a number of educational and research institutions that provide competitive advantage in the agricultural sector with Niagara College (specialized training and demonstration projects), Vineland Research and Innovation Centre (horticultural research) and Brock University (Oenology and Viticulture). Lincoln is already known for the farm markets and direct from farm sales but there is tremendous opportunity to further agritourism products and experiences. There is a substantial local culinary sector in place but



requiring more exposure and a small but growing organic and/or regenerative local culinary scene. There is ample opportunity in the area to further develop a broader range of agritourism businesses including working farm experiences, culinary schools, agricultural edutainment facilities, farm food experiences, and arts and artisan gallery and retail facilities.

#### 2.1.6 Waterfront

The Lake Ontario waterfront is not very accessible in Lincoln, with the main access areas provided by Charles Daley Park and the Beacon Hotel and Marina. The big hurdle to overcome in better capitalizing on the shoreline is the fact that most of the land along the shoreline is in private hands, and the narrow depth of land available in some parts on the north side of the North Service Road and embankments down to the lake. Jordan Harbour is an underutilized tourism asset. Any opportunities to provide access to the Lake and/or to the harbours would present potential tourism opportunity.

#### 2.1.7 Sport Tourism

There used to be a Niagara Sport Commission (funded by Trillium) with a mandate to help develop and promote regional sport tourism, but that organization has disappeared. The Centre for Sport Capacity at Brock has recently presented to Regional Council on the sport tourism opportunity for the region, an encouraging sign there is renewed interest and capacity to help develop/promote regional sport tourism.

The Town of Lincoln has just completed a Parks, Recreation and Culture Master Plan. There is an opportunity to leverage the Town's sport facilities and venues through a focussed sport tourism effort, although this is felt to be a lower priority tourism opportunity until there is greater accommodation capacity to fully take advantage of sport tourism economic benefit potential.

The most immediate opportunity will be through Lincoln's participation in regional bids and opportunities as evidenced by the recent success as a co-applicant for a Provincial Softball Championship tournament.

### 2.1.8 Attractions and Events

The Twenty Valley Tourism Association (TVTA) has three signature events that draw visitors to the region: Get Fresh in the Valley; Winter Wine Fest; and Wrapped Up in the Valley. A group of vineyards in the west end of Lincoln have established two more strong tourism events (Graze the Bench and Love the Bench) and Ball's Falls Conservation Area hosts an annual Thanksgiving Festival. The Downtown Beamsville Business Improvement Association (BIA) hosts a number of community-focused events such as Lincoln ReRooted. There is potential for a more robust special tourism events calendar.

There are several golf courses in Lincoln and only a couple of fabricated attractions including the Marina in behind the Beacon Harbourside as well as the inflatable water park, Pirate Ship Cove.

## 2.2 Visitor Information Services

The term *Visitor Information Services* (VIS) applies to the range of critical information-based services offered by a destination for the benefit of their target markets and visitors. VIS can increase a prospective visitor's awareness of the destination and assist in planning and booking the destination. VIS can play a role in the visitor staying longer or spending more, enhancing their experience while in the destination, encouraging dispersal in the destination, and/or encouraging them to return at a future date.

The main components for controlled, coordinated, and consistent Visitor Information Services in the Lincoln area will include:

- Strategically located tourist information centres;
- Interpretive centres;
- Coordinated wayfinding tourism signage that provide clear directions to connect visitors with the culture and natural heritage of the region;
- Tourism maps;
- Mobile tourism apps for the region (such as mountain bike and hiking trail apps, route/attraction apps to identify congested sites, routes to disperse visitor flows); and



- Front line staff hospitality training and familiarization training (so they know the regions tourism resources/assets).

In the Niagara Region there are a number of Ontario Visitor Information Centres at strategic locations and closest to Lincoln there is the Niagara Gateway Information Centre in Grimsby. Within the Town boundaries there is also the Ball's Falls Centre for Conservation, an interpretive and information centre.





### 3. Demand Analysis

#### 3.1 The Tourism Context

The Regional Municipality of Niagara commissioned research on visitation to the Niagara Region (RTO2) in 2017, the most recently available statistics from Statistic Canada.

- 12.95 million visitors to Niagara in 2017;
- 4.9 million overnight visitors;
- Overnight visitors on average spent \$347 while day visitors spent on average \$86
- 66% of overnight visitors came from Canada – Ontario is the largest source market by far;
- 25% of visitors came from the US, while 8% came from overseas; and
- 65% of visitors came for pleasure purposes while 24% came to visit friends and relatives.

*[NOTE – the Ministry of Tourism will not use the US data from Statistics Canada due to small sample size – this same data source has been used for these regional statistics, so the US data needs to be viewed with caution]*

The average length of stay in the Niagara Region is short (calculated at 2.5 days in the Niagara Region Premier Ranked Assessment). This is likely skewed lower by the large day visit numbers to Niagara Falls.

Niagara Falls, New York (Niagara County) generated US\$708 million in 2017, compared to \$2.4 billion in the Niagara region on the Canadian side.

### 3.2 Existing Tourism Visitation to Lincoln

There are no compiled statistics for tourism visitation to the Town of Lincoln other than what individual operators might collect. There is no available accountability research on tourism events held in Lincoln other than total attendance estimates.

The Town of Lincoln is at the western edge of the Niagara Region and is thus on the route to several well-established destinations – Niagara Falls which has strong international awareness as a destination, as well as Niagara-on-the-Lake. The bulk of the visitation to the Niagara Region is visitors travelling to Niagara Falls. According to the Executive Director for the Niagara Tourism Partnership, Niagara-on-the-Lake attracts an estimated 3-3.5 million visitors to the main wineries and about 4.5-5 million visitors in total. The Niagara-on-the-Lake destination has substantially more commercial accommodations than the Town of Lincoln with approximately 1,000 rooms in B&B's and another 1,000 in AirBnb's in addition to a large pool of hotel and Inns.

Niagara-on-the-Lake is a nationally recognized tourism destination not only because of its historic significance, rich heritage and as the home of the one-of-a-kind Shaw Festival, but because of its strong quality of place and the authentic and vibrant experience that it supports. Its location in what many perceive as the heart of Niagara's wine country further enhances its draw for residents and visitors alike. The visitor experience is clearly distinct from Niagara Falls, Ontario, one of Canada's iconic international destinations.

Niagara-on-the-Lake is primarily an adult leisure destination with limited opportunities designed specifically for family, youth and educational markets – Fort George and The Shaw Festival are the exceptions. It is reported that there are 200,000 cars passing by the Town of Lincoln on the QEW each day in the peak season.

In their 2017/18 marketing plan Niagara Falls identified the following target markets:

1. Family memory builders – couples with young children aged 35-54 (Gen Xers)
2. Connected explorers – young couples under 40 with or without children
3. Outgoing mature couples – older retired couples aged 55+ with below average incomes

### 3.3 The Destination Marketing Context

To be effective local and regional Destination Marketing Organizations (DMO's) need to fit under the cascade of marketing efforts conducted at the national, provincial, and regional levels.

#### 3.3.1 Destination Canada

Today, tourism is a pillar of the Canadian economy, generating:

- \$102 billion in annual economic activity;
- 1.8 million jobs; and
- accounting for over 2% of GDP.

Since international visitors use foreign currency to buy Canadian services, tourism is Canada's largest service export, valued at over \$22 billion in 2018 and close to 20% of all service export revenues.

The new federal tourism strategy, *Creating Middle Class Jobs: A Federal Tourism Growth Strategy* focuses on three pillars:

- Empower communities;
- Attracting investment; and
- Renewed focus on collaboration.

The Canadian Experiences Fund, a key component of the strategy has five key areas for investment (all of which have relevance to Lincoln):

- Winter and shoulder season tourism;
- Indigenous tourism;
- Rural and remote tourism;
- Farm-to-table and culinary tourism; and
- Inclusive tourism.

Destination Canada, formerly the Canadian Tourism Commission, was created in 1995 to promote tourism in Canada. It is a Crown corporation, wholly owned by the Government of Canada, which reports to the Minister of Small Business and Tourism and the Minister of Innovation, Science and Economic Development.

Destination Canada has a new tagline **For Glowing Hearts**, inspired by the national anthem and intending to speak to the heart and passion of travel. Destination Canada is increasingly becoming a more digitally focused, data-driven organization.

Target markets are defined using the Explorer Quotient (EQ) research, a market segmentation tool that stems from the science of psychographics. The current target markets for Canadian tourism are Learners and Enthusiastic Indulgents.

- Learners represent 35% of the global market and contain the following EQ types: Cultural Explorers and Authentic Experiencers. Cultural Explorers are avid travellers who value learning and discovery while travelling. They don't want to feel like "tourists," preferring to blend in and have the most authentic experience possible rather than being confined to group tours and schedules. Authentic Experiencers are more learned, understated travellers. Travel is not their only interest in life, but they certainly appreciate it when they go. They prefer to do their own thing while at a destination, to control what they see and when they see it.
- Enthusiastic Indulgents represent 15% of the global market and contain the Free Spirit traveller. Free Spirits seem to love everything about travel and, as in life, they embrace the experiences it offers with arms wide open. Following their energized approach to life and their enthusiasm for travel, Free Spirits are more likely than other types of travellers to find many appealing activities on an international trip. They seek to travel in style and relish being indulged and pampered.

The Cultural Explorer and Authentic Experiencers markets have particular relevance for Lincoln.

### 3.3.2 Destination Ontario

Destination Ontario, legally known as the Ontario Tourism Marketing Partnership Corporation (OTMPC) markets Ontario to the world. It is an agency of the Government of Ontario with a vision to position Ontario as a preferred global destination. Destination Ontario's mission is to generate increased visitation by Ontario, Canadian and international tourists, enhance tourism expenditures in Ontario, and contribute to provincial economic prosperity through impactful marketing and results oriented investment partnerships.

Foundational priorities of the Destination Ontario strategic framework are as follows:

- Increased communication, coordination and partnerships with industry and non-traditional partners;
- A visitor first approach;
- Focus on Indigenous, multicultural and Francophone and LGBTQ tourism offerings;
- Focus on clear outcomes;
- An Ontario brand – Where Am I; and
- Sharing tourism data and research.

Destination Ontario launched Ontario Signature Experiences (OSE) in 2014 to promote and market must-see travel experiences that will appeal to global target markets. The OSE program is designed to showcase the best and most unique tourism experiences in the province that will motivate more people to visit Ontario.

The OSE is linked with the Canadian Signature Experiences Collection (CSE), managed by Destination Canada, in order to both act as a stepping-stone for Ontario tourism operators who aspire to be included in Canada's international marketing and to highlight the diversity of Ontario experiences.



Destination Ontario places significant effort on marketing to Ontarians to travel within Ontario, and to overseas and US travellers in alignment with Destination Canada's marketing efforts. They are working with a tool referred to as Customer Journey Mapping. This process brings a visitor (or "persona") with defined goals, beliefs, motivations and characteristics through a path that shows how they interact with the destination, its touchpoints and stakeholders. The personas that Destination Ontario pursues which are of most relevance to Lincoln and Area include:

- Foodies;
- Culturati;
- Wellness advocates;
- Nature Lovers; and
- Outdoor avids.

### 3.3.3 The Tourism Partnership of Niagara (TPN)

TPN is a non-profit industry led organization funded by the Ontario Ministry of Tourism, Culture and Sport. TPN mandate it to enhance and grow a highly competitive tourism region through visitor-centric strategies and by developing a compelling leisure destination brand that strengthens Niagara's reputation as a world-renowned destination.

According to the Executive Director their role is to assemble the assets and get consumers to consider the destination of Niagara. They see Lincoln as having the potential to pursue short haul markets, essentially an extension of the Niagara market.

According to the Region of Niagara, the tourism sector is largely dominated by small businesses with fewer than 20 employees. Of the businesses with employees in 2018, 67.8% had few than 20 staff, 28.8% had between 20 and 99 employees and 3.4% of businesses had more than 100 employees. The Niagara Falls tourism sector is dominated by large operators.

TPN provides funding to regional DMO's based on levels of visitation and commercial accommodation capacities. As a result the Twenty Valley Tourism Association and St Catharines DMO's receive a much smaller level of funding than Niagara-on-the-Lake.

### 3.3.4 Twenty Valley Tourism Association

The Twenty Valley Tourism Association (TVTA) has been the area's Destination Marketing Organization since 2001. Its focus has been on both event execution and marketing the destination with tactics that include a website, Visitor Guide and map, and more recently media relations.

The 2018-2019 membership structure has 5 broad categories, each with sub-categories based on size and type of operation, resulting in 11 Base Membership options ranging from \$275 to \$2,750. Additional 'Program Committees' with specific mandates (Craft Beverage and Jordon Village) add another 2 add-on membership options. In its first year, the Craft Beverage category has a one-time initial buy-in of \$7,500. The final category is a Trade Membership fee of \$325.

The Twenty Valley Strategic Plan 2017 – 2020 prepared by HLT Advisory in 2016 determined that:

- TVTA brand requires development, not well defined
- TVTA can better engage with members and municipalities
- Outdoor activities are a strong support element to the winery/culinary experience

The market research completed as part of the strategic planning process identified the following opportunities:

- TVTA enjoys huge potential to focus on mid age couples and millennials in GTA;
- Marketing focus to consider high quality wine consumer;
- Target millennials against wine events, also potential for non-wine festival development; and
- Cycling tourist growing at a high rate... capitalize on potential.

The strategy plan acknowledges that a key factor in the development as a destination lies with the proximity to Toronto/GTA. The strategy suggests that with increasing heavy congestion, the key is to create an interception to enable Twenty Valley to become the natural, first stop for visitors entering Niagara. The Consultants (<sup>the</sup> Tourism Company) differ in opinion in that the opportunity is not simply to create an interception but rather the Lincoln area has the potential to become a destination on its own to attract a portion of the large Toronto/GTA market.

The following are excerpts from the Strategy relevant to this current strategy for the Lincoln area.

*The overriding factor for success during the implementation of the TVTA Strategic Plan is in focusing efforts of the organization against the broader scope of Destination Management; by addressing not only the marketing needs of the region, but also in assuming a leadership role in highlighting the tourism product and services required in the future to drive tourism in the Twenty Valley Region.*

*A Destination Management 'approach' considers that the TVTA assumes a role that transcends marketing tactics and event support to one that focuses on 'Destination Management & Marketing (DMM). This subtle difference speaks to the need to work with public & private sector stakeholders to address the tourism product gaps and opportunities, which require support in building an overall stronger offering to the future visitor.*

#### Vision

*TVTA is the leader in destination management having delivered strong results for its stakeholders and by creating a top tourism destination.*

#### Strategic Imperatives

**Improve Brand Personality & Positioning:** *The current Twenty Valley brand personality and positioning does not address the region's true essence. Focus on refining the brand and*



*executional standards in an effort to promote the communities, products and assets that make this tourism area such a hidden gem.*

*Destinations can no longer be marketed as a collection of hotels, restaurants, attractions and retail to be successful. Destinations are as much an emotional and intellectual experience as they are a physical one. Twenty Valley needs to be shaped into an authentic and compelling compilation of experiences and stories.*

**Destination Management:** *The areas of expertise that are required and will need to be activated within the TVTA organization to truly embrace destination management are strategy: funding, project management, relationship management, tourism research, marketing and communications.*

**Inventory Destination Strengths & Resources:** *Initiate asset mapping to provide information about the inventory strengths and resources of the communities TVTA represents and uncover potential solutions to address the needs and gaps. Stakeholder alignment will be a critical element for addressing the gaps.*

**Focus on Stakeholder Communication & Engagement:** *There is an opportunity to improve relations with existing and former members and key stakeholders. This can be achieved with a collaborative approach and an on-going communications strategy to members that is focused largely on outcomes and value.*

### 3.4 Future Tourism Market Trends

When looking at longer-term tourism strategies it is important to understand the major market trends that may influence the characteristics and origins of future tourism markets. The world economy is shifting and creating new markets and new sources of competition. There are major growth opportunities and increasing competition.

There is a major paradigm shift taking place with the world already witnessing a massive shift to emerging markets. The geographic positioning of the world economy is shifting from west

#### FIT TRAVELLERS

This is a common term in the tourism industry referring to free and independent travellers.

to east and from north to south. New markets of staggering potential are beginning to emerge.

A wave of Chinese outbound travellers who are on their second or third trips out of the country will result in an increase in FIT visitors travelling independently and increasingly off of blue-ribbon routes.

### **The natural advantage**

Global biodiversity and habitats are disappearing and remaining pristine and intact natural habitats and areas are of increasing value. Today's travelers, and consumers in general, are becoming more eco conscious, but conscience vies with price.

Recent research has revealed that 60% of Europeans and almost 80% of North Americans cannot see the night sky because of the effects of artificial lighting, while it is imperceptible to the entire populations of Singapore, Kuwait, and Malta. Overall, the Milky Way is no longer visible to more than one third of the world's population.

### **Great expectations**

With growing income and traveler sophistication the focus is increasingly on authentic, unique, and personalized experiences. As travel experiences the world over become richer, there is increasing demand for more sophistication in those travel experiences.

Experiences offer deep engagement with locals and an understanding of the character of the people and places of the destination. Travelers are increasingly looking for the most local experience possible from accommodation, to retail, to food, to connecting with local people. They want authenticity and uniqueness.

### **Experience the destination**

Consumers are prioritizing experiences over things. They are increasingly seeking out authentic, personalized experiences. Travellers today are increasingly drawn to travel as a

form of self-actualization and personal transformation and growth giving rise to the term “transformative travel”.

### **Expect the unexpected**

Sudden and hard to predict events (weather, disease, safety related) are potentially increasing. The past 20 years have clearly illustrated the unexpected and sometimes devastating impacts that can occur in the tourism sector from unpredictable events like SARS, 9/11, and major storms.

### **Digital storytelling**

Information flows more rapidly with the internet, and credibility of information sources is changing. The internet is having a profound effect on travel, in terms of the way people now research and book vacations and the way destinations market and distribute product. The internet is also enabling consumers to increasingly seek advice from other consumers.

An increasing proportion of leisure travellers rely on online sources to evaluate activities while at a destination. Mobile apps are replacing the concierge of the past.

### **The Future is Youth**

The world population is aging and travel will increase at both ends – younger and older age cohorts. The two big markets will be the Millennials (those born between the early 1980’s and the mid 90’s) and the Elder markets.

### **Health is the new wealth**

There is a rapidly increasing consumer interest in all things related to maintaining and improving health, driven by aging, a rising global epidemic of chronic disease and stress and the negative health impacts of environmental degradation. The wellness tourism sector grew by 6.8% between 2013 and 2015 and is forecast to grow by 7.5% annually through until 2020.

The Global Wellness Institute also report that wellness lifestyle real estate is poised for growth at a rate faster than the overall real estate sector over the next decade.

### **On the move**

People are travelling further and more frequently and increasingly off the beaten path. An increasing proportion of travellers are looking to explore out of the way places where they can gain deeper experiences and interact with local populations.

## **3.5 Tourism Market Opportunities**

The Town of Lincoln is already capitalizing to some extent on the pass-through tourism markets for travellers going to and from other regions in Niagara. There is also a burgeoning local culinary and craft beverage market from both directions – the GTA and upstate New York. Many of the wineries are successfully catering to weddings and that brings substantial visitation to Lincoln. Future growth market opportunities that are felt to offer the most significant potential are summarized below.

### **3.5.1 Culinary Tourism**

Ontario's *Four-Year Culinary Tourism Strategy and Action Plan 2011-2015* identified the following three distinct market segments:

- The market comprised of approximately 10 per cent of tourists who plan trips based on the food experience.
- Eighty per cent of tourists who include a food experience into their overall itinerary. While food may not be the primary motivator attracting travellers to that destination, food is of growing importance to that overall experience. The Ontario Culinary Tourism Alliance (OTCA) views this market as having the greatest opportunity for culinary tourism product development.
- The 10 per cent of tourists who are travelling through or touring and make an unplanned stop to eat. OCTA suggest there is an opportunity to promote local culinary tourism experiences at some of these stop--over locations such as service centres and

### Tourism Information Centres.

In 2016 the Ontario Culinary Tourism Alliance in association with Skift published a report titled *The Rise of Food Tourism*, which provides some useful insights into the potential for culinary or food tourism for Lincoln.

One way to develop culinary tourism is through the food culture of a destination, which includes the opportunity to learn about the local food culture and food history and being connected to local growers and producers and dining at restaurants that have chefs that support local food and 'farm to table' experiences.

Destinations looking to build their food tourism offerings can do so in a number of ways.

- DMO's need to engage local stakeholders and bring them onboard as active participants in developing a food tourism culture and experiences. Successful food tourism development delivers a fully integrated travel experience.
- To help determine the "market readiness" of a business or experience through the lens of food tourism, OCTA developed the Experience Assessment Tool (EAT™) in 2012.
- DMO's can also play a role in engaging actual growers and producers in the destination. The farmers, brewers, vintners and chefs are the ones to develop authentic regional F&B experiences. Once a destination has engaged these stakeholders, it can then begin to build out the variety of experiences by working with businesses along the food tourism value chain (restaurants, attractions and tour operators).

Another opportunity is to incorporate local culinary programming at local festivals and events. The following are three strategies from the OCTA/Skift report that could be considered.

1. **Create a network of like-minded hospitality and tourism suppliers.** There needs to be a dedicated network of people and companies who are passionate about local food travel experiences. Reach out to cultural influencers and thought leaders who are active in ancillary fields that can potentially complement the food travel experience, such as music, design and the arts. The food tourist is looking for their experience to be enriched by these areas.

2. **Collaborate with the network to build food experiences.** Co-creation is important to develop a well-rounded food tourism infrastructure in any destination. Once a network of suppliers is established, crowdsource as many ideas as possible to create immersive local destination experiences. Seek out different potential partnerships integrating meals, tours, tastings, lodging, education and entertainment to develop dynamic product opportunities.
3. **Create special events and social media promotions.** Interdisciplinary events combining food and other cultural activities are popular because they attract multiple markets and expand the audience beyond just hardcore food fanatics. It is of primary importance to make sure the people who actually produce and prepare the F&B in the destination are able to engage with visitors at the event.

### 3.5.2 Soft Adventure

According to the Adventure Travel Trade Association (ATTA) adventure travellers are looking for life-changing experience, to enjoy personal growth and challenge, sense of accomplishment and achievement, feeling of gratitude and mindfulness. What formerly was to experience culture is now to “understand” culture.

#### Elements of adventure

- In 2008: risk, hardcore, extreme, danger, power
- In 2018: being in a natural environment, learning, meaningful experiences, and being in a new culture all supersede risk

Soft adventure activity opportunities in Lincoln would include hiking and biking, bird watching, and paddling sports. The bicycle touring market is profiled below as it is one the fastest growing markets today.



### 3.5.3 Bicycle Touring

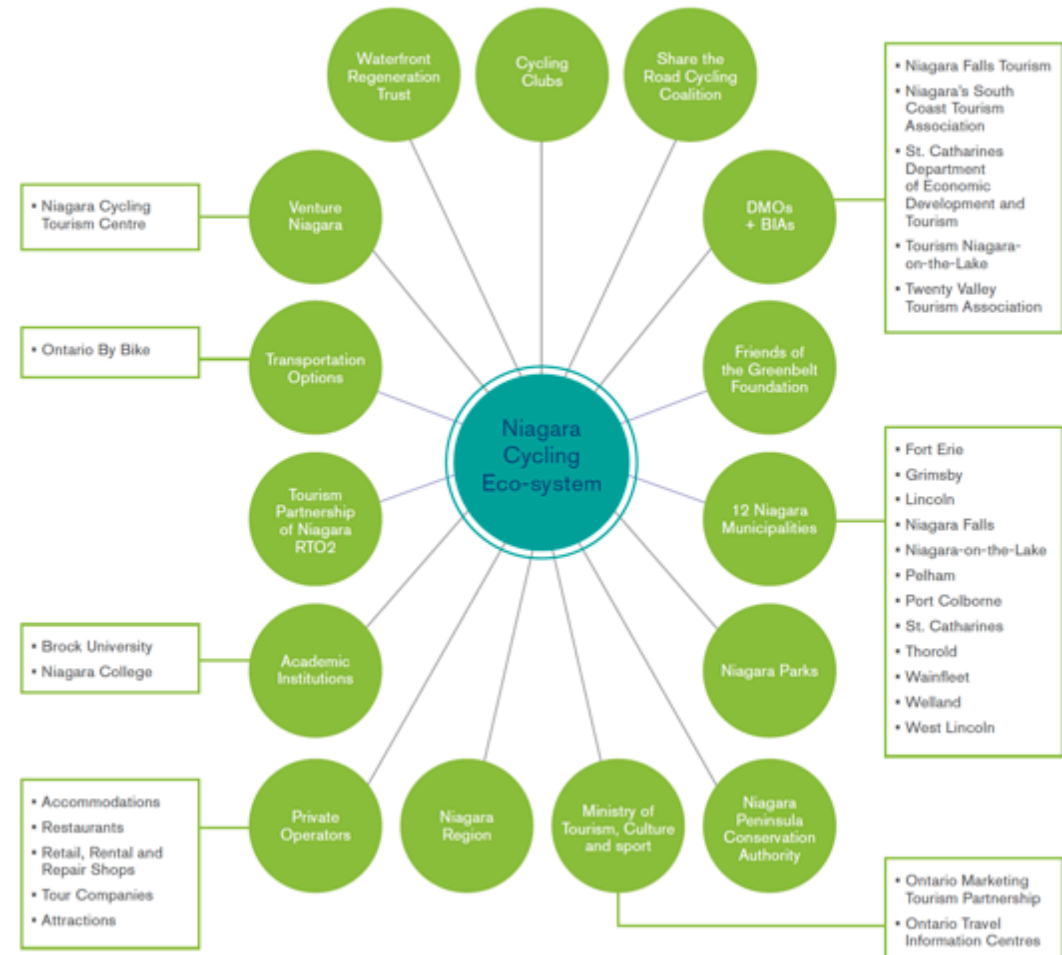
Research on the cycle touring market has determined that the typical characteristics of the cycle tourism market are as follows:

- Professional, middle ranking and senior white collar workers, with above average incomes;
- More likely to live alone or with another person;
- Primarily age 30-55 – the average is increasing;
- Their most popular interests in declining order of frequency include eating out, canoeing, camping, hiking, theatre, shopping, museums/historic sites, water sports/swimming/beaches;
- They use all types of accommodation from camping to 5-star hotels – but B&B/Inns and campgrounds are the preference for multi-day trips; and
- The average length of stay for short trips is 2 nights and for longer trips 7 nights.

Bicycle travellers are typically looking for paved roads or fine cinder paths, restaurant options with nutritious/high protein meals, and accommodation with a safe place to leave bikes, floor access to registration and rooms and washing facilities.

Quebec is the leading model for bicycle tourism in Canada.

### Niagara Cycling Tourism Eco-system



The *Niagara Cycling Tourism Report*, 2016 identified the following characteristics for the cycle tourism market to Niagara:

- A review of travellers who came to Niagara for a cycling holiday in 2012 revealed cycling tourists frequently stayed 1-2 nights, were between the ages 35-64, male (54%) and female (46%), well-educated and travelled predominantly with adults only (93%) in parties of 3 or more persons.
- Typical cycle tourists are:
  - Age: 45-64
  - Gender: Male
  - Household Income: +\$100K
  - Well educated, experienced road cyclist, rides in groups of 2 to 4 and travels in Ontario with bike
- Of the top activity preferences while on a cycling trip, Niagara offers all, including culinary experiences, hiking, camping, wine tasting, shopping and visiting cultural sites and museums
- In 2012, approximately 98,000 cyclists visited Niagara - 97.8% stayed-overnight and spent approximately \$229 per visit resulting in a 16.7% increase in visitation based on cycling activities and a +\$81 per visitor spend in two year
- A World Travel Market report published in 2014 suggests cycling holidays are becoming more popular than golf getaways in the US, with reported cycling enthusiast numbers climbing to 3.8m in 2013 (up from 3.5m in 2012)
- Each of Niagara's 13 municipalities plays a significant role in the development and promotion of cycling tourism product across the region.

#### 3.5.4 Wellness Tourism

The Global Wellness Institute (GWI) defines wellness as: the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health. The wellness economy is a colossal global industry, estimated by the GWI as \$4.2 trillion and representing roughly 5.3% of global economic output in 2017. From 2013-2017, the wellness economy grew from \$3.4 trillion to \$4.2 trillion, or by 5.8% annually – a growth rate over five times as fast as global economic



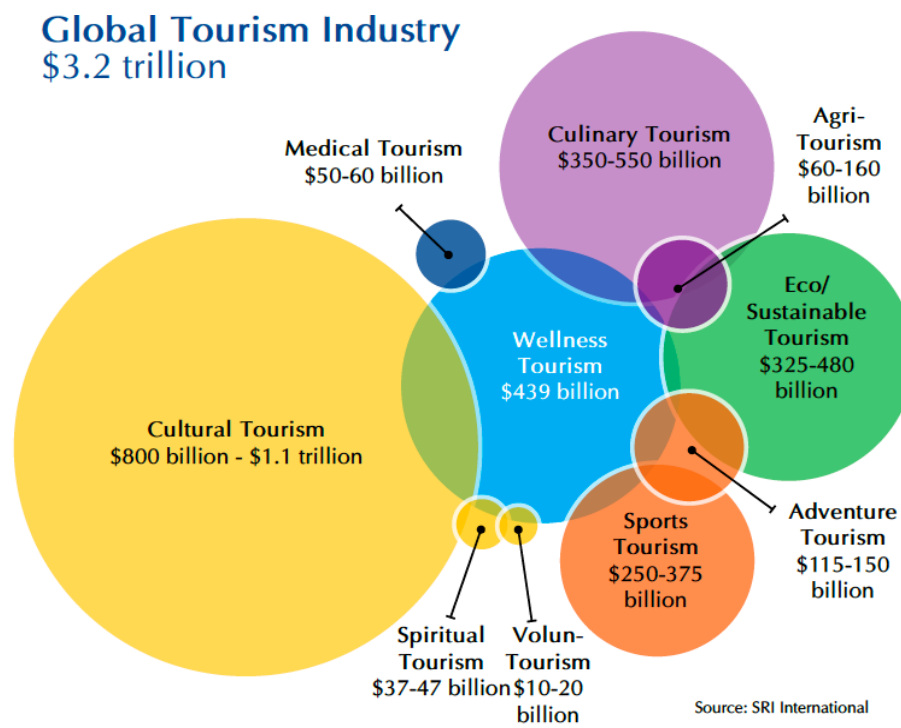
growth. As an industry, wellness has numerous potential cross-cutting implications for development – not only in terms of economic development, competitiveness, and growth, but also in the arenas of health, urban planning, environmental and cultural sustainability, workforce, equity and diversity, social and cultural affairs, and much more

In 2013 SRI International (a research firm started at Stanford University) conducted the first benchmarking and analysis of the wellness tourism economy. The research was commissioned by the GWI an international think-tank that brings together leaders and visionaries from private and public sectors to positively impact and shape the future of the wellness industry. The following diagram illustrates the scale of wellness tourism in comparison to other sectors as well as the overlaps.

It is interesting to note that wellness tourism overlaps in a significant way with some of the strongest growth markets such as ecotourism, culinary tourism/agritourism and adventure tourism all areas of opportunity for the Lincoln.

Recent research conducted by GWI and presented in the report *Understanding Wellness: Opportunities and Impacts of the Wellness Industry for Regional Development, 2019* has identified the following characteristics of wellness tourism:

- A large portion of wellness activities and businesses are service-oriented and therefore help create jobs. In addition, many wellness sectors are dominated by small and local owned enterprises that serve a local clientele and use local products and services
- Wellness consumers increasingly favor authentic, organic, locally sourced, and sustainable products (e.g., fresh produce and foods, skincare and personal care products, herbal and traditional remedies, etc.) and are often willing to pay a premium for them.



- There is a growing recognition that individual wellness is inextricably linked to wellness of place and planet.
- Wellness consumers seek out things that are authentic, local, and unique; in response, wellness industries and businesses are increasingly supporting and developing local culture and heritage rather than cookie-cutter, mass-produced offerings.
- Successful wellness tourism development depends upon environmentally- and socially sustainable destinations that preserve and celebrate the uniqueness of local natural and cultural assets. Wellness tourism brings tourists with higher spending patterns, interest in getting “off-the-beaten path,” and interest in traveling off-season
- Wellness real estate incorporates human health and wellness as a central concept in urban planning, real estate, and infrastructure development, rationalizing and reinforcing other development priorities such as sustainability, community safety, walkability, livability, and diversity, in addition to health.

More recent research by the Global Wellness Institute, in 2019 has determined that the global wellness tourism sector is now a \$639 billion market representing 14% of the global wellness market, as illustrated.

Lincoln has significant potential to further develop wellness tourism products and experiences building from the core tourism assets of agriculture, and more particularly the growing regenerative agriculture sector, the protected and unique natural environment, and the trails and other outdoor recreation opportunities.



### 3.5.5 Festivals and Events

Festivals and events can be powerful tools for building community pride and capacity, as well as for 'place making' and delivering economic benefits. They can bring residents and visitors to areas targeted for urban transformation, capturing visitation and media attention from well beyond the normal market trading area, and support destination objectives for enhancing civic pride, building community capacity, and celebrating local culture and heritage. Examples from Prince Edward County and Bala are outlined in the box to the right.

Spectators attending festivals and events are not significantly different from those visiting traditional "bricks and mortar" attractions. However, festivals and events differ in a number of important ways from other forms of more traditional entertainment activities. They can:

- Increase the attractiveness of the destination to visitors and locals;
- Generate incremental media coverage and publicity;
- Increase visitation from new and returning visitors;
- Contribute to the development of new infrastructure;
- Increase event production expertise and resources; and
- Increase community pride, job opportunities and volunteerism.

Perhaps the most significant advantage of festivals is the speed of development: while the timeframe for a new 'bricks and mortar' attraction is often measured in decades; a festival can grow from inception to fruition in a matter of months.

#### EVENTS THAT CELEBRATE UNIQUE FEATURES TO DRIVE VISITS

##### Prince Edward County:

PEC has extended the tourist season from 3 months (June to August) to 7 months (April to October) in part due to hosting a series of annual signature festivals and events, many outside the busy peak season. Events cover a full spectrum of music (classical, jazz, country), yoga, fishing, authors/writers, nature and more that include:

- *Maple in the County* (March) a two-day, self-directed celebration of maple syrup season.
- Twice annual *Countylicious* prix fix dining experiences in typically low seasons of April and November, creating demand for area accommodators, restaurants, retailers and more;
- *Art in the County*, a juried art exhibition and sale, held late June into early July (June 21<sup>st</sup> to July 7<sup>th</sup>, 2019) in its 26<sup>th</sup> year;
- *PEC Jazz Festival* (August 17<sup>th</sup> to 25<sup>th</sup>, 2019); and
- *Gran Fondo* cycling event (September 7<sup>th</sup>, 2019) second annual.

##### Bala Cranberry Festival:

Always held the weekend after Thanksgiving, the purpose of the Bala Cranberry Festival is to extend the tourist season and to improve the quality of life in their community by providing financial assistance to organizations and individuals in need.

In addition to Local Events, which have little tourism appeal and limited local benefit, there are three major categories of special events, two of which have substantial tourism impacts/benefits.

**Community Events** originate from within the community and are usually produced by local residents. Community Events can focus on a specific audience or stakeholder group (e.g. children, dog owners) but are most often promoted to the community at large. Some Community Events have the potential to grow into events that attract visitors from beyond the community.

**Signature Events** are recurring events possessing such significance, in their tradition, attractiveness, image, or publicity that they provide the host community with a competitive advantage. Over time, the event and destination can become inseparable in terms of their image e.g. The Royal Winter Fair in Toronto.

**Mega Events** may be distinguished by their focus on international participation and visitation, level of public funding, infrastructure and legacy development, and economic impact. Mega events have strong national and international recognition and appeal, typically generate substantial media attention and image awareness, have an extraordinary budget and lasting impact, and often require a financial investment by the host destination and senior levels of government. The major tourism events that Newfoundland & Labrador created including the Cabot 500 Celebrations in 1997 and the Vikings! 1000 Years celebration are both good examples. Both of these events were designed with tourism objectives.

Many jurisdictions are realizing the potential in developing major tourism events around historic milestones like centennials/bicentennials to grow tourism awareness and visitation. Destinations are becoming increasingly sophisticated in the way they strategically use events to grow tourism, extend seasonality in the local tourism industry, and in turn attract and stimulate new private sector investment.

Lincoln has some strong events to build on in developing a year-round calendar of tourism events to showcase the unique tourism attributes and experiences available and to help spread and develop year-round tourism visitation.

### 3.5.6 Artisanal/Boutique Beverage Tourists

Travel increases visitor awareness and familiarity of a country's culture, customs and regions. It also exposes visitors to new products, which in turn, increases demand and endorsement for these products abroad. There are an increasing number of artisanal beverage destinations in Ontario as well as upstate New York.

Tourism has become of increasing importance to the wine industry globally as it strives to diversify beyond wine production to add value and distinction to brands and compete profitably in a highly competitive market.

Research by Deloitte (*Passport to Growth; How International Arrivals stimulate Canadian exports, 2014*) has determined that there is a correlation between international tourism visitation and the export of goods between the destination country and the visitor country. A rise in business and leisure travel between countries can be linked to subsequent increases in export volumes to the visitor countries as well as increases in the variety of goods sold. Using Statistics Canada data Deloitte have shown that a 1% increase in Canadian international arrivals could generate an \$817 million increase in Canadian exports.

In 2016 the World Tourism Organization (UNWTO) held the 1<sup>st</sup> Global Conference on Wine Tourism in Georgia. The theme behind the conference was developing the link between wine tourism and a destination's culture, history and lifestyle. This recognizes that the real differentiator for wine and beverage destinations lies in the unique cultural and natural heritage assets and opportunities experienced through creative and innovative storytelling. In establishing the fundamentals around wine tourism the conference agreed:

- Wine tourism is a fundamental part of gastronomy tourism;
- It can contribute to sustainable tourism through tangible and intangible heritage of the destination;

- It can play an important role in preservation of cultural and natural resources;

UNWTO research points to the following order of magnitude scale of wine tourism globally:

- in the US, wine tourism is dominated by domestic visitors and it is estimated that 15 million travellers were motivated by wine tourism in 2014;
- in the same year there were up to 10 million wine tourists in France and 5 million in Italy;
- Argentina supports 1.5 million wine tourists with a considerable proportion from international sources;
- Spain has relatively few wine tourists at 2.1 million ; and
- New Zealand and Germany each have 1 million.

UNWTO research points to two types of wine tourist:

- **Specialist winery tourists** visit a vineyard, winery, wine festival or wine event for the leisure purposes and their primary motivation is a specific interest in wine or embarking on a wine-related experience; and
- **Generalist tourists** are primarily motivated to visit a wine region for other reasons and choose to visit a winery as part of a wider tour or trip.

Millennials, have emerged as the generation that consumed more wine than any other in 2015 according to Fortune, drinking 42% of the total and an average of 3.1 glasses per sitting.

The infrastructure around wine tourism often includes wine education centres, boutique hotels and character accommodations, restaurants, corporate facilities, beverage trails and other components which promote the industry. Wine tourism is also growing due to an increased interest in environmental issues, which has led to growth in eco- and agritourism that encompasses vineyards. There has been further consumer growth and interest in dining and cooking, which is reflected in the rise in restaurant revenues as well as the number of new TV cooking shows.

A “café society” trend has been identified where people want to enjoy life more through the culinary arts and take time to enjoy conversation with friends and family over a meal. Wine, and other beverages are a natural part of this trend.

### 3.5.7 Agritourism

Agritourism is an increasingly popular and growing opportunity for agricultural producers. Agritourism can provide additional ways to sell local products direct to the market, create value producing connections within the tourism sector (i.e. through culinary tourism), as well as add supplementary income to farm operations. Common agritourism businesses or programs being added in many destinations worldwide include:

- Farm stays;
- Farm markets and lane markets;
- Farm to table culinary;
- Agricultural entertainment, recreational and education experiences;
- Agricultural and food trail development;
- Artisanal food production;
- Food festivals;
- Creative agricultural history interpretation and storytelling; and
- Farm work experiences.

These activities are not typically motivators for travel, but rather part of a broader itinerary. However, there are some opportunities, such as more in-depth learning and experiential opportunities that are of interest to a particular sector.

Further development of agritourism in Lincoln can leverage the strength of the agricultural economy and present opportunities for farmers to generate often times supplemental income through tourism.

### 3.5.8 Cannabis Tourism: A Future Opportunity

Cbd (cannabidiol) is used as a medicinal ingredient in a range of products, from foods to cosmetics. Thc (tetrahydrocannabinol) is a psychoactive ingredient. Cbd is not the only cannabinoid. Future research is likely to result in a range of other cannabinoids in specific combinations with each other and with thc created for specific ailments. For example, thc converts to cannabinol (cbn) as the plant naturally ages or is exposed to heat/oxygen. Cbn is reported to have sedative, pain relief, antibiotic and anti-inflammatory properties as well as being an appetite stimulant and stimulating bone healing.

In other parts of the world where legalization has been introduced, cannabis tourism is injecting hundreds of millions of dollars in direct and indirect revenue. According to a Skift report some 82.4 million travelers visited Colorado in 2016, two years after the state became the first to legalize marijuana. Colorado Tourism conducted a survey in 2016 that found 15 percent of those visitors (about 12 million) participated in a marijuana-related activity, and 5 percent reported it as a motivation for their trip.

According to the Smith Falls (Ontario) Cannabis Tourism Strategy (2019/20) some estimates in Canada suggest the sales of recreational cannabis in Canada could be as much as \$5 billion per year, attracting between 150,000 to 250,000 cannabis tourists annually.

The following presents a summary of the sectors that could be disrupted by cannabis.

#### Beverage Sector

In the beverage sector the industry is headed in a low and non-alcohol direction and Euromonitor suggest a future where thc replaces alcohol in beverages with an intoxicating buzz is not far off. The effects of thc in alcohol are still being researched.

The global soft drinks industry is increasingly driven by the health and wellness trend, and as low- and non-alcoholic beverages grow in popularity and sugary drinks decline, there is a growing opportunity for the development of cannabis beverages.



### Tobacco Industry

Increasing cannabis legalization is expected to have a transformative role in the tobacco industry, which has seen cigarette volumes and smoking populations plummet across developed markets.

### Personal Care Products

Hemp seed oil beauty and personal care products have long been on the market. Today cbd, is replacing hemp with its anti-oxidising, oil-balancing and anti-inflammatory properties. Cbd-infused beauty product launches are largely prevalent in skin care, toiletries and cosmetics. Euromonitor International expects skin care to be the main driver of cannabis beauty growth.

### Health Products

Cbd products exist in a growing variety of consumer health categories, such as dietary supplements, topical analgesics and sleeping aids. Cannabis is a natural, homoeopathic alternative to pharmaceuticals for the relief of chronic pain, stress and insomnia.

The global market for vitamins and dietary supplements is predicted to be the largest cannabis-driven over the counter market by 2025, with 2% of total value sales to be cbd- or thc-based, followed by topical analgesics, sleeping aids and sports nutrition.

Hemp-based food products, such as hemp seeds, oil, plant-based milk alternatives and protein bars, have long existed on the shelves of health food stores. Euromonitor International expects global sales of cbd packaged foods to double over the next two years, as consumer awareness grows of the ingredient's benefits.

The tourism industry will be able to capitalize on cannabis related opportunities in ways similar to the alcoholic beverage sector, in wellness tourism, and possibly in the culinary sector.

The cannabis beverage sector could add another category to Lincoln's growing beverage sector. Cannabis related products could be developed locally to bolster both the Lincoln wellness and culinary tourism segments. Given the controversy locally over grow-ops this market opportunity may not rise to the top of the list of future market opportunities.

### 3.5.9 Indigenous Tourism: A Future Opportunity

Between 2014-2017 tourism across Canada grew by an estimated 14.5%. Over the same period Indigenous tourism grew at an estimated 23.5%. According to the Indigenous Tourism Association of Canada (ITAC) Indigenous tourism in Canada continues to exceed expectations with a total of 1 in every 3 international visitors being interested in an Indigenous experience.

**ITAC makes is very clear that Indigenous tourism must be planned, developed and owned/operated by Indigenous peoples, not another non-Indigenous owned/operated attraction about Indigenous peoples.** Too often in the past Indigenous stories have been told from the non-Indigenous perspective. Indigenous tourism must be developed by Indigenous peoples for Indigenous peoples benefit.

Destination Canada has identified Indigenous tourism as a significant growth opportunity. Recent research they conducted in partnership with ITAC presents compelling statistics on the growth opportunities for Indigenous tourism. The report *2019 Market Snapshots: Understanding the Opportunity for Indigenous Tourism Business in Canada* suggests the largest geographic markets opportunities are the US market (17.5 million US travellers interested in the next two years) followed by China (3.8 million), then France and Canadian domestic travellers (2.6 million each) followed by Germany (2.4 million). For the French, German and Chinese markets to Canada Indigenous tourism ranks in the top 10 activities of interest.

According to Destination Canada international travel markets are most interested in:

- Enriching, engaged, immersive experiences with Indigenous people;
- Experiences that are related to nature and learning;
- Authenticity;
- Seeking benefits of 'discoveries' and 'adventures';
- Connection to nature and Indigenous way of life in context of spirituality and culture traditions; and,
- Entertainment oriented experiences and those that distance the traveler from Indigenous people are of lesser value and interest.

### 3.5.10 Sport Tourism: A Future Opportunity

Sport tourism can be defined as any organized sports-related activity including organized competitive events, trials, try-outs or training camps, clinics, exhibitions and sports-related meetings.

Participants can include:

- Active participants—those who engage in sport for the purposes of competition with others, under a set of rules, or to improve their personal sporting performance;
- Volunteers—individuals who volunteer their time and expertise in sport (for example, as a coach, a driver, an official or a fundraiser); and
- Spectators—individuals who attend sporting games or events to observe.

The market for sports events may be segregated by:

- the nature of the event activity – single or multi sport;
- the geographic focus of the event – local, provincial, regional, national or international;
- invitational events – events that are open to a limited number of participants that meet specific event criteria (performance standards, league standing, win-loss record);
- professional sports teams – while most of the attendance at professional sporting events is from the local or day-trip market, professional sports events do generate economic activity from visiting teams, out of town spectators and from post-season play; and
- competitive versus non-competitive events (e.g. coaching clinics).

Sport tourism activity can also be classified to identify:

- Championships: These are single-sport properties with rights held by the respective provincial, national or international sport organization.
- Tournaments: Tournaments are single sport, non-championship events. Many are arranged by local sport organizations. They are generally held in the same place at the same time every year and can become a familiar part of the community's annual calendar.

- Games: These are multi-sport events, staging a number of sport disciplines at the same time, such as the Canada Summer Games coming to Niagara in 2021.
- Camps, Clinics, Courses and Conferences: Although sport tourism is most often associated with competitive activity, training camps, skills clinics, training programs for coaches and officials, annual general meetings and conferences related to sports are also considered sport tourism activities.
- Created Events: A sport event may be created by a community, facility, or corporation primarily for commercial or tourism purposes.

Lincoln's role with 2021 Canada Summer Games is a good example of sport tourism benefit. The Canada Summer Games are being held in Niagara Region. More than 5,000 young athletes and their coaches will gather to compete for the podium in Canada's largest multi-sport event. The 2021 Canada Games will celebrate the wonder of sport alongside arts and culture. The roles for Lincoln in the 2021 Games are reported as follows:

- Bringing a test event in baseball (2020);
- Contributing to a training pool that will be used at Brock for 2 weeks during the Games and will come to Lincoln afterwards for permanent installation (to replace the Jordan pool);
- Lincoln will participate in the '*13 for 13 Cultural Plan*' to welcome athletes into the community.

Attracting new sport tourism events is a matching process that begins with identifying prospective events with technical requirements that can be met by the city's sports facilities, organizational capacity, financial resources, and hosting infrastructure. The Town of Lincoln's gap in commercial accommodation poses a challenge to establishing a unique market position to compete with other municipalities attracting traditional sport events. For example, hockey is reportedly the biggest draw for tournaments in Lincoln, however the Town loses the most significant economic benefit in that most people likely to stay outside Town in places like Niagara Falls.

Sport tourism is not seen as a priority tourism opportunity for Lincoln until such time as the accommodation gap is filled and Lincoln can fully benefit from the economic opportunity offered through sport tourism. This is not to say that sport tourism opportunities should not be pursued, as in fact they should. But for the DMMO sport tourism is not a priority market at this time.

### 3.5.11 Cultural Tourism: A Future Opportunity

Culture is a fundamental part of the global tourism experience, and its importance is growing. According to the UNWTO cultural tourism is one of the largest and fastest-developing global tourism markets: an estimated four out of ten tourists choose their destination based on its cultural offerings.

Historical models of cultural tourism based on tangible heritage (castles, forts etc.) are being augmented by growth in intangible heritage and creativity. Cultural travellers are increasingly attracted by intangible cultural aspects of a place - by a place's culture, history, and traditions. Intangible cultural components can be presented to the travellers by creative storytelling approaches.

The benefits of closer links between culture and tourism go beyond the economic returns and can include establishing new cultural ties, fostering cultural preservation, and stimulating cultural understanding and appreciation.

The ageing baby boomers worldwide are avid cultural consumers and they are reaching the point where they will have the time and inclination to travel more as they retire and/or become empty nesters. Culture and heritage are emerging as strong complementary motivators to nature-based activities for this market.

Consumers are increasingly seeking uniquely different experiences when they travel, and are beginning to express new requirements of the destinations and travel providers they choose.



The geotourism research conducted by the Travel Industry Association of America for National Geographic Traveler (2002) characterized over one third of the American travelling public (55.1 million Americans) as geotourists. These are travellers who are concerned with preserving a destination's geographic character including the entire combination of natural and human/cultural attributes that make one place distinct from another. These travellers prefer culturally and socially oriented travel where they can meet and learn about local people. They are concerned with protecting the environment in their destinations they visit. The geotourist market is closely related to ecotourism but somewhat more broad, including cultural tourism that is not necessarily nature-based.

According to Parks Canada, research Cultural tourists are visitors to a destination with the primary motivation of searching for and participating in new and deep cultural experiences, whether aesthetic, intellectual, emotional, or psychological. The UNWTO (*Survey on Big Data and Cultural Tourism, 2015*) states that 40% of international arrivals fall into the category of cultural interest travellers. A 2015 survey by Solimar International indicates over 1/3 of U.S. travelers agree that "specific arts, cultural or heritage events will influence their choice in a destination" and "*many travelers extend their stay in a destination because of cultural activities.*" When considering the value of cultural heritage tourism, Destination British Columbia looks to a 2009 study conducted by the U.S. National Trust for Historic Preservation that found "*cultural heritage tourists spend an average of \$994 per trip, compared to \$611 for the 'general' traveler – almost 50% more.*" Not only can cultural tourism activities add value for visitors, it can also help preserve cultural traditions and history.

According to Destination Canada's Explorer Quotient research 12% of the global market for Canada can be categorized as Cultural Explorers, a market segment *defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.*

*The Cultural Explorer is an avid traveller who values learning and discovery while travelling. They don't want to feel like a "tourist," preferring just to blend in and have the most authentic experience possible rather than being confined to group tours and schedules.*

A second important market segment for Canada and Ontario are Authentic Experiencers representing 9% of the global market for Canada. Authentic Experiencers are *typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit. Love to learn about and absorb themselves in the ancient history, as well as the modern cultures, of the places they visit.*

## 4. Analysis of Lincoln as a Tourism Destination

### 4.1 Town of Lincoln Economic Context

#### Lincoln Economic Strategy

The overarching goal of economic development is to improve the economic well-being in the communities within the Town. It is a long term, incremental endeavor that also seeks to enhance the quality of life in balance with other community goals, such as sustainability and overall complete communities.

The four sectorial pillars and areas of focus for Lincoln are:

1. Agriculture – supporting initiatives to grow the agricultural sector revenues, competitiveness, and innovation
  - Agritourism
2. Food and beverage – attract and grow local food and beverage ventures
  - Expedited approach for developing micro-breweries and distilleries, brew pubs and licensed restaurants
  - Undertake feasibility study for Lincoln Farmer's Market
  - Collaborative retailing for alcoholic beverages
3. Tourism – develop comprehensive Lincoln centred tourism strategy and action plan
  - Attract new investment
  - Wayfinding signage program based on tourism branding
  - Expand e-information for visitors
  - Explore new models for transportation from Toronto and within the area
4. Manufacturing – retention, growth and investment attraction.





There is significant overlap between tourism and two other pillars, namely agriculture and food and beverage. As noted earlier there is a correlation between tourism and export of products from the destination.

#### 4.2 Tourism SWOT Assessment

The following figure presents a summary of some of the most critical strengths, weaknesses, opportunities and threats for Lincoln as a destination.

Critical SWOT's	
<b>Strengths</b> <ul style="list-style-type: none"> <li>• Abundance of market ready individual experiences</li> <li>• Diversity of boutique wineries and beverage producers</li> <li>• Rich history evident in buildings, landscapes, archaeology, and intangibles</li> <li>• Proximity to domestic and international markets (i.e. 6 million in GTA, 20 million visitors)</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>• Accommodation capacity</li> <li>• Transportation within the Town and area and to Lincoln</li> <li>• Some products and experiences are not market ready (i.e. cycle tourism)</li> <li>• No Niagara Parks Commission in Lincoln</li> <li>• Not pulled together as a destination</li> </ul>
<b>Opportunities</b> <ul style="list-style-type: none"> <li>• Lake Ontario shoreline and harbours</li> <li>• Niagara Escarpment</li> <li>• The Greenbelt</li> <li>• Adaptive reuse of heritage buildings</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>• Mass (volume) tourism from QEW and Niagara Falls</li> <li>• Urbanization</li> <li>• Proliferation of competitive beverage destinations both domestically and internationally</li> </ul>

## 4.3 Key Success Factors

To be truly competitive in pursuing domestic and international markets a tourism destination has to be strong in all the following areas (not necessarily in order of importance):

### 4.3.1 The Motivating Attraction or Draw

There must be an overriding compelling reason to visit any destination. This could be the landscape, the waterscape, the region's historical significance, or a single major attraction or event.

For the Lincoln centred destination, the motivating draw is the unique escarpment/bench/lakeshore physiography that defines the destination and provides unique and diverse micro-climates and growing conditions at the western end of the Niagara Peninsula. The high quality agricultural and natural environment, and in fact the areas interesting and rich history is directly tied to this unique landscape.

### 4.3.2 Quality of Supporting Infrastructure and Complementary Products

The support infrastructure includes accommodation, food services, entertainment, shopping, and visitor information. The primary products or attractions may provide the overriding reason to visit a destination, but the complementary products can be equally important in creating a desirable image for the destination and influencing level of satisfaction with a visit.

The destination has a growing culinary and food services sector, a major weakness in commercial accommodation, one good tourist friendly village/retail area (Jordan Village) and lacks coordination and has gaps in visitor information services.

#### LINCOLN CENTRED DESTINATION

The destination encompasses adjacent rural/agricultural areas in municipalities when strategically appropriate and from a visitor's lens.

### 4.3.3 A Mix of Quality Attractions

Successful destinations have a mix of attractions with the following attributes:

- Unique and/or original/authentic (curiosity is a strong tourism motivator);
- Critical mass;
- Year round or multi-season weather appeal;
- Ability to appeal to a broad range of markets with some compelling reasons for more distant markets;
- Attractions that can grow and/or evolve to maintain their appeal; and
- Aligned with the desired image of the destination or community.

The destination has a strong critical mass of high-quality attractions (wineries, distilleries, brewery, agritourism products and farm markets, and several natural attractions). There are a number of undeveloped and/or non-market ready attraction and asset categories including natural and cultural heritage resources/assets that offer significant additional potential.

### 4.3.4 The Need to Differentiate

Sustainable growth can best be achieved by focusing on attributes that cannot easily be duplicated in other destinations, while preserving the environmental/locational elements that already are the major draw.

There is a need and opportunity to build on the unique features, stories and assets to complement the key attractions and differentiate the destination in the marketplace. There are an increasing number of beverage destinations in Ontario and upstate New York, and that alone is no longer enough to differentiate.

### 4.3.5 Accessibility of the Destination

Access to markets is critical. External accessibility refers to different access modes, ease of access, cost of access, quality of reception facilities, intramodality (the ability to transfer from one travel mode to another), and the variety of travel modes.

Being situated on the major highway corridor between Toronto and Niagara Falls, and upstate New York this destination suffers from access congestion at peak periods and requires creative new access options.

There is a need and opportunity to further develop the slow transport options within the destination, recognising the best way to experience the unique agricultural and natural environment is by slowing down. This would include options by foot, by cycling and by motorized vehicle.

#### 4.3.6 Image

Travellers develop opinions about destinations that can play a significant role in their destination selection process. A positive tourism image, including (increasingly) via social media, can have a constructive impact on the image of the destination in general and can enhance the community's reputation as a business venue and a desirable place to live.

The Lincoln destination is a hidden gem. It has not yet been placed on the tourism map despite the efforts of TVTA. There are confusing image messages going out into the market by organizations like the Wine Marketing Association of Ontario and the Ontario Culinary Tourism Alliance, to name a few. The destination needs a stronger image that is more consistently positioned within the target markets.

#### 4.3.7 The Importance of Local Market Support

The local attitude towards tourism must be supportive. Residents are the best ambassadors for any successful destination. They will also be the prime beneficiaries and significant effort will need to be placed on building local capacity for tourism, maximizing the local employment.

Increased effort needs to be placed on creating awareness locally on the benefits and importance of tourism both to the local economy, in the communities and helping to support and maintain the local cultural and natural heritage resources. Without strong local population support for tourism there is increasing risk of future conflict.

#### 4.3.8 Strong Accountable Marketing Support

There is a direct relationship between marketing expenditures and visitation levels. Perhaps the most important impact of competitive destination marketing is the ability to target and attract desired market segments.

The destination has had comparatively weak marketing support with insufficient accountability. There is significant opportunity to foster more and better collaboration throughout the destination and increase the size of voice in the marketplace.

#### 4.3.9 Enabling of Private Sector Investment

The public-sector role in a successful destination should be to invest in setting the stage to stimulate private sector investment and entrepreneurship.

There is growing effort on private sector investment attraction with increased emphasis on tourism required. This is particularly important to help fill the current accommodation gap in ways that complement the destination attributes and advantages.

#### 4.3.10 Definition of the Destination from the Visitor's Perspective

This is a very important success factor and one that is often overlooked by government officials. Tourists do not look at geographical boundaries when making their vacation or travel plans. They are typically looking for an overall experience that, likely, crosses over boundaries.

There is increasing recognition that the visitors' perspective of the destination is not limited by political boundaries. The destination is quite clearly defined by the unique physiography and the strong rural/agricultural landscape squeezed in between urban areas to the east and west.

#### 4.4 External Influences

The following are critical considerations in developing a tourism strategy for Lincoln.

##### **Quantity versus Quality**

The typical government approach and focus is on measuring tourism volume rather than value in terms of the benefits of tourism in destinations, and in turn marketing with a focus on quantity of visitors i.e.:

- The economic value within the destination (excluding economic leakage);
- How tourism helps to preserve the natural and cultural heritage that tourists are coming to visit; and
- How tourism helps enhance the livability of the destination communities.

##### **Climate change**

Climate change is one of the most important long-term issues facing the tourism industry. It is already having an impact on the tourism seasons (i.e. shorter snow seasons) and traveller's buying behaviour (i.e. seeking more sustainable travel solutions and destinations). These trends will increase and the demand for ecotourism or sustainable tourism will increase. The increasing likelihood of climate and emission taxes along with the rising cost of gas will undoubtedly change travel patterns. The proposed alternative access routes to Lincoln may help mitigate this challenge.

##### **Overtourism**

*An excessive number of tourists visiting a destination or attraction, resulting in damage to the local environment, historical sites and leading to a poorer quality of life for residents. This is a phenomena resulting from cheaper air fares, rising incomes, population growth and social media's ability to laser focus on specific 'instagrammable' destinations and attractions.*

This is a relevant concern in a destination like Lincoln where the quality and authenticity of the place is a competitive advantage and differentiator combined with the huge volumes of travellers going past every day to and from Niagara Falls.

### **Access to the Destination**

Already on summer weekends the traffic snarls on the QEW make it difficult to predict and cope with travelling to and from Niagara from the GTA. This situation is only going to worsen as the populations grows. Alternative transportation options into the destination must be part of the strategy.

## **4.5 Competitive Advantages**

The destination is defined by its rural and agrarian landscapes with the Niagara Escarpment, Benches, and lakeshore providing for diversity of landscapes and unique growing conditions. The regions key competitive advantages are as follows:

8. Proximity to markets – GTA /Golden Horseshoe and upstate NY;
9. Agrarian rural landscape;
10. Topographic diversity with escarpment, benches, creeks, harbours, and the Lake Ontario shore;
11. Quality and quantity of artisanal and boutique beverage makers offering creative experiences – wineries, brewery, distillers, meadery and cider houses;
12. Unique cultural heritage;
13. Authenticity and scale; and
14. Tender fruit growing.

The real unique differentiating features from other parts of Niagara and other destinations in Ontario are the benches (physiographically, climatically and aesthetically).

**This destination lends itself to exploration, slow travel, and serendipitous discovery.**

## 4.6 Benchmarks

Practices from three established and successful tourism destinations that share characteristics with Lincoln including rural economy dominated by agriculture and/or wine growing, home to a number of settlement communities and accessible from nearby major urban centres were reviewed to identify inspiration and lessons to inform the tourism strategy under development. Destinations reviewed are:

- Prince Edward County, Ontario
- Napa Valley, California
- Hawke's Bay, New Zealand

Highlights on key lessons from this review follow. A more detailed review is included in Appendix A.

1. **Take the long view with a shared plan and strategy:** A sustainable tourism economy takes continuous effort – to refresh and update visitor experiences, to adapt to changes in consumer interests, to respond to new partnered opportunities, to attract new investors, and investments as well as new entrepreneurs, in and beyond the hospitality sector.
2. **Nurture and facilitate tourism as part of an integrated economy:** Successful tourism destinations position the tourism portfolio as an integrated part of long-term planning.
3. **Broaden appeal with a focus on community's unique assets:** Successful tourism destinations provide a range of activities for visitors to engage in. This does not mean, however, that 'there is something for everyone'. Rather it means identifying what stories, landscapes, wildlife and other assets unique to the region are offered.
4. **Drive visits with Festivals and Events:** Festivals and events give visitors a reason to visit, motivating commitment to a specific date or timeframe. A well-managed events calendar is an important factor to sustainable tourism destinations.



5. **Adopt unified branding:** A key recommendation from the 2006 PEC Tourism Strategy was to adopt a common identifier and wordmark - 'The County' - to build awareness and a cohesive brand.

Tourism Napa Valley, currently uses 'Legendary Napa Valley' as their shared wordmark to position the destination to visitors and residents.

Hawke's Bay Tourism has used 'Get me to Hawke's Bay' tagline and brand since 2011.

6. **Be clear on who does what:** The efforts of municipal, regional, federal operators, associations, organizations and individuals contribute to the long-term success of a sustainable tourism destination. Clarity around who does what reduces duplication and uses available funds, energy, time and expertise in the most effective way. A key feature of regional tourism organizations more importantly, is what they *don't* do.

#### 4.7 DMMO Best Practice

The Thompson Okanagan Tourism Association (TOTA) proves that marketing-oriented DMOs can make a successful transition toward well-rounded destination management, and holistic stewardship of their destinations. They have pushed the conventional limits of a DMO without any major structural overhauls.

Founded in 1956, TOTA was organized and operated as a typical DMO with a primary focus on marketing for the Thompson Okanagan region, an important wine region. TOTA began to re-evaluate this model in 2011, and since then have evolved to become a leading model for successful destination stewardship. The first step in accomplishing this was the preparation of a Ten-Year Regional Tourism Strategy, guided by an advisory steering committee representing different stakeholder groups. Some of the key success factors are outlined below:

- TOTA's key message to industry was "the competition is not in the room or even down

the highway,” recognizing that the region is competing globally, and as such, they must all work together to not only market, but manage the region.

- TOTA, with Destination BC, hosts the Remarkable Experiences Program, designed to support BC tourism operators in developing and delivering outstanding, visitor-focused experiences.
- In 2017, TOTA successfully became an RTI “Biosphere Certified Destination” committed to continuous improvement in combating climate change, protecting the environment, and enhancing cultural, social and economic condition.
- TOTA has signed an MOU to undertake the role of Secretariat for the Okanagan Collaborative Conservation Program, whose mandate is to bring together and support 32 environmental agencies within the region.
- While TOTA claims there is no current concern for overcrowding, they are currently developing a visitor management system to create load capacity indicators.

TOTA a non-profit organization, governed with an elected Board of Directors comprising of 15 stakeholders, who represent the regional and community tourism industry.

TOTA’s base funding comes from the Destination British Columbia, with whom they have been in a formal funding partnership since 1995. In addition, the organization actively applies for provincial, federal, and corporate grants. TOTA has also formed joint funding partnerships with organizations such as go2HR (tourism human resources) and ITBC (Indigenous Tourism British Columbia) to jointly fund office positions for key projects.

With the change in direction in 2011 TOTA moved from a membership model to a stakeholder-based model. In the initial year they lost between \$100 to 200 thousand when they dropped membership fees and switched. To offset this loss, TOTA began charging an administrative fee on project and marketing initiatives. After TOTA removed the membership barrier to entry, this administrative fee has actually more than doubled funding, and they now have much broader industry buy-in.

#### **BEST PRACTICE: THOMPSON OKANAGAN TOURISM ASSOCIATION**

- TOTA is the subject of a case study for the Destination Stewardship Center in the US as one of a number of profiles of destination organizations that at least partially meet the Global Sustainable Tourism Council’s destination-management criterion.
- The Region was officially certified as the first destination in the Americas to successfully achieve the Sustainable Tourism Destination Accreditation from Biosphere International and the Responsible Tourism Institute.
- In 2018 TOTA was named the winner of the prestigious **Tourism for Tomorrow Destination Award** during the World Travel and Tourism Council Summit in Argentina.

## 5. Tourism Strategy and Action Plan

The Town of Lincoln Economic Development Strategy outlines two strategic tourism objectives:

3. To develop a Lincoln centred tourism strategy and action plan to provide needed infrastructure, expand capacity, increase visitor accommodations, and create memorable destinations, value and services to attract more visitors to Lincoln
4. To initiate action on local tourism-related needs that lend themselves to immediate action (i.e. seeking investment for accommodation and signature destination experiences, and wayfinding signage).

The recommended strategy and action plan follow.

### 5.1 Guiding Principles

**Recommendation #1** - THE TOWN OF LINCOLN ADOPT THE FOLLOWING SEVEN GUIDING PRINCIPLES IN DEVELOPING THE TOURISM SECTOR. THESE SEVEN GUIDING PRINCIPLES SHOULD ALSO PROVIDE THE FOUNDATION FOR THE REGIONAL DESTINATION STRATEGY AND ANNUAL PLANS.

The guiding vision for Lincoln is *to develop and grow the Lincoln tourism industry while adhering to the following guiding principles:*

1. **Maintain character of place:** Focus on tourism that sustains/enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents. That is the desired type of tourism for Lincoln and area. The opportunity is to make tourism a win-win for both residents and visitors.
2. **Collaboration:** Facilitate and enable full collaboration among all Lincoln and area tourism stakeholders in the private, public, non-government organization (NGO) and not-for-profit sectors. Collaboration with neighbouring municipalities, like St

Catharines and Grimsby could enable implementation of a substantial municipal accommodation (MAT) tax. Working together for the benefit of all and projecting a bigger voice into the market should be the motto.

3. **Soft boundaries:** Tourists do not see political boundaries, and it is critical in understanding the destination from the visitor's perspective. For Lincoln this means the destination encompasses adjacent rural/agricultural areas in municipalities including Grimsby, St Catharines, West Lincoln, Pelham when strategically appropriate, and from a visitor's lens.
4. **Yield over numbers:** Focus on the desired type and quality of visitors and visitor yield rather than pursuing mass tourism. The opportunity is to attract new visitors from growing markets and stimulate repeat visitation.
5. **Accountability:** Measuring, reporting and modifying products and visitor experience to achieve economic benefits. Making sure that all actions are measured and there is accountability for the resources used.
6. **Grow experiential tourism:** The opportunity in a destination like Lincoln with significant market ready products/services is to develop and market the experiences that will differentiate the destination. Creative visitor experience development can help to spread visitation year round.
7. **Sustainable tourism:** Safeguard the natural resources and the unique agrarian landscape and communities/lifestyle through visitor experiences that do no harm, and where possible, and contribute to the regeneration of damaged resources.

## 5.2 Strategic Approach

**Recommendation #2** – THE FOLLOWING VISION FOR TOURISM IN LINCOLN BE ADOPTED:

*The Lincoln centred destination offers visitors unique tourism experiences built around an award-winning artisanal beverage sector in a spectacular natural setting, targeted at high yield, small group and independent travellers sensitive to preserving the unique character of place.*

*Sustainable tourism, together with ecotourism/responsible tourism, forms the central spine running through the Lincoln tourism master plan. The two concepts are interconnected, but distinct. Tourism can have negative impacts on destinations by causing congestion at popular sites and Parks, or in the local transportation system, or tourism can result in environmental damage to sensitive ecosystems and sites, create resentment by locals, and damage archaeological and/or historic sites or features.*

All elements in the tourism supply chain need to become more sustainable. Today, sustainable tourism is no longer a choice. In this era, with global challenges such as climate change and overtourism, sustainable travel is imperative -- for the travel industry, travelling public, and host destinations. Therefore, **sustainability principles and best practices are to be incorporated - 'baked into' - all aspects of the Lincoln Tourism Master Plan.**

But the concept of ecotourism, or responsible tourism goes much further in destinations like Lincoln that have sensitive and attractive natural and cultural heritage resources. The principles of ecotourism/responsible tourism are really what is important, not the term itself. The three core principles that should apply to tourism that engages with the sensitive natural and cultural heritage features in Lincoln are as follows:

1. **The tourism activities should minimize negative environmental impacts**, and in fact strive to **create a net benefit** by regenerating or preserving the environmental features that are attracting the visitors in the first place (i.e. Niagara Escarpment and associated creeks and valleys, the Greenbelt, Lake Ontario shoreline and harbours).

2. **The focus should be on maximizing the benefits locally, minimizing economic leakage** that so often accompanies mass tourism, and helping to preserve the local cultural heritage (tangible and in tangible), and improving the livability in the destination.
3. **An emphasis should be placed on educating or at least creating heightened awareness with the visitors of the need to preserve the integrity of the places and communities they are visiting.**

Communities form the backdrop in any tourism destination, they provide needed support for tourism to survive, and they are often part of the reason visitors are attracted to a destination. Once a region has become a tourist destination, its local businesses and residents will inevitably be affected. This impact and the subsequent community reaction to tourism can differ greatly depending on how the community is involved in developing and managing their interaction with tourism, and how they benefit from tourism. In Lincoln it is recommended that the focus be placed on the residents as the Hosts inviting the travellers as Guests to visit.

Community identity and pride can be heightened through tourism. Visitors often travel long distances to see attractions in and experience the cultural and historical aspects of local areas that residents may simply take for granted. **The brand that is developed for the Lincoln centred destination must come from within and be supported by local residents and the tourism industry stakeholders. The organization and governance structure designed for the Lincoln centred destination should focus equally on management of the destination as on marketing the destination.**

Lincoln tourism (through TVTA) has largely relied on the strength of the wineries and other beverage producers and yet there is so much more that can actually help to differentiate this destination from the increasing range of beverage destinations in Ontario and upstate New York, and all over the world in fact. The Lincoln centred destination should extend out to incorporate the rural and agricultural areas bounded loosely by Lake Ontario, the two cities of Grimsby and St Catharines and back beyond the top of the Niagara Escarpment. **The intent should be to broaden the stakeholder base, both geographically and thematically, and**

**include the wide range of complementary attractions and services that can contribute to developing a unique range of compelling tourism experiences that define and differentiate the destination.** Stakeholders in the Town of Grimsby, City of St Catharines, and adjacent villages like Pelham should be invited to participate in this destination where it makes strategic sense. This Lincoln centred destination could potentially consider a municipal accommodation tax particularly if neighbouring municipalities like St Catharines and Grimsby participated. The approach then needs to be to broaden the constituent base and build the required funding support through collaboration, core Town of Lincoln support, results-based marketing expenditures, creative fund raising and leverage to create the scale of voice in the marketplace that will make a difference.

### 5.2.1 Evaluation and Prioritization Framework for Tourism Projects/Initiatives

**Recommendation #3** – THE TOWN OF LINCOLN DEVELOP AND ADOPT A FRAMEWORK FOR EVALUATING TOURISM PROJECTS, INVESTMENT AND INFRASTRUCTURE INITIATIVES TO ENSURE ALIGNMENT WITH THE TOURISM STRATEGY.

The tourism sector in the Lincoln is highly seasonal, and this is one of the primary factors constraining the growth of a healthy tourism sector. The industry is also highly dependent on day visitors and thus there is a need to focus on developing the supporting infrastructure and experiences to enable the pursuit of more beneficial overnight visitors.

In evaluating future tourism development proposals in the community, the Council and planning staff must recognize the need for new or expanded multi-seasonal attractions and experiences and the need for an expanded accommodation plant. The community needs to focus on the needs as a destination, and one of the key needs is the development of a diversified offer capitalizing on the unique cultural and natural heritage attributes, assets and stories that are truly unique to this destination. With increased tourism through the four seasons the existing accommodation plant needs to be expanded.

A healthy tourism industry is proven to be a major contributor to broader socio-economic development. An appealing tourism destination based on authentic sense of place (the

#### A Checklist to Evaluate and Prioritize Tourism Projects and Initiatives

Is it on strategy?

What is the impact on support infrastructure?

Does it compliment or interact with other attractors in the community? In the region?

Is it market-driven and financially sound?

Does the design:

- reflect the community? The environment?
- provide a point of differentiation?
- fit into scale, character and function of neighborhood?

Is there community support?

Does it expand seasonality?

Are risks outlined and understood?

geotourism concept) has a correlation with the destinations' residential and business attraction appeal. In this day and age, as many municipalities look to expand their creative class in order to grow their economy, tourism destinations offering an authentic and unique sense of place and diverse outdoor recreation opportunities like Lincoln have a better chance of success in this regard. One of the basic premises of Richard Florida's work on the creative class is that talented people are very mobile and are looking for interesting and authentic places to live where they can combine their profession with their lifestyle interests and passions. Developing the Lincoln centred destination into a viable year-round tourism destination will assist in strengthening the community's appeal to new residents, new businesses and will help to grow the creative class.

The following are recommended considerations to assist the Town in evaluating future tourism development and project proposals including those currently in consideration.

- New projects/initiatives should be on-strategy (with a focus on small groups, exploration of the destination, and considering capacity so as not to overload any areas within the destination) and aligned with the target markets identified in the strategy, as possible (culinary, agritourism, artisanal beverage tourism, cultural tourism, soft adventure and cycle tourism, wellness tourism and Indigenous tourism);
- It is critical with Indigenous tourism that the opportunities and proposals be driven by the Indigenous community – Indigenous tourism by and for Indigenous people;
- New attractions need to be added with careful consideration to the supporting tourist infrastructure needs such as public transportation, alternative transport, circulation patterns, maintaining critical viewsapes and protecting the existing agricultural and natural landscapes;
- Complementarity, or interaction with other attractions in the community and region is important;
- Any new project/initiative should be able to clearly demonstrate that it is market driven and financially feasible, based on sound market and financial feasibility research;



- Design should reflect the community and be sympathetic to the surrounding environment and provide a point of differentiation – in scale with the character and function of the area of the community;
- The proponents must be able to demonstrate community support for the development or project/initiative;
- Projects and initiatives that help to expand seasonality of the sector should have preference;
- Emphasis should be placed on creative and innovative projects and initiatives;
- Staff housing must be dealt with;
- Consideration must be demonstrated for the benefits to local residents;
- Incorporating programmable special event space open to the public, as possible; and
- Must demonstrate the level of risk to the Municipality and means to mitigate those risks.

The Town's resources for tourism are limited so there should be a strategic approach to prioritizing tourism opportunities and developments.

### 5.3 Roles and Responsibilities

**Recommendation #4** – THE TOWN OF LINCOLN TAKE THE LEAD IN DEVELOPING AND IMPLEMENTING THE TOURISM STRATEGY IN PARTNERSHIP WITH PRIVATE SECTOR STAKEHOLDERS, THROUGH A TOURISM STRATEGY IMPLEMENTATION TEAM.

**Recommendation #5** – THE DMMO STRUCTURE FOR THE LINCOLN CENTRED DESTINATION SHOULD FOCUS EQUALLY ON MANAGEMENT AS ON MARKETING, WITH A BROADENED STAKEHOLDER BASE CORRESPONDING WITH THE DESTINATION DEFINITION.

Up until this point the Town of Lincoln has been represented within the Twenty Valley Tourism Association (TVTA). It is clear that the TVTA approach has not been gaining full industry engagement and support, and the marketing impact has been limited due to insufficient resources, divided focus, and lack of brand clarity and strength.

There are many different models for Destination Marketing Organizations (DMO's), or for DMMO's (Destination Management and Marketing Organizations) as they are increasingly referred. There is no obvious best model and each destination needs to define the optimum approach given the organizations that can play a role in tourism destination marketing and management. This reality is brought to life from a review of a number of Ontario-based destinations included in Appendix B, each with different tourism marketing and management approaches. Each of the examples illustrate expenditures for tourism marketing and management in municipalities at differing stages of destination development. For example, Stratford with a well-developed destination spending close to \$1 million, compared to Brockville at a much earlier stage of development spending \$200,000 primarily for marketing (plus implementation of a MAT effectively doubling the fund), and then Prince Edward County spending \$400,000 for both management and marketing.

Many DMMO's are based on the membership model with collection of annual dues from members. Many others are non-membership, or stakeholder models where revenues are generated on a user pay basis for marketing and other programs. There are pros and cons to each of these approaches. In discussions with operators in Lincoln the membership fees combined with lack of accountability have been a deterrent for many. In the best practice case study of the Thompson Okanagan region the move to the stakeholder model both improved buy-in and participation from a broad range of operators and in the end increased revenues. The bottom line for tourism businesses to participate in DMMO's is the return they can gain on their investment through increases in business or business leads. The feedback from tourism stakeholders in Lincoln would suggest that many operators do not participate in the current DMO as they do not see the value and corresponding benefits from the required investment.

**The most successful DMMO's are those that draw on the collaborative strengths of both the public and private sectors.** Those destinations in Ontario with substantial commercial accommodation bases are increasingly turning to Destination Marketing Fees or Municipal Accommodation Taxes to help fund their activities. This is a weakness for the Town of Lincoln, suggesting the Town has to be creative in generating revenues in different ways. However, the lack of a MAT also represents a competitive cost advantage for accommodation operators in Lincoln.

Key features of the strategic approach for leadership in the Lincoln centred destination as described earlier provide important guiding themes for optimum roles and responsibilities:

1. The organization and governance structure designed for the Lincoln centred destination should focus equally on management of the destination as on marketing the destination.
2. The intent should be to broaden the stakeholder base, both geographically and thematically, and include the wide range of complementary attractions and services that can contribute to developing a unique range of compelling tourism experiences that define and differentiate the destination.

A third underlying premise is that activities and initiatives will be completed in partnerships wherever possible. This approach extends reach and stretches and expands available expertise. And finally, roles and responsibilities going forward honour the investments and efforts of industry while adding value and filling gaps in destination marketing and management.

#### **Building Town staff Tourism Capacity and Expertise**

- Join and be active in Tourism Industry Association of Ontario (TIAO).
- Monitor, access news, resources, events:
  - Tourism Industry Association of Canada (TIAC) resources, research, materials.
  - Tourism-focused sessions at Economic Developers of Ontario
  - Culinary Tourism Alliance
  - OTEC
  - Farm Management Canada

### 5.3.1 Adopt a private sector/public sector model to implement the Tourism Strategy

**Recommendation #6** – THE TOWN OF LINCOLN TAKE THE LEAD IN ESTABLISHING A PRIVATE-PUBLIC PARTNERSHIP MODEL FOR THE DMMO AND ASSEMBLE A TOURISM STRATEGY IMPLEMENTATION TEAM TO ADVISE AND ASSIST.

A partnered public sector/private sector approach is recommended to implement this tourism strategy and was voiced as the preferred option by many participants at the September 4<sup>th</sup> 2019 industry meeting and throughout consultations and conversations. More importantly, the recommended approach, roles and responsibilities identified below, will provide the best structure to implement this strategy and to support a strong tourism economy in the region. It is anticipated that as the operating and marketing environments shift for both the destination and the province, that formal and informal structures that drive tourism in the Lincoln centred destination may change (i.e. the current RTO structure). Key features and benefits follow.

Stakeholder buy-in, front-line intelligence and support:

- implementation and guidance provided by a newly established Tourism Strategy Implementation Team (TSIT); note that this team may evolve into the recommended Tourism Advisory Team;
- opportunities to create one-time task forces to guide elements of the action plan – for example the branding and marketing plan; and
- a forum to bring together diverse stakeholders.

Marketing and visitor-facing activities led by industry:

- are most effective led by industry who are on the front-line delivering tourism experiences, providing not only timely insights to what is happening on the ground, but who bring their own marketing expertise, stakeholders and relationships to the table;

<b>TOURISM STRATEGY</b> (Implementation guided by Tourism Strategy Implementation Team) <b>Defining and Branding the Destination</b> <b>Marketing Plan</b> <b>Festival and Events Plan</b>	
<b>TOWN-LED FUNCTIONS</b>	<b>TOURISM MARKETING ORGANIZATION-LED FUNCTIONS</b>
Strategic Coordination	Targeted Marketing Strategy
Community Engagement	
Festival and Events	Market Readiness and Experience Development
Infrastructure Attraction	Visitor Information Services
Tourism Friendly Downtowns	
Accountability Research	
Visitor Information Services-Gateway/Wayfinding Signage	

- must have flexibility to respond to visitors and the market in a timely manner, particularly on social media; and
- must support the strategic direction for the destination but not be hampered by political boundaries and bureaucratic processes.

Retention and realignment of an existing not-for-profit organization (Lincoln-centred DMO) provides the destination with:

- an entity that can access various financial resources and in-kind partnerships to the benefit of the destination that public sector organization cannot; of particular importance to the Lincoln centred destination should a MAT be introduced, as 50% of funds collected must go to a not-for-profit agency in support of tourism marketing;
- flexibility to carry forward financial planning from one fiscal year to the next, which in turn facilitates better planning and execution;
- an operating structure that allows for and supports contract services, thereby offering flexibility to gear up or gear down as needed; and
- capacity to partner strategically.

Town-led functions provide the destination with:

- synergies across related departments that include, for example, culture, planning, public works, transportation and communications;
- a tourism voice (through staff and a newly formed Tourism Advisory Team) at the municipal level economic development table to support a whole-of-destination approach; and
- opportunities to partner municipality to municipality.

Key factors to success are:

- a shared direction;
- support for and buy-in from those who deliver visitor experiences, facilitated by an open and frank conversations and sharing;

#### **Tourism Strategy Implementation Team Guidelines for Composition**

*NOTE: The Implementation Team may transition into the Advisory Team, a stakeholder-based forum for sharing insights and building action plans.*

- Core leadership group to drive and guide implementation: 5 to 8 industry stakeholders plus 2 from Town staff; 1 from TVTA; MTCSHI representative.
- Sub-committee to guide destination branding initiative and marketing plan: 3 from core group, supplemented by 3 additional members to extend reach and engagement of stakeholders.
- Sub-committee to complete festival and events review: 3 from core group, supplemented by 3 additional members to extend reach and engagement of stakeholders.

- flexibility as market conditions shift, successes are celebrated, new challenges arise.

**Recommendation #7 – TOWN OF LINCOLN PROVIDE A DEDICATED STAFF PERSON TO FULFILL THE LEAD ROLE IN IMPLEMENTING THE TOURISM STRATEGY**

Hiring a new staff person to lead the Tourism Strategy implementation will be an important first step. It will take someone with strong tourism industry knowledge and experience to lead the Town's efforts in this regard. As leader in one of the four key economic pillars for Lincoln's future tourism economy this staff person will, following implementation of the Strategy, fulfill the role as major partner in the new Tourism Marketing Organization, and will continue to lead the Town's efforts in all Town DMMO functions.

### 5.3.2 Implement a hybrid funding model

**Recommendation #8 – A NEWLY RECONSTRUCTED TOURISM MARKETING ORGANIZATION MOVE TO A HYBRID STAKEHOLDER/MEMBERSHIP MODEL VS. THE OLD MEMBERSHIP MODEL.**

Destination marketing is undergoing a revolutionary change. Historically DMO's have focussed on reaching potential visitors through advertising. Today, word-of-mouth promotion has moved to the forefront for DMMO's. An increasing focus on inbound marketing through social media and online networks, with existing visitors influencing large numbers of potential visitors requires less dollars spent on media, and the audience becomes a managed asset, managed and maintained by the DMMO. The objective should be to grow relationships with enough visitors to influence an increasingly large number of new visitors to decide to visit. Existing visitors are the most effective marketers of the destination.

The other major evolution for DMMO's is they are beginning to manage experiences not only to improve visitor experience, but also to ensure an improved quality of life for residents. To be able to create unique and appealing experiences, a DMMO needs to work on the development of the product within the destination and create product experiences that first, build from the destination's competitive advantages and assets, second, meets high standards

**A refreshed and realigned Lincoln centred Tourism Marketing Organization**

- With a broader member base, both geographically and thematically;
- Led by skills-based Board of Directors following governance best practices;
- Active in a narrow and well-defined role;
- Performance measured through established metrics;
- Provides members with deep and current expertise in digital marketing tactics specific to tourism in particular; and
- With an operating name that reflects the new destination brand.

for quality, and thirdly, are tailored/targeted to certain markets or market segments. To make this happen the DMMO needs to work closely with the diverse range of tourism stakeholders responsible for delivering these experiences, a much more diverse range of stakeholders than has been engaged in the past. The new Tourism Marketing Organization will need to determine how best to play the lead role in shaping the destination, and in developing and implementing programs for marketing, education and training that provide clear and demonstrable value to operators.

A key shift for the refreshed Lincoln centred DMMO in support of the Vision will be to represent and provide tangible value to a broader base of operators, partners and communities, both geographically and thematically. To do this, the organization must embrace, at least in part, a benefits-based stakeholder approach, supported by a well-designed and executed marketing plan that adds value, backed up by timely reporting of results. A focused marketing plan that adds value, provides the Lincoln centred DMO to actively pursue strategic marketing and destination management partnerships.

As noted, previously, the Lincoln destination may not be in a position to immediately benefit from the implementation of a Municipal Accommodation Tax (MAT) and therefore must plan for and embrace financial stability through:

- a reduced membership fee for core (basic) services to help engage a broader more diverse range of stakeholder within the broader geographic area (i.e. listing on the destination database on the website);
- a menu of compelling marketing and project (education, training) initiatives and programs; with clearly defined benefits, registration is on-line, with one window for payment and participation, with an administration percentage going to the Marketing Organization;
- formal funding partnerships and multi-year investments from area communities that include Lincoln, West Lincoln, Pelham, Grimsby and St. Catharines;
- grants and partnerships (financial, in-kind) in support of marketing, product development and visitor services activities; and
- sponsorships.

#### **Programs, Grants, Partnerships to monitor and pursue as appropriate**

##### *Provincial Government (many under review)*

- Ontario Rural Economic Development
- Celebrate Ontario
- Southwestern Ontario Development Fund
- Tourism Development Fund
- Skills Catalyst Fund
- Summer Experience Fund

##### *Federal*

- Canadian Experiences Fund
- Federal works programs
- Summer student and intern programs

Successful transition to a hybrid membership/stakeholder model will require leadership from a cross-section of industry champions to spread the word, frequent updates to industry and partners, patience and a clear plan that all are committed to implementing. This transition is best initiated once the destination branding and marketing plan are underway or completed so that stakeholders see what the path forward is and what they are investing in.

Some of the potential partner organizations are listed below under the two major functional areas of marketing and destination management.

### Sample Stakeholder Approaches

Thompson Okanagan Tourism Authority:

- Free stakeholder registration (pre-qualified) and web listing
- Optional Co-op partnerships in three destination level consumer marketing destination-level initiatives, each with their own goals, tactics, target markets, etc.:
  - *Thompson Okanagan* to promote responsible travel
  - *BC Trails* to increase rail trail awareness in the spring, fall, and winter seasons, connecting communities through the various pathways throughout the region.
  - *Route 97* is a touring and exploring campaign that showcases the Thompson Okanagan and North Central Washington through a series of road trips.

Hawke's Bay, New Zealand Tourism:

- Web listing: \$100
- Tourism Membership: \$300
- Support Partner: \$300
- International Marketing Group: \$500

Niagara on the Lake Chamber of Commerce:

- Full Membership: \$225
- Associate Membership: \$125
- Optional additional web category listing: \$75 per
- Booking services \$75



Potential Marketing Partners	Potential Destination Management Partners
<p>Destination Canada</p> <p>Destination Ontario</p> <p>Tourism Partnership Niagara</p> <p>Niagara DMO's</p> <ul style="list-style-type: none"> <li>• Twenty Valley Tourism Association</li> <li>• Niagara Falls Tourism</li> <li>• Tourism Niagara-on-the-Lake</li> <li>• St Catharines Department of Economic Development &amp; Tourism</li> <li>• Niagara's South Coast Tourism Association</li> </ul> <p>Tourism Operators – both within and around the Town of Lincoln</p> <ul style="list-style-type: none"> <li>• Accommodation operators</li> <li>• Beverage attractions</li> <li>• Culinary &amp; agritourism attractions/operators</li> <li>• Nature &amp; outdoors operators/attractions</li> <li>• Tourism events</li> <li>• Arts &amp; cultural heritage attractions</li> <li>• Other attractions (golf courses, entertainment)</li> <li>• Local tour &amp; transportation operators</li> </ul> <p>Tourism Sector Organizations</p> <ul style="list-style-type: none"> <li>• Wine Marketing Association</li> <li>• Greenbelt</li> <li>• Attractions Ontario</li> <li>• Ontario Culinary Tourism Alliance</li> <li>• Niagara Peninsula Conservation Authority</li> <li>• Niagara Gateway Information Centre</li> </ul> <p>Surrounding Municipalities</p> <ul style="list-style-type: none"> <li>• Grimsby</li> <li>• West Lincoln</li> <li>• Pelham</li> <li>• Thorold</li> </ul>	<p>Ontario Ministries</p> <ul style="list-style-type: none"> <li>• Tourism, Culture and Sport, Heritage</li> <li>• Agriculture and Rural Affairs</li> <li>• Economic Development, Job Creation and Trade</li> <li>• Environment, Conservation and Parks</li> <li>• Indigenous Affairs</li> <li>• Transportation</li> </ul> <p>Regional Municipality of Niagara</p> <p>Local BIA's and Merchant Associations</p> <p>Economic Development Council of Ontario</p> <p>Local/Regional Economic Development Organizations</p> <ul style="list-style-type: none"> <li>• Lincoln Chamber of Commerce</li> </ul> <p>Ontario Tourism Education Council</p> <p>Academic/Research Institutions active in tourism</p> <ul style="list-style-type: none"> <li>• Brock University</li> <li>• Niagara College</li> <li>• Vineland Research Centre</li> </ul> <p>Local Special Interest Groups</p> <ul style="list-style-type: none"> <li>• Cycling Clubs</li> <li>• Heritage Lincoln</li> <li>• Niagara Friendship Centres</li> <li>• Sport tourism interests</li> </ul> <p>Regional Designation Organizations</p> <ul style="list-style-type: none"> <li>• Ohnia:kara Aspiring Geopark (once approved)</li> <li>• Niagara Escarpment Biosphere Reserve</li> <li>• Bruce Trail Association</li> </ul>

## 5.4 Strategic Directions

Nine key areas of activity to successfully implement this five-year strategic plan have been identified and include:

1. Defining and Branding the Destination
2. A Targeted Marketing Plan
3. Visitor Information Services
4. Festivals and Events
5. Accountability Research
6. Market Readiness and Experience Development
7. Investment Attraction
8. Supporting Infrastructure
9. Tourism Friendly Downtowns

Specific recommendations under each strategic direction are outlined below, followed by a detailed action plan in the section that follows.



### 5.4.1 Defining and Branding the Destination

**Recommendation #9** – THE TOWN OF LINCOLN, WITH GUIDANCE FROM THE TOURISM STRATEGY IMPLEMENTATION TEAM, PREPARE THE TERMS OF REFERENCE AND ISSUE RFP FOR A BRANDING SPECIALIST TO DEVELOP A NEW BRAND FOR THE DESTINATION.

The key defining features of the destination, of which Lincoln is part are the rural agrarian landscapes framed and/or crossed by the Niagara Escarpment and Lake Ontario shoreline. The benches are a key differentiating feature for this particular part of Niagara.

A brand is far more than just an ad campaign, a new logo or the region's name. It must reflect the whole promise being made to visitors.

- The compelling regional story;
- Differentiated from other destinations like Niagara-on-the-Lake and Prince Edward County;
- Compelling to visitors; and
- Conveyed with local pride.

Destinations International strongly suggests a destination's brand must come from within and be supported locally.

The destination is not clear for visitors. The Wine Marketing Association (WMA) identifies the destination as the Niagara Escarpment and Twenty Valley. TVTA positions the region from Grimsby to St Catharines as Twenty Valley. The Town is not what one would envision as a Town, it is more like a County with multiple villages. Some operators position themselves in Beamsville or on the Beamsville Bench, and others in Jordan Village. Other tourism marketing organizations define the destination in different and as a result, confusing ways (i.e. the Ontario Culinary Tourism Alliance).

#### Public Survey Branding Ideas

- Doorway to Niagara
- Hidden Gem
- Wine Capital of Ontario/Wine Stem/Wine Country
- Gateway to Wine Country
- Agricultural Tourism
- Lincoln Bench
- The Bench
- Lincoln/Lincoln County/Township of Lincoln
- Agriculture, Cycling & Nature
- Wine & Fruit
- A Place to Grow
- Wine & Culinary
- Wine & Waterfront

There are three phases that need to be undertaken to establish a clear and compelling destination for visitors and to create a destination brand that operators, residents and stakeholders will be proud to showcase:

1. Development of the brand led by experienced tourism brand development professionals (refer to Sample Scope of Work in Appendix B);
2. Introduction, use and control of brand guidelines by the industry and stakeholders; and
3. Positioning the brand in target markets through marketing tactics, visitor information services, gateway and wayfinding initiatives.

#### 5.4.2 Delivering a Targeted Marketing Strategy

**Recommendation #10** – THE TOWN OF LINCOLN, WITH GUIDANCE FROM THE TOURISM STRATEGY IMPLEMENTATION TEAM, PREPARE THE TERMS OF REFERENCE AND ISSUE RFP FOR A MARKETING AND COMMUNICATIONS SPECIALIST TO DEVELOP A 3-YEAR MARKETING PLAN FOR THE DESTINATION TO BE DELIVERED BY THE TOURISM MARKETING ORGANIZATION.

The area is generally doing well in touring markets from Hamilton & GTA and has a strong fall season. A new destination-level marketing strategy and plan will provide a shared road map to reach high yield small group and independent travellers and to build visitation at weaker times of year, and days of week.

Specific goals include:

- Shift visits away from weekends during peak summer and fall weekends;
- Keep visitors in the destination longer and stimulate repeat visitation;
- Increase visits between November and April; and
- Attract new types of visitors from growth markets.

These goals will be achieved by targeting visitors seeking the following types of experiences:

- Culinary;
- Agritourism;
- Wellness;
- Soft adventure (cycling, paddle sports, walking/hiking); and
- Festivals & events.

TVTA, the lead tourism marketing organization in the Lincoln destination to date, has initiated shifts in its activities to embrace digital tactics, to sell the broader destination and to telling the stories unique to the destination. These shifts are on track and need to continue, with additional efforts in support of the Vision, as outlined.

Established individual wineries, craft breweries and distillers in particular, generally do well attracting visitors with their own on-site tours, activities and events. The marketing opportunity for the Lincoln destination is to add value, targeting times and visitors that individual operators, communities and events cannot achieve on their own.

**Retain outside services to develop a rolling 3-year marketing plan in support of this Tourism Strategy and its stated Vision for the destination.** Key objectives of the marketing plan to add value include:

- Adopting a digital first approach;
- Providing smaller operations not active in tourism, venues and opportunities to get in front of consumers off-site;
- Featuring reasons and inspiration to visit at non-peak times through itineraries, blog posts, e-newsletters (segmented by interest);
- Positioning existing products and experiences in front of new consumers and decision-makers on special interest and niche platforms, including incentive planners, corporate retreats and social group organizers and influencers (girls' getaways, reunions, book or photography club retreats; wine clubs);
- Generating unpaid media and influencer coverage to establish and build the destination brand;

- Identifying tactics to amplify and showcase existing site-specific offers or activities, traditional and unusual, that include for example:
  - Featherstone Estate Winery: *Hawk Talk*
  - Foreign Affairs: *Picnic Lunch for Two*
  - Vineland Estates: *DIY Creative Series* such as *Knitting 101*
  - Westcott Estates: *The Pinot Affair Winemakers Dinner*

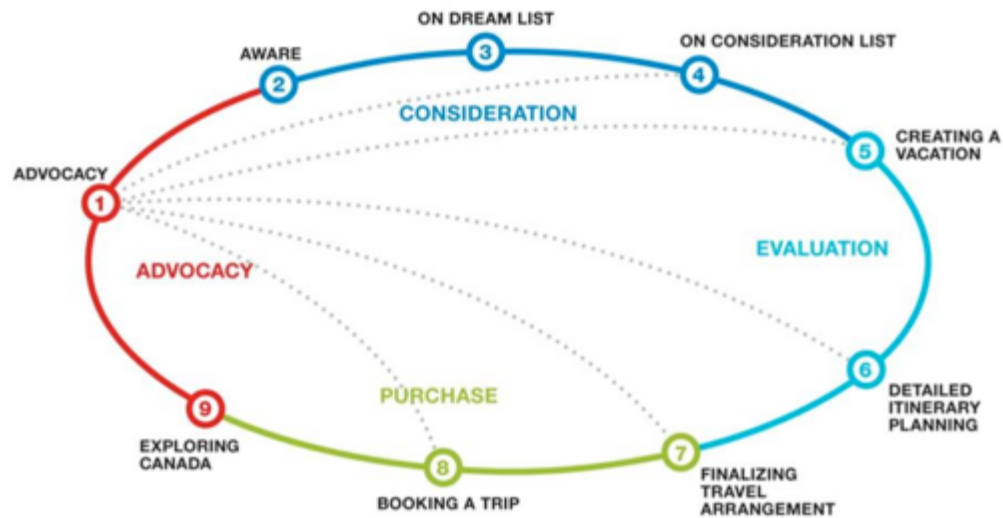
To be delivered by the Tourism Marketing Organization, the marketing plan must include specific and measurable goals and should be completed by the same third party retained for the branding exercise.

#### 5.4.3 Visitor Information Services

**Recommendation #11** – THE NEWLY RESTRUCTURED TOURISM MARKETING ORGANIZATION MOVE TOWARDS A DIGITAL VISITOR SERVICES MODEL.

Technology is disrupting all aspects of tourism marketing, including visitor servicing. In the past, consumers relied on DMO information sources such as guidebooks and visitor centres. But today travellers can access an infinite amount of destination information online and make bookings in their own home or on the go without ever having to step into a visitor or booking centre. According to Destination Think, the blog for the global DMO community around the world, visitor numbers are dropping in visitor centres, while traveller's expectations have shifted.

Of course, every situation is different and in some situations visitor centres still make sense in situations where enabling travellers to talk to a visitor counsellor is important. DMMO's definitely need to identify where in the visitor's journey (or the path to purchase as illustrated in the following diagram from Destination Canada) talking to the visitor might make sense. In the case of the Niagara Region there are a number of Ontario Visitor Information Centres at strategic locations and in the case of Lincoln there is the Niagara Gateway Information Centre in Grimsby. Within the Town boundaries there is also the Ball's Falls Centre for Conservation, an interpretive and information centre.



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#### Visitor Services where the Visitors Are

- At existing attractions
- At major tourism events
- By creating apps
- With portable visitor centre modules/ambassadors
- In existing gateway centres

physical centres. An increasing number of DMMO's are finding success in moving away from bricks and mortar centres by moving towards the following models:

- Transitioning existing visitor centres to traveller's lounges with coffee and wifi in order to attract more visitors;
- Using technology to create self-service models and reducing staff costs or by developing mobile or portable visitor centres which can be taken on the road throughout the destination;
- Moving the visitor centre to an existing attraction to be closer to in-market travellers;
- Turning the visitor centre into an experience itself like the Nashville CVB centre that hosts musicians to help travellers experience the city's music; and
- Creating apps that travellers use within the destination.

Today's DMMO needs to become a resource for businesses, a trusted source for information on modern marketing tactics, customer service techniques and experience development opportunities.

The key for Lincoln is to look at the path to purchase journey for visitors and identify the roadblocks or challenges where and how they can best assist through personal touch and then stay on top of the fast evolving digital marketing scene which provides the opportunity to use visitors to share their experiences from travels in the destination to market to future potential visitors.

Another potential application for technology would be to come up with technological solutions to the local taxi/Uber shortage.

#### 5.4.4 Festivals and Events

**Recommendation #12** – THE TOWN OF LINCOLN DEVELOP A POLICY FOR SUPPORTING TOURISM EVENTS BASED ON A STRATEGIC EVENT CALENDAR TARGETING EVENTS THAT CAN CLEARLY DEMONSTRATE TOURISM IMPACTS/BENEFITS.

There are a number of established tourism-focused events in the Lincoln area, with some presence in established Niagara events, primarily focused on wineries. To generate more and new festival and event-based visits going forward, the destination must broaden the reach and location of festivals and events beyond wine and related activities.

**1. Maintain robust tourism-focused festival and event calendar to drive visits when the destination would benefit most.**

- Maintain and track annual calendar of major festivals and events to position those planned for the Lincoln-centred destination at strategic times to avoid conflicts or to fill gaps.
- Working with Tourism Advisory Team (or sub-Committee):
  - review and prioritize existing tourism events to ensure alignment with tourism strategy, and financial sustainability;





- establish clear guidelines for community events versus tourism events in order to manage expectations and stay on strategy;
- identify opportunities for new destination-wide tourism events for development to achieve goals that may include:
  - Annual or bi-annual business to business (B2B) industry event that ties together the economic pillars of the destination, attracts high quality participants that are influencers in their own right to build credibility and aura of excellence and exclusivity; and
  - An arts-based event or competition with a consumer component at the end. For example, inviting local artists of many mediums (music, poetry, photography, painting) to interpret what they see in the benches of the area, working at a range of venues. The event would finish with unveiling of works to consumers at a shared celebration or tour featuring local food, beverage and venues. Hosted outside peak season, this type of event would drive new visits and appeal to new types of visitors.

## 2. Facilitate effective execution and delivery of tourism-focused festivals and events.

Well-run, profitable and sustainable festivals and events take time, specialized expertise and sound marketing. This responsibility for execution of major tourism events currently offered by TVTA is best shifted away from the newly focused Lincoln-centred DMO to the private sector with Town support (i.e. financial, staff or use of facilities/venues), so that the DMO can focus on their primary role to market the destination. How and when this shift in role happens will require planning to ensure smooth transition.

On the Town side, the best approach will likely be to engage outside expertise, specific to each tourism event as required. Some existing events, such as Graze the Bench, Love the Bench and Ball's Falls Thanksgiving Festival may not need direct support but should be included in overall planning considerations. Community-focused events, such as the Pumpkin Parade, should remain with the BIA.

### A robust and sustainable annual events calendar is best developed:

- To showcase local stories, passions and assets unique to the destination;
- To provide visitors with an experience not readily available elsewhere (for example emerging writers/authors festival, international choral competition or youth-focused event);
- Working in close cooperation with host organizations and area residents (to minimize volunteer burnout);
- Co-ordinated with operators to attract visitors when the region has the capacity to support and to eliminate hosting a number of events during the same period;
- Planned with an eye to accessing talent (musicians, artists, chefs, writers) to ensure their availability;
- Sun-setting or discontinuing events when they have run their course; and
- Managing the volume of visitors to ensure each event stays true to its goals and ability to deliver.

Current Annual Calendar of Tourism Focused Events Lincoln-Centred Destination			
Date	Event	Theme	Location
January one weekend 11-13, 2019	Winter Winefest	Food, wine, craft beverages, competitions, after-parties, exclusive dining; live entertainment, fashion; 10 <sup>th</sup> year (2019)	Primarily Jordan Village
February (2 weekends)	Love the Bench	Food and wine experiences; individual tickets from each location	7 VQA vineyards in the Beamsville Bench
April (2 weekends)	Get Fresh in the Valley	Self-guided tours for wine and food pairings	17 wineries
June (1 weekend)	Graze the Bench	VIP passes for wine, food, live music; 10 <sup>th</sup> year (2019)	7 VQA vineyards in the Beamsville Bench
October (Thanksgiving weekend)	Ball's Falls Thanksgiving Festival	Artisans, live entertainment, food, wine & craft beer; farmers market; 45 <sup>th</sup> year in 2019	Ball's Falls Conservation Area
November (3 weekends)	Wrapped Up in the Valley	Wine and food pairings; digital recipe book	19 wineries on the Escarpment

### 5.4.5 Accountability Research

**Recommendation #13** – THE TOWN OF LINCOLN SEEK A PARTNERSHIP WITH LOCAL ACADEMIC INSTITUTIONS TO DEVELOP A ROBUST ACCOUNTABILITY RESEARCH PROGRAM WITH A WELL-ESTABLISHED BASELINE RESEARCH PROFILE.

There is little in the way of research on tourism in Lincoln.

There are three components to an accountability research program:

1. Collection of regular visitor statistics from attractions, events and accommodation operators;
2. Destination development effectiveness monitoring for experience/product development, capacity building, tourism event development and marketing projects; and
3. Reporting back to the industry – Industry Market Intelligence Reports.

There is a need to work with the area accommodation and attraction (wineries, breweries, distillers, Conservation Areas etc.) operators to develop and implement a visitor-tracking program to generate timely, relevant data for tourism planning and marketing decisions. The current lack of useful data specific to the Lincoln area is a hurdle to development as a viable destination.

Any successful destination planning, product development, and/or marketing initiative needs market intelligence to:

- Create recognized benchmarks and baseline measurements;
- Provide means to accurately compare performance;
- Capture valuable information about which tactics are effective;
- Aid in decision making when allocating budgets;
- Aid in decision making when developing campaigns;
- Identify “need areas” for product development, training, and education; and

- Provide a platform to articulate tourism's contribution to the local economies.

Individual operators throughout the region also benefit from market intelligence about the region. Such information assists them in their business planning and longer-term strategic planning. An ongoing program for collecting visitor statistics should use standard templates for:

- Accommodation operators including hotels, Inns, B&B's, AirBnb's and campgrounds;
- Key attractions (wineries, breweries, distillers, CA's etc.) and
- Event operators.

Key characteristics of the program should include:

- Data collection templates that are simple and easy to use;
- Templates distributed and collected bi-monthly as well as during events with reporting immediately thereafter;
- Distribution of templates to accommodation and attraction operators (the incentive for operators to participate will be the consolidated results report that is emailed back to all participants); email reminder to establishments to send info via email (or telephone info) at the end of each month;
- The incentive to event operators would be to prove tourism benefits and secure support from the Town;
- Collection of the following types of data:
  - Number of visitors/arrivals /overnight guests;
  - Guest origin (by approximate or accurate proportion)
  - Average length of stay

An exit survey to assess visitor satisfaction and activities while in the region would also be a valuable tool. This should be a one-page (maximum) survey distributed through tourism operators or by students at strategic locations. Data collected through this type of survey should include:

- Demographics: Origin, age, party composition;

- Visitor Satisfaction: with accommodations, meals/cuisine, rate satisfaction levels (Likert scale 1-5) and list two trip highlights;
- Activity/Experience Participation: which attractions, activities/experiences participated (circle from a regional list of key attractions, activities, festivals, events and satisfaction levels with experiences participated in. List two trip highlights; and
- Other possible questions (space permitting) on their overall spending and impressions of their visit.

Once there is solid annual visitation data the provincial TREIM (Ontario's Tourism Regional Economic Impact Model) economic impact model can be utilized to quantify the economic benefits of the tourism efforts.

The exit survey and the TREIM modelling can then be implemented on an annual or bi-annual basis.

Regular reports should be maintained on the progress with all experience development initiatives, tourism event development initiatives, capacity building initiatives and marketing projects. These regular reports would serve as part of the regular updates required by the Team.

An industry market intelligence report could then be developed. This would be a consolidation of industry statistics collected and other useful market insights that are disseminated to operators bi-monthly. Essentially a newsletter but positioned as a "must read". There may also be a monthly newsletter that includes other material of interest to operators but not including the research, which only need be sent out bi-monthly. All tourism stakeholders in the Lincoln area should be on the distribution list.

The information could also include insights from other source such as:

- RTO 2 (TPN) and Niagara Region Tourism information;
- Useful provincial data or report summaries;
- Upcoming events, conferences, tours etc., and
- New tourism development initiatives in the region.

A case study on how important good data is and how Banff/Lake Louise used data to help resolve their seasonal overtourism issues and spread/disperse visitation is outlined in the text box.

#### **The Value of Good Data: A case study from Banff/Lake Louise**

The key to the success of the park was efficiently dispersing traffic upon entry during peak season, in addition to influencing visitor behaviour. Visitors are encouraged to explore the park by foot and to enjoy a car-free experience to really make the most of what the park has to offer. Not only does this reduce the vehicle footprint, it enhances the visitor experience as they are able to immerse themselves in nature and freely explore the park. This would be a much more memorable experience rather than driving around the park.

Banff & Lake Louise implemented a conversion pixelling strategy in order to better understand the visitor and to be able to measure the quality of leads received from different channels. This works by adding a snippet of code to relevant web pages, to then successfully track the conversion path, whether that is booking, signing up or clicking to another page to find out more.

From this, the DMO gains valuable data insights into what geo markets are actually booking and where destination visitors are coming from. In addition to that, the data gives further insight into key differences between primary markets, for example how booking windows and decision-making vary from market to market. This valuable data effectively allows the DMO to learn exactly when to develop and place relevant content to each specific market based on their booking window. It also discovered that 42% of conversions were coming from the primary markets (The US and Canada) in which they were already actively marketing.

Conversion pixelling is a fairly low-cost resource however the return is almost invaluable. These data insights are highly valuable and instrumental when it comes to developing content, shaping marketing strategies and understanding your visitors.

Source: Digital Tourism Think Tank, Launchpad Insights newsletter (October 22, 2019)

#### 5.4.6 Market Readiness and Experience Development

**Recommendation #14** – THE NEW TOURISM MARKETING ORGANIZATION DEVELOP A PROGRAM FOR MARKET READINESS AND EXPERIENCE DEVELOPMENT TRAINING AND PROGRAMMING FOR LOCAL OPERATORS.

The ultimate goal of investment into product quality and visitor experience development is to provide visitors with new and more reasons to visit. There are two streams to invest in:

- *Market readiness* so that operations are providing the quality and services that targeted markets are expecting; and
- *Experience development* to improve, enhance and expand things to see and do.

Being 'market ready' means that operations are ready to welcome and serve visitors. For farms, wineries, horticultural operations and many heritage attractions, their focus may be their primary business. To serve visitors, they need accessible washrooms, sufficient parking and all relevant licenses in place to name a few. There are a number of existing market readiness tools, workshops and resources that support Lincoln's strategic focus to connect the industry to.

Done strategically and coupled with timely targeted marketing tactics, new and refreshed experiences play a key role in shifting visits to when the destination benefits most, to keeping visitors in the destination longer and to attracting new types of visitors. Immersive experiences that command a higher per person prices also provide operators with higher yield per visitor to their bottom line. Experiences represent a new layer of opportunity for the destination. Most vineyards, for example, offer tasting rooms, providing a service to help sell their products. An experience such as combining a guided hike on the Bruce Trail with visits to a number of vineyards help to target new visitors yielding more economic value to the destination.

Operators have expressed interest in shifting visits away from weekends during peak seasons (summer, fall), into mid-week, as well as driving visits between November and April.

The focus in Lincoln should be on tourism experience development. This can be achieved by leveraging the regions' unique natural and cultural heritage and attractions/stories and existing infrastructure and activities to build higher differentiation, higher yield experience offerings and creating and delivering more people and program-based brand experiences. These experience offerings should focus on target markets. People and program-based experiences are those that offer deep engagement with locals and an understanding of the character of the people and places they visit.

Experience development done well showcases lesser-known stories, features and personalities and provide new reasons for coverage by travel media and influencers that in turn builds profile and awareness of the destination as a whole.

To be most effective and to support the strategy, experience development in the Lincoln-centred destination must:

- Design experiences to appeal to the target markets – culinary, agritourism, wellness, and soft adventure;
- Ideally be scheduled to generate visits during mid-week (peak season) and during other need times that include November to April; and
- honour the commitment and vision to appeal to small group and FIT travel.

Two major areas of effort, to be delivered by the newly renewed Tourism Marketing Organization are outlined below.

- 1. Improve, enhance market readiness and quality of visitor experience** through the delivery of and access to resources, training and peer-to-peer professional development.
- 2. Diversify visitor offers and experiences to appeal to target markets.**
  - Facilitate inclusion of the destination's qualified operators to existing market-specific visitor initiatives such as Ontario's Beverage Discovery Routes, cycling and hiking itineraries.



- Create series of new, themed itineraries (driving, cycling, hiking) to appeal to range of visitors and presenting the destination in new and unexpected combinations. For example:
  - *Exploring Lincoln in the off-season* appealing to adventurous travelers who explore in non-peak seasons and times (mid-week).
  - *'Going Green in the Greenbelt'* featuring sustainable beverages, beer, eats and treats.
  - *Before and After Tasting Hikes and Bikes* profiling 1 to 2-hour activities to participate in when the tasting is done.
- Facilitate development of unique high end, small group experiences that showcase the unique stories, personalities, and landscapes of the destination:
  - At least one new Ontario Signature Experience annually;
  - At least one Canadian Signature Experience annually, and
  - a series of new experiences in unexpected combinations.

#### 5.4.7 Investment Attraction

**Recommendation #15** – THE TOWN OF LINCOLN DEVELOP A PROACTIVE TOURISM INVESTMENT ATTRACTION PROGRAM, INITIALLY TARGETING APPROPRIATE ACCOMMODATION INVESTMENTS TO FILL THE CURRENT GAP.

There is a need and opportunity for the Town to become proactive in seeking and facilitating appropriate investment attraction, particularly when it comes to filling the accommodation gap, providing local transportation options, agritourism development including micro-breweries and distillers, as well as local culinary businesses.

In general, private sector investors look at the following attributes when considering a tourism investment:

- The degree to which tourism is recognized as an integral component of the economic base of the region. The local government(s) must be fully supportive of tourism and be able to demonstrate that support by facilitating and where possible incentivizing

tourism investment, and assisting in providing the needed infrastructure;

- Quality of tourism attractors and supporting infrastructure (transportation/access, accommodation options, food services and entertainment options) and potential competitiveness and synergies for the planned development;
- Destination marketing expenditure and sophistication in the region as their development will rely on the tourist visitors stimulated by the marketing and they fully recognize that there is a correlation between marketing effectiveness and visitation in a destination.

Some of the key lessons to be gleaned from our research are as follows:

- Preparing an investment strategy or at least investment attraction recommendations as part of a broader tourism strategy is a key tool for success;
- Coordination of broader economic development including tourism investment and economic development is common, rather than focusing on tourism investment attraction in isolation;
- Effective and competitive destination marketing effort is a critical component to investment attraction – a strong positive image and a desirable place to visit is a more likely place to invest;
- Improve the business climate and simplify the development approval process – create a single window approach if possible – single point of government contact;
- Ensure a coordinated approach for investment attraction coordinate national, regional and local approaches to maximize leverage and synergies – teamwork wins;
- Continually assess strengths, address issues that can create real or perceived disadvantages within the investment community: ease of doing business, destination image, corporate taxes, legal environment, cost structure; clearly promote advantages;
- Host, or support the hosting of a regular tourism investment trade event(s) - this seems to be an increasingly common and effective tool – most of the case study destinations use this tool effectively;
- Facilitate investment partnerships;
- Issue regular state of the industry investment reports identifying potential investment

- opportunities to a database of potential investment companies; and
- Government seed money/investment and incentives are commonplace.

An important long-term goal should be to fill the current accommodation gap. An inventory of the current accommodations in the Town of Lincoln found a total of 245 rooms available, in a wide range of commercial accommodations ranging from one 90 room hotel to approximately 50 rooms in Inns and the rest in B&B's and AirBnb's, scattered throughout the Town.

To ensure the accommodation gap is filled over time with commercial properties that contribute to the unique character of this destination the following are desirable attributes that should be pursued:

- Meet internationally recognized standards for sustainable design and operations;
- Contribute to the sense of community or destination;
- Take advantage of Lincoln's unique assets and landscapes;
- Designed to have local character and soul;
- Incorporate experiential elements and programs;
- Feature local culinary programs; and
- Offer curated retail experiences featuring local artists, artisans, and agricultural products.

Prudhomme's Landing development will have a commercial zone with space for hotel and motel development and B&B's on the main street. It has passed the draft plan of subdivision stage.

Commercial accommodation opportunity sites identified by Town staff include the following:

1. Jordan Public School: 7 acres with half in urban area, half in greenbelt in private ownership.
2. Vineland manufacturing site: in the secondary plan for Prudhomme's; site on the water; will have zoning for commercial accommodation; a longer-term opportunity.
3. In Beamsville at corner of Ontario and Green Lane (NE corner) - vacant site with general commercial zoning.
4. Interchange of Ontario St with QEW.

#### 5.4.8 Supporting Infrastructure

**Recommendation #16** – THE TOWN OF LINCOLN BEGIN TO PROACTIVELY WORK WITH PARTNERS IN ADDRESSING TWO KEY INFRASTRUCTURE PRIORITIES: THE OPPORTUNITY TO DEVELOP AN INTEGRATED TRAIL SYSTEM THROUGHOUT THE TOWN; AND THE NEED TO INVESTIGATE AND PROMOTE ALTERNATIVE TRANSPORTATION SOLUTIONS.

The Town will need to take a proactive role in developing the supporting infrastructure needed as the tourism sector grows. Some of these initiatives can be completed in partnership with others. For example, to develop an integrated system of trails through the destination the Town can work together with the Conservation Authority, the NEC and the Bruce Trail Association.

Another critical piece of supporting infrastructure will be alternative transportation methods both into and around the destination. Setting the stage for appropriate new and expanded commercial accommodations is another critical component where the Town can apply their resources and influence.

#### 5.4.9 Tourism Friendly Downtowns

**Recommendation #17** – THE TOWN OF LINCOLN ENCOURAGE TOURISM FRIENDLY DOWNTOWN DEVELOPMENT THROUGH CREATION OF PEDESTRIAN FRIENDLY AREAS WITH ADAPTIVE REUSE OF HISTORIC BUILDINGS AND CONCENTRATION OF TOURISM RETAIL, LOCAL FOOD RESTAURANTS, PUBLIC ART AND ENHANCED AESTHETIC APPEAL.

Successful small-town destinations provide visitors with a combination of authentic experiences, drawing on the local culture and history, and showcasing the natural scenery and historic architecture of the destination, while offering unique character accommodations and appealing tourist retail and dining. It is the combination of a variety of experiences that creates 'critical mass' in terms of a destination's ability to attract visitation.

While visitors to small towns are looking for a variety of experiences, it is important that they offer a tourist-friendly downtown. The downtown should function as a base from which visitors can then pursue more geographically distant attractions like a food trail or other scenic and recreation activities. A tourist-friendly downtown has a variety of stores, services and restaurants that offer modern conveniences and authentic products in an appealing, and often a historic setting. The table below provides a list of the typical retailers found in tourism communities. The focus should be on unique retailers that feature to the extent possible local made and produced products.

Jordan Village is a great example in Lincoln in that it has become a destination in its own right. The other villages lack an appealing, tourism friendly downtown core or area.

Specific actions that encourage the development of tourist-friendly downtowns include:

### **Development and Support of BIAs and Merchant Associations**

Key to encouraging diversity and quality among retailers in the downtown is the formation of a Business Improvement Area (BIA). A BIA can work with the municipality to develop and promote the area as a tourist destination and undertake strategic planning to keep the destination contemporary and interesting to visitors. Given that BIAs are driven by business owners, they have a more intimate knowledge of the local market and the needs of business owners than municipal staff. Beamsville currently has a BIA and Jordan Village has a Merchants Association.

Municipal staff should work where possible with the local BIAs and Chamber of Commerce to outline their goals for the villages – Jordan Station, Vineland, Campden and Beamsville. These should include façade and design guidelines, sidewalk seating and dining where possible, and the restoration and showcasing of historic buildings.

Typical Retailers in Tourist-Friendly Downtowns		
Antiques	Art Galleries	Bakery Products
Bird Houses	Books	Candles
Cards	Cheese	Chocolate/Candy
Christmas Items	Coffee Shop	Crafts
Dolls	Factory Outlets	Flowers
Glass	Outdoor Equipment	Local gourmet foods
Heritage/Ethnic Gifts	Home Accessories	Jewellery
Leather Items	Lifestyle Apparel	Local liquor and wines
Novelty Gifts	Perfumes/Soaps	Pet supplies
Character accommodations	Pottery	Quilts
Rugs	Skin and Health Care	Theme/Historic Restaurant
Toys	Wreaths	Local arts and crafts
Source: Adapted from Ryan, Bloms, Hovland, Scheler: <i>Tourism and Retail Development</i> . University of Wisconsin Extension Cooperative		

### **Accessible, free or low-cost parking**

Tourists are typically unfamiliar with the area they are visiting. They are also willing to spend money on a variety of experiences at the destination and usually require longer-term (i.e. more than an hour) parking. A lack of accessible parking directly in the downtown has the potential to deter visitors who are unwilling to or unsure about finding alternative parking outside of the core. Moreover, charging for parking – particularly by the hour, deters visitors from spending a significant amount of time in the downtown. This effectively curtails the amount of money they may spend in local businesses.

### **Community Improvement Plans**

Municipalities can engage in community improvement planning under Section 28 of the Ontario Planning Act. CIPs are a flexible tool to address a wide range of building and land issues through a variety of grants, low interest loans, and/or tax assistance to property owners. Examples of grant programs include:

- Façade improvement,
- Downtown and waterfront revitalization,
- Brownfields environmental assessment, remediation and redevelopment,
- Preservation and adaptive reuse of heritage and industrial buildings,
- Property tax for remediation purposes; and
- Project feasibility studies.

Through the CIP the improvement of the structural and aesthetic integrity of a tourism area can be facilitated and encouraged. The Town of Lincoln has three existing CIP's, including one in Beamsville, one in Vineland and one for mixed use/residential areas. The Town has recently completed work on a rural CIP, the first in Niagara and perhaps also Ontario. This CIP specifically incentivizes development of value added agricultural

uses such as B&B's and agritourism uses, and enables adaptive and beneficial reuse and rehabilitation of surplus and vacant buildings in the rural environment.

Increasingly cultural activities and facilities such as performing arts centres, museums or art in the built environment are recognized as strong anchors for mixed-use developments helping to provide identity and prestigious image that money cannot buy. Some of the techniques being used in other jurisdictions to stimulate private sector investment include renovation of old buildings for adaptive reuse, instituting percent for arts programs, implementing tax incentives, building in below market rent for artists, creating special zoning changes and ensuring building codes allow for work/live space for artists.

## 5.5 Five Year Action Plan

The successful implementation of this tourism strategy can be described in three phases:

Phase One: Transitions and Foundations

Phase Two: Unveiling Ontario's Newest Destination

Phase Three: Nurture and Grow the Destination

A preliminary five-year action plan for each of the nine strategic directions is outlined, followed by a more detailed action plan and related budget for key activities in Year One, 2020. These are the action steps required to implement the Strategy as outlined. These suggested action steps have been laid out by the consulting team and now require input and collaboration from the Town and other key stakeholders. In this way the Town and stakeholders will begin to take ownership in this plan, ensuring the broad buy-in, partnership creation and collaboration needed to establish the Lincoln centred region as one of Niagara's and Ontario's primary tourism destinations.

**Lincoln-Centred Tourism Destination  
Tourism Strategy 2020-2025  
FIVE YEAR ACTION PLAN 2020 TO 2025 BY RECOMMENDATION**

**5.5.1 ROLES AND RESPONSIBILITIES**

**R6 - THE TOWN OF LINCOLN TAKE THE LEAD IN ESTABLISHING A PRIVATE-PUBLIC PARTNERSHIP MODEL FOR THE DMMO AND ASSEMBLE A TOURISM STRATEGY IMPLEMENTATION TEAM TO ADVISE AND ASSIST.**

**R7 - THE TOWN OF LINCOLN PROVIDE A DEDICATED STAFF PERSON TO FULFILL THE LEAD ROLE IN IMPLEMENTING THE TOURISM STRATEGY.**

**R8 - A NEWLY RECONSTRUCTED TOURISM MARKETING ORGANIZATION MOVE TO A HYBRID STAKEHOLDER/MEMBERSHIP MODEL VS. THE OLD MEMBERSHIP MODEL.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
<i>Adopt a private sector/public sector model to implement the Tourism Strategy</i>					
1. Reach out to adjacent municipalities to partner in new Tourism Marketing Organization	X				
2. Reach out to local College/University to develop accountability research program (first step baseline research)	X				
3. Finalize boundaries of destination and develop database of all operators	X				



4. Establish Terms of Reference, including number, composition and task for Tourism Strategy Implementation Team (TSIT).	X				
5. Convene TSIT to support implementation of Tourism Strategy.	X				
6. Plan for and execute comprehensive digital communications plan to engage and inform industry, residents and stakeholders with plan, milestones to be celebrated and next steps for implementation of the Tourism Strategy.	X				
7. Develop tourism events support and incentive policy/program	X				
8. Sunset or morph Tourism Strategy Implementation Team into Tourism Advisory Team. (TAT)		X			
9. Review and actively seek provincial and federal grants to support individual initiatives.		X			
10. Initiate discussions with partners re a possible MAT		X			
11. Build in-house tourism knowledge and capacity through memberships in Tourism Industry Association of Ontario and attendance at regional and provincial conferences, meetings and workshops for networking and education of lead staff.	X	X	X		
<i>Implement a hybrid stakeholder/membership model for a refreshed Tourism Marketing Organization (TMO)</i>					
12. Work with TVTA leadership to prepare and implement a 2-phased plan to launch a refreshed and refocused TMO: Phase 1: Transition; Phase		X			

2: Shift to New Model.					
13. Structure TMO's Board of Directors to be skills-based and reflecting broadened reach, geographically and thematically.		X			
14. Actively 'detail' calendar listings on current TVTA consumer website to ensure up to date.	X	X			
15. Actively core (basic membership) opportunities to list and showcase the industry and existing offers on a new destination website, Destination Ontario (website, media relations, etc.) and Tourism Partnership of Niagara visitor-facing initiatives.	X	X			
16. Develop a core membership rate structure that is appealing for a broad diverse range of stakeholders/operators	X				
17. Revise operating name to reflect new destination brand and new approach.		X			
18. Design new simplified fee structure after destination branding and marketing plan are completed that reflect benefits to be delivered.		X			
19. Plan for and execute comprehensive communications plan to launch new structure, led by industry champions.		X			
20. Launch and actively promote hybrid model.		X	X		
21. Seek partners (in-kind and cash), sponsors, grants for marketing initiatives identified in marketing plan.		X	X	X	X

## 5.5.2 DEFINE AND BRAND THE DESTINATION

**R 9 - THE TOWN OF LINCOLN, WITH GUIDANCE FROM THE TOURISM STRATEGY IMPLEMENTATION TEAM, PREPARE THE TERMS OF REFERENCE AND ISSUE RFP FOR A BRANDING SPECIALIST TO DEVELOP A NEW BRAND FOR THE DESTINATION.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Establish Brand Development Task Force to oversee process and act as champions on introduction to industry and consumer launch. Task Force to include broad representation and skills across stakeholders and investors.	X				
2. Issue and manage RFP for outside services to complete destination branding	X				
3. Make readily available and distribute 'brand toolkit' to industry partners in both hard copy and on-line.	X				
4. Host series of brand launch events with industry partners to share opportunities and brand guidelines; respond to questions.		X			
5. Establish mechanism and point of contact for on-line, in-person and one-on-one support options for industry to access as brand guidelines are implemented.		X			
6. Purchase relevant web domain urls.	X				
7. Populate domain(s) with curated content, transitioned from and linked to existing websites that include <a href="http://www.twentyvalley.ca">www.twentyvalley.ca</a> ,	X	X			

and other relevant websites					
8. Ensure stakeholders are listed on all free relevant web listings that include Destination Ontario and the Tourism Niagara Partnership.		X			
9. Integrate relevant brand elements into Gateway and Wayfinding initiatives including signage and visitor maps, both digital and hard copy.	X				

## 5.5.3 DELIVER A TARGETED MARKETING STRATEGY

**R 10 - THE TOWN OF LINCOLN, WITH GUIDANCE FROM THE TOURISM STRATEGY IMPLEMENTATION TEAM, PREPARE THE TERMS OF REFERENCE AND ISSUE RFP FOR A MARKETING AND COMMUNICATIONS SPECIALIST TO DEVELOP A 3-YEAR MARKETING PLAN FOR THE DESTINATION TO BE DELIVERED BY THE TOURISM MARKETING ORGANIZATION.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Issue and manage RFP for outside services to develop 3-year marketing plan.	X				
2. Share marketing plan with stakeholders in support of benefits-based structure for the Tourism Marketing Organization.	X	X			
3. Seek partners to implement plan as appropriate.	X	X			
4. Implement marketing plan.		X			
5. Track and report results; adjust as needed.		X	X	X	X
6. Update marketing plan annually.		X	X	X	X

#### 5.5.4 VISITOR INFORMATION SERVICES

**R 11 - THE NEWLY RESTRUCTURED TOURISM MARKETING ORGANIZATION MOVE TOWARDS A DIGITAL VISITOR SERVICES MODEL.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Initiate Wayfinding and gateway signage program incorporating new brand	X	X			
2. Evaluate the path to purchase and travellers journey for key market segments - how they interact with the destination, the touchpoints and stakeholders to define where and how how the destination can provide visitor information	X	X			
3. Develop and launch a digital visitor information program		X			
4. Launch a competition to develop a local solution for the local transportation gap		X			

## 5.5.5 FESTIVALS AND EVENTS

**R12 - THE TOWN OF LINCOLN DEVELOP A POLICY FOR SUPPORTING TOURISM EVENTS BASED ON A STRATEGIC EVENT CALENDAR TARGETING EVENTS THAT CAN CLEARLY DEMONSTRATE TOURISM IMPACTS/BENEFITS.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Develop tourism events support and incentive policy	X				
2. Convene Task Force or Sub-committee of Tourism Advisory Team to review and prioritize existing tourism festival and events to ensure a balanced calendar with no overlaps or conflicts.	X	X	X		
3. Create plan to shift execution of major tourism events (Winter Winefest in particular) from TVTA to Town-facilitated support.	X				
4. Create and adopt criteria to separate community events from tourism events.	X				
5. Identify opportunities for new destination-wide tourism events to drive new visits during non-peak times.		X	X		
6. Facilitate development of new events, strategically.		X	X	X	

### 5.5.6 ACCOUNTABILITY RESEARCH

**R 13 - THE TOWN OF LINCOLN SEEK A PARTNERSHIP WITH LOCAL ACADEMIC INSTITUTIONS TO DEVELOP A ROBUST ACCOUNTABILITY RESEARCH PROGRAM WITH A WELL-ESTABLISHED BASELINE RESEARCH PROFILE.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Reach out to local College/University to develop an accountability research program	X				
2. Work with local businesses to develop initial baseline data set	X				
3. Initiate collection of regular visitor statistics from attractions, events and accommodation operators		X			
4. Put in place destination development effectiveness monitoring for experience/product development, capacity building, tourism event development and marketing projects		X			
5. Prepare template for Industry Market Intelligence Reports		X			



## 5.5.7 MARKET READINESS AND EXPERIENCE DEVELOPMENT

**R 14 - THE NEW TOURISM MARKETING ORGANIZATION DEVELOP A PROGRAM FOR MARKET READINESS AND EXPERIENCE DEVELOPMENT TRAINING AND PROGRAMMING FOR LOCAL OPERATORS.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Tourism Marketing Organization to retain Product/Experience Developer skills and expertise (contract or in-house) to lead the following activities in 2020/2021.	X				
1. Initiate discussions with Indigenous groups re Indigenous tourism opportunity	X				
2. Initiate discussions with Ohnia:kara Aspiring Geopark for a pilot project	X				
3. Plan, host series of market readiness workshops in support of key target markets, such as free 2-hour Ontario By Bike workshop to educate operations about how to become certified as 'cycle-friendly'.	X				
1. Plan, host workshops on 'how to increase yield through immersive visitor experiences', followed by on-site coaching.		X		X	
2. Introduce on-demand 1:1 or small group mentoring and coaching service.		X	X	X	X
3. Create a branded route on the Ontario Beverage Discovery Route ( <a href="http://www.beveragediscoveryroute.com">www.beveragediscoveryroute.com</a> ) by linking current and potential craft operations (cideries, local farm markets, breweries, distillers and restaurants)	X				

4. Add Lincoln-centred destination cycling routes on Ontario by Bike <a href="http://www.ontariobybike.com">www.ontariobybike.com</a> and Niagara Cycling Tourism Centre ( <a href="http://www.niagaracyclingtourism.com">www.niagaracyclingtourism.com</a> ) websites.	X				
5. Facilitate addition of Lincoln-centred operators to the Bruce Trail sections that run through the destination Niagara Bruce Trail (only 4 accommodators currently listed) and Iroquoia Bruce Trail.	X				
6. Work with the Bruce Trail organization to design hikes to and through the region that can be featured in their 'Event Hikes'.		X			
7. Facilitate application for at least one Ontario Signature Experience annually.	X				
8. Facilitate application for at least one new Canadian Signature Experience annually.	X				

## 5.5.8 INVESTMENT ATTRACTION

**R 15 - THE TOWN OF LINCOLN DEVELOP A PROACTIVE TOURISM INVESTMENT ATTRACTION PROGRAM, INITIALLY TARGETING APPROPRIATE ACCOMMODATION INVESTMENTS TO FILL THE CURRENT GAP.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Develop proactive tourism investment attraction program	X				
2. Share Tourism Strategy and new TMO marketing plan and target investment opportunities to 'Invest in Ontario'	X				
3. Improve the business climate and simplify the development approval process – create a single window approach if possible – single point of government contact.	X				
4. Host the first of a regular tourism investment trade event		X			
5. Develop a database of potential investors and issue regular state of the industry investment reports identifying potential investment opportunities	X				

### 5.5.9 SUPPORTING INFRASTRUCTURE

**R 16 - THE TOWN OF LINCOLN BEGIN TO PROACTIVELY WORK WITH PARTNERS IN ADDRESSING TWO KEY INFRASTRUCTURE PRIORITIES: THE OPPORTUNITY TO DEVELOP AN INTEGRATED TRAIL SYSTEM THROUGHOUT THE TOWN; AND THE NEED TO INVESTIGATE AND PROMOTE ALTERNATIVE TRANSPORTATION SOLUTIONS.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Initiate discussions with potential partners for integrated trail systems to stimulate 'slow tourism' (Bruce Trail, Conservation Authorities, MTO etc.)	X	X			
2. Plan, host series of market readiness workshops in support of key target markets, such as free 2-hour Ontario By Bike workshop to educate operations about how to become certified as 'cycle-friendly'.	X	X			

## 5.5.10 TOURISM-FRIENDLY DOWNTOWNS

**R 17 - THE TOWN OF LINCOLN ENCOURAGE TOURISM FRIENDLY DOWNTOWN DEVELOPMENT THROUGH CREATION OF PEDESTRIAN FRIENDLY AREAS WITH ADAPTIVE REUSE OF HISTORIC BUILDINGS AND CONCENTRATION OF TOURISM RETAIL, LOCAL FOOD RESTAURANTS, PUBLIC ART AND ENHANCED AESTHETIC APPEAL.**

Key Activities	Optimal Timing				
	Year 1 2020/21	Year 2 2021/22	Year 3 2022/23	Year 4 2023/24	Year 5 2024/25
1. Stimulate development of BIA's in each village/town	X	X	X	X	X
2. Work with the local BIAs and Chambers of Commerce to outline tourism friendliness goals/guidelines for the villages – Jordan Station, Vineland, Campden and Beamsville	X				

#### 5.5.11 YEAR ONE KEY PRIORITIES, ACTION PLAN 2020 AND BUDGET

<b>Lincoln-Centred Tourism Destination Tourism Strategy 2020-2025 Year One Key Priorities, Action Plan 2020 and Budget</b>						
Key Activities	Lead	Order of Magnitude Resources Required Year 1 2020	Optimal Timing			
			Q1 <i>April to June</i>	Q2 <i>July to September</i>	Q3 <i>October to December</i>	Q4 <i>January to March</i>
1. FTE Staff position to lead Implementation	Town	\$65,540 (April 1 – December 31, 2019, based on Town salary scale)	X			
2. Issue and manage RFP for outside services to complete destination branding	TSIT	\$25,000	X			
3. Issue and manage RFP for outside services to develop 3-year marketing plan	TSIT	\$20,000	X			
4. Execute marketing tactics, activities	TMO	\$75,000 (contribution)	X	X	X	X
5. Retain product, experience development expertise to initiate action on priorities	TMO	\$25,000	X			
6. Initiate accountability research baseline data gathering with partners	Town	\$5,000	X			
<b>TOTAL</b>		<b>\$215,540</b>				

## Appendix

### A. Inspiration and Lessons from Other Jurisdictions

Practices from three established and successful tourism destinations that share characteristics with Lincoln including rural economy dominated by agriculture and/or wine growing, home to a number of settlement communities and accessible from nearby major urban centres were reviewed to identify inspiration and lessons to inform the tourism strategy under development.

Prince Edward County, Ontario	Napa Valley, California	Hawke's Bay, New Zealand
<ul style="list-style-type: none"> <li>Located south of Belleville, year-round population of just under 25,000; includes 4 largest settlement areas of Picton, Wellington, Bloomfield and Rossmore and a number of smaller towns.</li> <li>Between 1999 and 2004 the number of visitors to the County grew 74% from approximately 253,000 to 440,000 annually, while spending by these visitors increased 168% from approximately \$24.4 million to \$65.4 million annually.</li> <li>Growth in visits has continued at 47.7% attracting approximately 650,000 visitors in 2012 (most recent statistics available), generating \$115.3 million in spending, an increase of 76.2%. Visitor profile in 2012 was 60% same day and 40% overnight.</li> <li>2018 Budget: \$400,000</li> </ul>	<ul style="list-style-type: none"> <li>Located an hour outside of San Francisco, California with a population 141,000 encompassing 9 communities, including the city of Napa.</li> <li>The tourism industry is the second largest employer in Napa County, after the wine industry.</li> <li>Napa Valley attracted 3.85 million visitors in 2018, increasing 4.4% each year since 2016. Visitor spending was at \$2.23 billion a 15.9% increase over 2016.</li> <li>Budget: \$8 million</li> <li>Primary funding from Tourism Improvement District (TID) special assessment on lodging; additional funding from partnerships with visitor-serving businesses throughout Napa County.</li> </ul>	<ul style="list-style-type: none"> <li>Hawke's Bay (population 165,900) located on New Zealand's North Island is one of the leading producers of wine in the country. Major cities are Napier (population 63,900) and Hastings (80,600).</li> <li>Tourism generates over \$644m per annum for Hawke's Bays economy +5% year-end July 2018, supporting just under 5,000 jobs or 6% of the work force.</li> <li>Tourism in Napier supports almost 1 in 10 (9.4%) resident jobs; visitor spending totalled \$350 million in June 2019 up from \$343 million as of May 2017.</li> <li>Budget: \$1.52 million commitment from Regional Council for next 3 years; additional funding through memberships.</li> </ul>

## **1. TAKE THE LONG VIEW WITH A SHARED PLAN AND STRATEGY**

A sustainable tourism economy takes continuous effort – to refresh and update visitor experiences, to adapt to changes in consumer interests, to respond to new partnered opportunities, to attract new investors, and investments as well as new entrepreneurs, in and beyond the hospitality sector.

There is typically no one catalyst or ‘ah hah’ moment that makes a destination attractive to visitors. Rather, it takes continuous attention and nurturing from local and regional planners, operators and marketers. It also benefits from a shared strategy and plan, with regular updates or ‘report cards’ shared with residents and stakeholders.

## **2. NURTURE AND FACILITATE TOURISM AS PART OF AN INTEGRATED ECONOMY**

Successful tourism destinations position the tourism portfolio as an integrated part of long term planning.

In early 2000’s Prince Edward County (PEC) was one of the earliest destinations to embrace the Creative Rural Economy to drive economic activity. This approach linked diverse stakeholders in agriculture, tourism, commerce, arts and culture, resulting in new connections, shared innovation, new investments and energy. It also positioned tourism as part of an integrated economy.

The Vital Signs Report 2018, prepared by The County Foundation outlines a complex picture, not unlike that in many communities pursuing tourism. Highlights include job growth, an increase in registered businesses, including new niche businesses (specialty food producers, micro breweries and wellness practitioners) as well as challenges that include a lack of tradespeople, gaps in transportation and a lack of affordable accommodation for workers.

A shared understanding of the benefits and challenges related to tourism across the community plays a role in a broader discussion and planning on how to build on successes and address challenges.



### 3. BROADEN APPEAL WITH A FOCUS ON COMMUNITY'S UNIQUE ASSETS

Successful tourism destinations provide a range of activities for visitors to engage in. This does not mean, however, that 'there is something for everyone'. Rather it means identifying what stories, landscapes, wildlife and other assets unique to the region are offered.

Many communities do not understand the richness of the stories and assets in their back yard that have the potential to play a role in building a sustainable tourism destination. By linking non-traditional venues, unusual and boutique accommodation options, personalities and practices with more traditional tourist attractors, unique experiences result.

Continuous updating of inventories is an important factor to ensure strategies are fact-based.

PEC benefits from having Sandbanks Provincial Park that in 2018 attracted approximately 600,000 visitors. The County also has a range of other outdoor activities to compliment culinary and wine-related interests. The addition of arts and culture options that include a rejuvenated Regent Theatre, located in Picton, (a year-round venue of 446 seats for live theatre, music and screenings), specialty retail, museums and historical places further expand appeal, offering activities to not only bring visitors to PEC, but also to keep them longer and at times throughout the year.

Other well-established wine and culinary destinations also understand that is important to showcase a range of activities:

- Visitors to Napa Valley have much to choose from including the Napa Opera House, ballooning, traversing the Napa Valley Vine Trail, hiking and wellness retreats.
- Napier is the first stop on the Classic New Zealand Wine Trail, a 485 km self-driving trail that visits three of the of the country's wine regions. It is home to one of the most complete collections of 1930's Art Deco buildings in the world, providing the backdrop for their annual Art Deco Festival. Other attractions include the Sea Wall, a collection of 49 paintings splayed across buildings and various exteriors throughout the city, Napier's Botanical Gardens and Marine Parade Gardens. Napier also showcases its

distinct neighbourhoods, understanding that each appeal to and offer visitors unique experiences that include a seaside port, beachside escape and a self-contained residential neighbourhood with a village vibe.

Unique accommodation options are another way to increase appeal to visitors and to differentiate from other destinations. Examples of accommodation and related experiences that reflect a strong sense of place include:

- *Alive Sky Lodge and BINcredible*, provides visitors with a queen bed, heated flooring, a chandelier and two fireplaces – one in the bathroom - on a small grain farm north of Saskatoon, Saskatchewan.
- *Swiss Tavolata* links guests to local Swiss women in rural areas who cook for visitors in their rural home, using at least 75% produce from the local region, much of it from their own farm. This allows residents and visitors to experience traditional and innovative Swiss cuisine in a real life setting.
- *Inn by Mallard Cottage*, located next to the Mallard Cottage restaurant in Quid Vidi Village, just outside downtown St. John's Newfoundland and Labrador, provides 7 king suites in 2 guest houses that reflect rural Newfoundland. Highest quality linens and amenities are used.

#### 4. DRIVE VISITS WITH FESTIVALS AND EVENTS

Festivals and events give visitors a reason to visit, motivating commitment to a specific date or timeframe. A well-managed events calendar is an important factor to sustainable tourism destinations.

PEC has extended the tourist season from 3 months (June to August) to 7 months (April to October) in part due to hosting a series of annual signature festivals and events, many outside the busy peak season. Events cover a full spectrum of music (classical, jazz, country), yoga, fishing, authors/writers, nature and more that include:

- *Maple in the County* (March) a two day, self-directed celebration of maple syrup season.

- Twice annual *Countylicious* prix fix dining experiences in typically low seasons of April and November, creating demand for area accommodators, restaurants, retailers and more;
- *Art in the County*, a juried art exhibition and sale, held late June into early July (June 21<sup>st</sup> to July 7<sup>th</sup>, 2019) in its 26<sup>th</sup> year;
- *PEC Jazz Festival* (August 17<sup>th</sup> to 25<sup>th</sup>, 2019); and
- *Gran Fondo* cycling event (September 7<sup>th</sup>, 2019) second annual.

Visit Napa Valley positions their events to follow the seasons to reflect harvest activities:

- Cabernet Season (mid-fall to spring)
- Harvest Season (August to October)
- Annual Events offering a range of culinary, sports, arts and culture, music and holiday season events.

Hawke's Bay Tourism has established several events to drive visitors to the region:

- Summer and Winter F.A.W.C! (Food and Wine Classic) events that celebrate local food and wine across the region, selling 10,000 tickets in 2018; The Winter F.A.W.C! runs over four consecutive weekends each June and features more than 60 events; the Summer F.A.W.C! offers more than 70 events over 10 days in November.
- The Big Easy cycling event, a relaxed, family-friendly 42 km riding event held annually on Easter weekend, that in 2018 attracted close to 2,000 riders; and
- Air New Zealand Hawke's Bay International Marathon held in May each year attracting close to 5,000 runners.

Napier hosts the annual Art Deco Festival, celebrating their truly unique story, attracting over 40,000 people from around the world who join in as the area embraces and celebrates the 1930's with vintage car parades, fashion shows, Gatsby-style picnics and more. The Mission Vineyards New Zealand's oldest winery, established in the 19<sup>th</sup> century and located just outside Napier is also home to the annual Mission Concert, hosting international live music acts under the stars since 1993. Michael Buble and Sir Elton John are the featured artists in 2019.

A robust and sustainable annual events calendar is best developed:

- To showcase local stories, passions and assets unique to the destination;
- To provide visitors with an experience not readily available elsewhere (for example emerging writers/authors festival, international choral competition or youth-focused event);
- Working in close cooperation with host organizations and area residents (to minimize volunteer burnout);
- Co-ordinated with operators to attract visitors when the region has the capacity to support and to eliminate hosting a number of events during the same period;
- Planned with an eye to accessing talent (musicians, artists, chefs, writers) to ensure their availability;
- Sun setting or discontinuing events when they have run their course; and
- Managing the volume of visitors to ensure each event stays true to its goals and ability to deliver.

## **5. ADOPT UNIFIED BRANDING**

A key recommendation from the 2006 PEC Tourism Strategy was to adopt a common identifier and wordmark - 'The County' - to build awareness and a cohesive brand.

Tourism Napa Valley, currently uses 'Legendary Napa Valley' as their shared wordmark to position the destination to visitors and residents.

Hawke's Bay Tourism has used 'Get me to Hawke's Bay' tagline and brand since 2011.

## 6. INVEST STRATEGICALLY INTO AWARENESS AND MARKETING INITIATIVES

Word of mouth, whether it be on-line or in person, remains the number one influencer for travellers. Engaging influencers from a variety of mass and niche industries and interests that include activity-specific focus (cycling, hiking, photography, auto travel), business travel (meetings, conferences, seminars) and leisure travellers (family travel, weekend getaways, reunions, retreats) will play a role in positioning destinations to targeted visitors.

Building awareness requires dedicated resources to ensure that social media is monitored and responded to, that requests for media trips receive the support they need and that relevant opportunities to partner at the regional, provincial/state and national level are accessed.

Hawke's Bay Tourism hosted sixty journalists in 2018, resulting in coverage that reached an estimated 100 million people. To buy that coverage would have cost \$10 million plus. But with the support of the tourism sector it cost just \$10,000.

## 7. BE CLEAR ON WHO DOES WHAT

The efforts of municipal, regional, federal operators, associations, organizations and individuals contribute to the long-term success of a sustainable tourism destination. Clarity around who does what reduces duplication and uses available funds, energy, time and expertise in the most effective way. A key feature of regional tourism organizations more importantly, is what they *don't* do.

As planning continues, questions that may be helpful include:

- Is it community development (a service or program primarily for residents) or tourism (investment to attract visitors from outside the community)?
- Is it 'on strategy'?
- Is there capacity to execute or deliver? If not, does it make sense to partner? What can we lead? What can we contribute to?

PEC's community development and tourism organizational structures have evolved and continue to do so.

In 2005, thirteen established tourism stakeholders/organizations joined to create the Prince Edward County Tourism Development Alliance to market and develop the destination. Rather than be a formalized organization, its intent was to provide a forum or venue for existing organizations and associations to combine forces and work together to achieve the goal and objectives of the 2006 Tourism Strategy.

Visit Napa Valley is clear on its role as it strategically manages tourism at high need times (non-peak and mid-week) outlined in their mission, values and strategy, below.

#### *Our Mission*

Our mission is to promote, protect and enhance The Napa Valley's position as America's premier wine, food, arts and wellness destination.

On an ongoing basis we track visitor demographics, spending, length of stay and economic contributions to the community to show the true value of travel and why tourism matters in the Napa Valley.

#### *Our Values*

We purposefully attend to our Culture of Excellence by living Visit Napa Valley's core values in terms of how we communicate, carry out our work and when engaging with our visitors, partners and each other.

- Communication: We communicate professionally, transparently and mindfully.
- Respect: We succeed based on our ability to develop and honor relationships.
- Collaboration: We reach our goals by working together to represent Napa Valley at the highest level.

- Accountability: We make a positive impact by being actively engaged, and setting and achieving actionable goals.
- Authenticity: We are genuine in our quality of work, reflecting the spirit of the Napa Valley.

### *Our Strategy*

We develop and implement marketing programs aimed at targeted consumers to build overnight stays during non-peak time periods including November – April (Napa Valley Cabernet Season) and mid-week, Sunday – Thursday nights.

Hawke's Bay Tourism, a member-based organization, is clear that their role is to get visitors to the region. The operators must then deliver.

### *Our Mission:*

Get visitors here now, doing more and coming back.

### *Our Vision:*

Tourism in Hawke's Bay is a vibrant and valued contributor to the region's economy.

### *Our Values:*

"Let's Get On With It!"

Stated another way, the role of Hawke's Bay Tourism is to 'catch them' (the visitor) and the role of the Hawke's Bay tourism industry is to enrich the visitor experience making it so memorable while they are here they will spend more and return. The majority of Hawke's Bay Tourism's activity is undertaken outside the region – where our future visitors are.

## B. Review of Organization and Structure of Select Tourism Destinations in Ontario

Brockville Population (2016): 21,345		
Services and staffing	Financial contributions and investments	Governance and oversight
<p>Tourism portfolio was part of city's Economic Development department in 2002 with contract with city of \$80,000;</p> <p>Has contracted delivery of services by Chamber of Commerce from 2003 until 2020 that include:</p> <ul style="list-style-type: none"> <li>• Visitors Guide</li> <li>• Website</li> </ul> <p>Visitor information centres</p>	<p><b>2019 Contract with Chamber: \$203,631</b></p> <p>Implemented MAT in 2018, generating \$238,000 of which some goes to the Chamber as not-for-profit organization.</p>	



<p><b>Grey County</b> Population (2016): 93,830 Encompasses 32 urban and rural communities including Owen Sound, Sauble Beach, Tobermory (including Fathom Five National Marine Park and Bruce Peninsula National Park)</p>		
Services and staffing	Financial contributions and investments	Governance and oversight
<p>Grey County Tourism: Manager of Tourism, plus 2 staff, as part of Economic Development and Tourism, under Planning and Community Development function.</p>	<p><b>2019 Operating Budget</b> (from Municipality): <b>\$180,000</b></p> <ul style="list-style-type: none"> <li>Stakeholder Engagement: \$10k</li> <li>Destination Development: (update to visitgrey.ca): \$20k</li> <li>Marketing Grey County: \$170k (\$120k direct marketing (digital &amp; print media; media relations; brochures; trade shows and promotion); \$50k indirect (graphic design, photography/video assets; social media content; vehicle operations)</li> <li>Media and Tracking: \$10k plus \$20 transferred from reserve to contribute to tracking</li> </ul> <p><b>2019 Capital Budget: \$46,800</b></p> <ul style="list-style-type: none"> <li>\$20K website development</li> <li>Transfers to reserve:</li> <li>\$7.5k update of Destination Development Plan</li> <li>\$10k future website development upgrades</li> </ul> <p>\$9.3 for future Tourism vehicle replacement</p>	<p>Tourism Advisory Committee (TAC)</p> <ul style="list-style-type: none"> <li>provides strategic direction to the Tourism Department and monitoring of the Destination Development Action Plan (DDAP).</li> <li>Voting membership includes five local members of the tourism industry or public representing a cross-section of interests in tourism.</li> <li>Grey County Council also appoints two members from Council.</li> </ul> <p>Budget guided by implementation of Tourism Destination Development Plan (DDAP); annual priorities presented to and supported by Tourism Advisory Committee.</p>

Prince Edward County Population (2016) – 24,735		
Services and staffing	Financial contributions and investments	Governance and oversight
<p>2 staff dedicated to Destination Development &amp; Marketing in Department of Community Development &amp; Strategic Initiatives, supplemented by occasional contracts.</p> <p>Shifted delivery of Visitor Services in-house in order to design delivery through various entry points to The County, rather than at one VIC through Chamber.</p>	<p><b>2019 Budget:</b></p> <p>\$400,000 from County dedicated to destination development, destination marketing and visitor services.</p> <p>Planning for MAT to cover some of these costs in 2020.</p>	<p>Destination Marketing Sub-Committee: Provides oversight and direction for Destination Marketing plan.</p> <p>Voting Members</p> <ul style="list-style-type: none"> <li>• One (1) member of the Community and Economic Development Commission</li> <li>• One (1) staff member from the Regional Tourism Organization 9 (The Great Waterway)</li> <li>• One (1) staff member from the Bay of Quinte Tourism/Living Council</li> <li>• Two (2) to four (4) citizen members at large (preference given to members with professional marketing or other relevant experience).</li> </ul> <p>Staff as non-voting resources:</p> <ul style="list-style-type: none"> <li>• The Municipal Destination Development and Marketing Coordinator or designate</li> <li>• The subcommittee may request any other agency, organization, or expert resource be represented as required and as necessary, for local issues and special purposes.</li> </ul>

Stratford Tourism Alliance (Tourism Marketing Organization); Population (2016) - 31,465		
Services and staffing	Financial contributions and investments	Governance and oversight
<p>7 staff:</p> <ul style="list-style-type: none"> <li>Executive Director</li> <li>Marketing and Media Lead</li> <li>Digital Marketing Coordinator</li> <li>Tourism and Partnership Coordinator</li> <li>Office Administrator, Board Secretary</li> <li>Acting Social Media and Partnership Lead</li> <li>Visitor Experience Team Lead</li> </ul>	<p><b>2018 Budget: \$914,000</b></p> <ul style="list-style-type: none"> <li>65% of funding from City to provide Visitor Services (\$594,000 in 2018, \$609,000 in 2019,)</li> <li>35% from             <ul style="list-style-type: none"> <li>Partner dues</li> <li>Stratford Tourism Supplement (STS)</li> <li>Co-operative marketing investments</li> <li>Sponsorships</li> <li>Government marketing partnerships</li> <li>Donations</li> <li>Commercial activities</li> </ul> </li> </ul> <p>As not for profit, accessed funding from Ministry of Rural Affairs' Rural Economic Development Programme (RED) in support of web-revamp and production of 5 high end destination videos.</p>	<p>Stratford Tourism Alliance Board:</p> <ul style="list-style-type: none"> <li>12 voting seats appointed by Board through open call among members.</li> <li>A number of seats are also available for ex-officio non-voting members from the City of Stratford, the Ministry of Tourism and the County of Perth.</li> </ul> <p>Terms are for a maximum of three (3) consecutive terms of two (2) years, each term comprising a maximum of six consecutive (6) years by one individual.</p> <ul style="list-style-type: none"> <li>Balanced representation is sought from key sectors (with no more than 2 positions representing one sector) including:             <ul style="list-style-type: none"> <li>Stratford Festival</li> <li>Stratford and Area Bed and Breakfast (SABBA)</li> <li>Stratford Business Improvement Area (BIA)</li> <li>Culinary/Restaurant</li> <li>Arts, Culture and Heritage</li> <li>Retail</li> <li>Producer</li> <li>Association</li> <li>Events and Attractions</li> <li>Citizens at Large</li> </ul> </li> </ul>

## C. Sample Destination Branding Scope of Work

### **Project Kick off**

Meeting/conference call to discuss project details, goals and objectives with Project Manager

Outline/confirm contract details

Kick off meeting with Brand Development Task Force

### **Competitive Analysis**

Review branding approach used by three key competitive tourism regions in Ontario.

### **Analysis of Visitor Dynamics**

Review available market research and tourism strategy to understand the destination, tourism experiences, target audience, and visitor dynamics.

### **SWOT**

Lead a strengths weaknesses opportunities and threats (SWOT) exercise surrounding the current brand positioning and the associated strategic alignment of the brand.

### **Brand Story & Brand Positioning Development**

- Outline the brand story
- Outline the brand positioning
- Present the brand story and brand positioning to the Project Manager via conference call
- Present the brand story and brand positioning to the Brand Development Task Force via conference call, for approval before moving to the Brand Toolkit

**Brand Visuals Development**

- Outline the brand visual style
- Create the refined logo
- Provide five examples of conceptual design elements using the new brand and logo
- Website
- Facebook & Instagram header
- Print ad
- Online banner ad
- Signature visuals
- Provide up to 4 sample text snippets for use in media releases/stories/social media posts
- Presentation of brand toolkit to Project Manager via conference call
- Presentation of brand toolkit to Brand Development Task Force via conference call

**Brand Toolkit**

Outline the Brand Toolkit including:

- Brand story
- Brand positioning
- Visual style
- Keywords
- Logo
- Typography
- Colours
- Rules for use of the brand elements
- Conceptual design elements (website, Facebook/Instagram header, print ad, online banner ad, signature visuals)
- Presentation of brand toolkit to Project Manager via conference call
- Presentation of brand toolkit to Brand Development Task Force
- Refine and finalize brand toolkit as required

- Provide logo package

#### **Destination Tasks**

- Provide all relevant background research
- Provide images for use in toolkit
- Participate in meetings, review documents and provide feedback