Chatham-Kent

Cultivating Growth, Shore to Shore

TOURISM DESTINATION MANAGEMENT PLAN

FINAL REPORT

SEPTEMBER 10, 2015

BRAIN TRUST

Marketing & Communications

Acknowledgements

The Municipality of Chatham-Kent, on behalf of its tourism stakeholders in the municipality, invested in the creation of this Tourism Destination Management Plan (TDMP). Through an RFP process, Brain Trust Marketing and Communications (BT) was awarded the contract to develop a TDMP for Chatham-Kent (CK) in January of 2015. BT's role was to lead this project while working with municipal staff and a TDMP Working Group representing the Tourism Stakeholders Advisory Council (TSAC) and broader tourism stakeholder interests (details of the members of both of these groups can be found in Appendix 1.

We appreciate the dedication of and the contributions made by the TDMP Working Group:

- Lucy Ogletree — Chair, TSAC, Owner/Operator, Harvest Moon, Dresden
- Susanne Spence-Wilkins — Co-Chair TSAC, Owner / Operator, The Crazy Eight Barn, Palmyra
- Dave Barnier — Owner / Operator Erieau Marina
- Dave Benson — Tecumseh Parkway / Heritage
- Lesley Grand — General Manager, St. Clair College Capitol Theatre / Theatre
- Shannon Prince — Curator, Buxton National Historic Site & Museum / Black History
- Pete Tsirimbis — General Manager, The Chilled Cork / Retro Suites, Chatham
- John Urban — Owner / Operator Cellar Door Wines, Wheatley

We also benefited from the dedication demonstrated by municipal staff including:

- Bob Crawford — General Manager, Community Development
- Audrey Ansell — Manager, Resident Attraction and Retention
- Patricia Peters — Manager, Tourism (contract)

We would like to express our deepest appreciation to all whose knowledge and expertise contributed to the iterative and developmental process which led to the findings and recommendations contained in this report.

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Acronyms Used in Report

B&B	Bed and Breakfast
BIA	Business Improvement Area
BT	Brain Trust Marketing & Communications
CK	Chatham-Kent
CKCC	John D Bradley Chatham-Kent Convention Centre
DMO	Destination Marketing Organization
eRFP	Electronic Request For Proposal
M&C	Meetings and Conventions
MOU	Memorandum of Understanding
MPI	Meeting Professionals International
OMTCS	Ontario Ministry of Tourism, Culture and Sport
OTMPC	Ontario Tourism Marketing Partnership
ROE	Return on Emotion
ROI	Return on Investment
RTO	Regional Tourism Organization
RV	Recreational Vehicle
SWOTC	Southwest Ontario Tourism Corporation
TSAC	Tourism Stakeholders Advisory Council
TDMP	Tourism Destination Management Plan
UNESCO	United Nations Educational, Scientific and Cultural Organization
VFR	Visiting Friends and Relatives

Visitor Statistics

A variety of reports, plans and studies have been used to support the work in this report. Much of the tourism performance statistics come from Statistics Canada. This data is generated from the two surveys, described below. Due to collection and processing time there is a lag time in producing the annual reports. Unless otherwise indicated statistics reported are for 2012.

The Travel Survey of Residents of Canada (TSRC) is sponsored by Statistics Canada, Destination Canada, formerly known as Canadian Tourism Commission, and the provincial governments. It measures the size of domestic travel in Canada from the demand side. The objectives of the survey are to provide information about the volume of trips and expenditures for Canadian residents by trip origin, destination, duration, type of accommodation used, trip reason, mode of travel, etc.; to provide information on travel incidence and to provide the socio-demographic profile of travellers and non-travellers. For information click here.

The International Travel Survey (ITS) is sponsored by Statistics Canada, Destination Canada, formerly known as Canadian Tourism Commission, and the provincial governments. Its primary objective is to provide statistics on travelers to and from Canada. This includes detailed characteristics of their trips such as expenditures, activities, places visited and length of stay. This information helps governments, municipalities, agencies and the tourism industry develop policies, products and services that correspond to travelers' needs as well as measure the contribution of international tourism to the Canadian economy. For information click here.

1. Executive Summary

Possessing a unique heritage narrative, critically acclaimed angling and revered among classic car enthusiasts, Chatham-Kent (CK) has a realistic opportunity to grow its tourism competitiveness and appeal within the next five years. Located in close proximity to a significant consumer marketplace and with a tourism sector that has a desire to get to the next level of success, CK is well positioned to implement the recommendations and strategies identified in this plan.

The purpose of CK's Tourism Destination Management Plan (TDMP) is to develop a comprehensive approach to the effective management and strategic development of community resources related to tourism (Chapter 3 and 4). "The goal is to develop a multi-year plan that provides a framework for business, local government, tourism, cultural and other organizations to analyze tourism resources and concerns, and to encourage tourism development and promotion[4]."

The process to get to this stage was industry led, under the guidance of the Tourism Stakeholders Advisory Council (TSAC) and a TDMP working group. Activities related to the process (Chapter 7) were facilitated by municipal staff who engaged the services of a tourism consulting firm. Throughout the eight month process, CK's tourism industry was involved through consultation with the tourism council, the working group, during small group and individual stakeholder's interviews, or at one of three tourism vision sessions. At the conclusion of this consultative and iterative process, the findings and recommendations were validated by those involved. Throughout this stakeholder engagement, it was evident that the tourism industry has a strong desire to come together and develop, in partnership with the municipality, a collaborative approach to tourism destination management.

To accomplish this, a definition for destination management was embraced by all involved:

Destination management is a continuous process of coordinating, investing, developing and marketing the tourism potential of a destination in ways that provides value to visitors, businesses and communities.

More specifically, tourism destination management in a CK context:

- Demonstrates the Municipality's commitment to tourism development;
- Manages expectations; is realistic what can be accomplished in 1–5 years;
- Is specific; identifies strategies / tactics and who does what, when and how, and;
- Recognizes the TDMP can't meet all industry needs and wants at once and that a timely and prioritized roll-out of actions is required.

Make Shift Happen - In the context of effective destination management, tourism stakeholders within CK will move from "supply side" thinking (listing the tourism assets as places to go and things to do) to "demand side" thinking (creating an invitation to come, discover, and engage). To make the shift to a visitor-centric approach, it is important to shift from focusing on what there is for visitors to do in CK, to asking what experiences our ideal guests are seeking, how can we deliver unforgettable experiences, what can we offer our ideal guest that is uniquely ours and how do we layer on engagement and emotion?

The answers to these questions will be reached by identifying and understanding the ideal guest with the greatest potential to impact tourism growth within CK. In addition, all involved must ensure the infrastructure, activity, and program-based tourism businesses collaborate in ways that create a compelling and differentiated invitation for the guest to visit and revisit.

It is important to note, not all businesses will share the same visitor profile as CK's ideal guest. While these businesses may not directly benefit from the activities that evolve from the TDMP, they will indirectly benefit from broader tourism growth and economic impact that will result from this focused and collaborative approach.

A thorough review of the tourism landscape (Chapter 6) on a global, national, provincial, regional, and CK-specific basis was completed. The detail related to CK's tourism performance paints a clear picture of where industry stakeholders are achieving positive results; day trip visitation for example, and also where improvement is warranted, like increasing the length of stay and average visitor spending.

A tourism asset assessment was also completed (Chapter 8). This assessment captured the majority of CK's tourism assets and was conducted from the perspective of the visitor in that it utilized tools used by a visitor to locate a tourism business. This included online searches, viewing visitor guides and community business directories. Eleven tourism business sectors were identified and a determination of tourism market readiness was presented. The assessment revealed that most of CK's tourism sectors are either underdeveloped, underperforming, or both. This assessment leads to some logical conclusions in terms of focusing attention on those tourism assets that are market ready and those where attention is required.

The assessment also revealed a number of unique themes or narratives that, when fully developed, represent opportunities to differentiate CK from other destinations and attract an increased number of visitors. The themes include the following:

- Black History narrative and attractions
- Angling opportunities
- Meetings and Conventions (M&C) / JD Bradley Convention Centre
- Classic Car / Automotive attractions
- First Nations and the War of 1812 narrative and attractions
- Small Towns, Villages, Rural Landscapes found in CK
- Agri / Culinary Tourism opportunities
- Culture opportunities (Visual / Performing Arts)

In ~2016, development and promotional priority will be given Black History, Angling, and M&C, with the balance following in the ~2017–2020 period.

Having compelling tourism themes and experiences are a part of effective destination management. Ensuring a clear understanding of the ideal guests, i.e., those who identify with the themes and are willing to take a trip to experience all that is offered is the second part of the equation and completes the process. For this reason, CK's ideal guests were identified (Chapter 9) using the Ontario Tourism Marketing Partnership Corporation's (OTMPC) market segmentation research specific to RTO1, the Ontario tourism region where CK is located.

Of the twelve potential market segments/ideal guests, two were identified as having the greatest potential to attract visitors to CK using the identified themes. The two segments are (1) Knowledge Seekers and (2) Connected Explorers. The details pertaining to these segments are included in Chapter 9. Due to the specific nature of the M&C market segment, ideal guest details are contained in the M&C section of the report.

Nine overarching findings led to the identification of a series of recommendations and action steps (Chapter 10). The recommendations take into consideration a number of key factors including the following:

- Roles and Responsibilities - Industry Led / Facilitated by the Municipality
    - Role of the tourism industry
    - Role of the municipality
- A focused and prioritized approach
- Identification of performance metrics

The planning assumption is that a tiered approach is required. An approach that manages expectations and accepts the capability and capacity limitations in the near-term for industry and the municipality will be the most effective. Recommendations have adopted a phased approach and have been developed for the;

- Immediate term (~2016)
- Mid-term (~2017)
- Long-term (~2018–2020)

In addition, recommendations are grounded in three primary areas of focus;

- Industry Equipping / Workforce Development
- Product / Experience Development
- Marketing

Meeting & Conventions recommendations have been isolated (see page 60) due to the specific nature of this market segment and the limited number of stakeholders involved. Chatham-Kent John D Bradley Convention Centre (CKCC) staff should take the lead in facilitating implementation and working in partnership with select stakeholders and the municipality.

The creation of CK's TDMP has been a rewarding experience for all involved. While expectations are high in terms of tangible outcomes, success will come when a collaborative approach to enhancing competitiveness and appeal within the municipality is embraced by tourism stakeholders from one end of the region to the other.


TECUMSEH PARKWAY
THE UNDERGROUND RAILROAD
LE CHEMIN DE FER CLANDESTIN
LES ROUTES
THIS SIDE UP
WITH CARE

2. Key Findings Summary

Nine aggregate key findings emerged from the TDMP process, including the iterative feedback process that ensured continual stakeholder input and validation over the past eight months. Each key finding, detailed in Chapter 10, is supported by specific recommendations and a series of tactical actions that provide the foundation for the implementation of CK's TDMP.

	Key Finding	Responsibility	Start - Complete
1.	The majority of tourism assets within CK are underdeveloped and therefore underperforming; there is an opportunity to provide various levels of industry equipping and workforce development, from basic to more advanced, in order to enhance the overall tourism appeal of CK.	• Stakeholders • TSAC • Municipality	~Jan 2016 – Ongoing
2.	A focused and disciplined approach to destination management will require that resources be directed at developing and promoting a prioritized list of tourism asset clusters or themes that first; differentiate CK from other destinations and second; capitalize on higher levels of tourism market readiness. The list of clusters or themes will be expanded over the next 2 - 5 years. In 2016, the following will be the featured themes/clusters; • Black History narrative • Angling opportunities • Meetings & Conventions market	• Black History stakeholders • Angling stakeholders • Municipality • CKCC	~Jan 2016 – April 2016
3.	Proactively engage with Southwest Ontario Tourism Corporation (SWOTC) to understand and leverage the product development, sales and marketing opportunities they offer within the context of CK's tourism development, marketing and sales priorities. Where alignment is not present, evaluate each opportunity and when it makes sense to Tourism Stakeholders Advisory Committee (TSAC), take steps to be a proactive partner. Solicit SWOTC's cooperation to support the tourism destination management efforts of CK's tourism industry; specifically to enhance and promote CK's identified experience clusters (Black History, Angling and M&C in 2016, and others in future years).	• Stakeholder • Municipality • SWOTC • OTMPC	~Jan 2016 – Ongoing
4.	While industry equipping / workforce development activities are initiated in 2016, these activities continue in 2017 to engage an ever-growing list of tourism stakeholders. There is an opportunity to evaluate the 2016 activity and repeat the current programs and / or create new industry equipping / workforce development initiatives. This must be an annual activity as it will continue to contribute to the overall tourism appeal of CK.	• Municipality • TSAC • Stakeholders	~Jan 2017 – Ongoing
5.	The same focused and disciplined approach to destination management introduced in 2016 continues in 2017. The approach requires that resources be directed at developing and promoting the prioritized list of tourism asset clusters or themes that differentiate CK from other destinations and capitalize on higher levels of tourism market readiness. As identified in the 2016 recommendation, the list of clusters or themes will be expanded over the next 2 - 5 years. In 2017, the following will be featured narrative themes; • First Nations/War of 1812 • Classic Car / Automotive	• First Nations, stakeholders • Classic Car / Automotive Stakeholders • Municipality	~Jan 2017 – Ongoing

	Key Finding	Responsibility	Start - Complete
6.	Enhancing CK's online tourism presence. At present CK and its tourism stakeholders have been utilizing tourism pages on the CK municipal website. While this online presence has served the destination well, this online vehicle is inadequate if CK is to get to the next level of tourism competitiveness and appeal. With the launch of the TDMP in 2015 and the ensuing activities and initiatives introduced in 2016, CK will be in a position in 2017 to strengthen its tourism online presence with the creation of a municipally owned and operated tourism website; the "Official Tourism Website of Chatham-Kent". This is a stand-alone, dynamic, visitor-centric site that is not visibly connected (from the visitor's perspective) to the municipal site.	• Municipality • TSAC • Tourism Website Task Force	~Jan – April 2017
7.	Should the identified tourism performance metrics be met in 2016 and 2017, and tourism to and within CK is growing and economic indicators are positive, remaining competitive will be incumbent upon the growth of resources allocated to tourism development and marketing. In this case, the municipality should consider increasing allocated resources for the development and promotion of its tourism sector.	• Municipality • TSAC	~2018 – 2020
8.	As market dynamics evolve and tourism stakeholders come and go, industry equipping / workforce development activities will always be a requirement if CK is to remain competitive. This must be an annual activity that contributes to the overall tourism appeal of CK.	• Municipality • TSAC • Stakeholders	~2018 – 2020
9.	The focused and disciplined approach to destination management introduced in 2016 and continued in 2017 should continue. This strategy requires that resources be directed at developing and promoting the prioritized list of tourism asset clusters or themes that differentiate CK from other destinations and capitalize on enhanced and growing levels of tourism market readiness. As identified in the 2016 recommendation, the list of clusters or themes will be expanded over the next 2 - 5 years. In 2018, support the development and marketing of CK's current and future core attractors that will include, in order of priority: • Small Towns, Villages, Rural Landscapes • Culture (Visual / Performing Arts) • Agri / Culinary Tourism	• Cluster Stakeholders • Municipality	~2018 – 2020

3. BACKGROUND

Chatham-Kent (CK) is located in the heart of Southwestern Ontario with a population of 104,075 people. It is one of the largest municipalities in Ontario, covering an area of more than 2,543 square kilometers. Located between Lake St. Clair to the west and Lake Erie to the east, CK benefits from miles of picturesque shoreline that affords locals and visitors opportunities for many forms of water-based recreation. Agriculturally rich, CK has productive farm land and is dotted with many small towns and rural villages with the city of Chatham being the major centre of commerce and the seat of municipal government.

Rich in heritage, CK was the backdrop to several major historical activities and events; these include major battles during the War of 1812 and the role as a crucial corridor and hub to the now famous Underground Railroad. These and other significant historical attributes are animated at a number of historical sites and attractions, where annually, CK's significant historical roots are acknowledged and celebrated. The destination boasts a long list of tourism infrastructure, including galleries, unique retail establishments, an emerging food and beverage scene and a number of comfortable and affordable accommodation options.

With convenient highway access, CK is well positioned to draw on a visitor market of more than 7.7 million people who live in Southwestern Ontario[1] and 4.3 million who live in Metropolitan Detroit[2]. An estimated 46 million people live within a 300 mile (480 km) radius of Detroit proper[3], which is only 85 km from Chatham; therefore the opportunities to grow tourism to the municipality are significant.

While CK had been involved in tourism development and promotion for some time, at the suggestion of the tourism industry, the municipality made a decision in 2014 to undertake a proactive and strategic tourism destination development process. Leaders in government and the private sector recognized that embarking on a long-term tourism destination management process would serve the destination well in terms of enhancing competitiveness and appeal.

"The overarching goal of Chatham-Kent's Tourism Destination Management Plan is to develop a comprehensive complementary approach to the effective management and strategic development of community resources related to tourism. The goal is to develop a multi-year plan that provides a framework for business, local government, tourism, cultural and other organizations to analyze tourism resources and concerns, and to encourage tourism development and promotion[4]."

The objectives of the plan are to:

- Take proactive steps to enhance the competitiveness and appeal of CK through effective management and strategic development of community resources related to tourism, and;
- Identify strategies and action plans to grow tourism visitation and revenues over the next 5 years.

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[1] SW Ontario population – 2011 census. https://en.wikipedia.org/wiki/Southwestern_Ontario
[2] Metro Detroit population – 2010 census. https://en.wikipedia.org/wiki/Metro Detroit
[3] Ibid
[4] The Corporation of the Municipality of Chatham-Kent, RFP - Tourism Destination Management Plan, May 2014

Working with the Tourism Stakeholders Advisory Council (TSAC), who at the time emphasized the need for a more complete and comprehensive planning approach for tourism as part of building the social and cultural fabric of CK, Municipal Council agreed to support the development of a Tourism Destination Management Plan (TDMP). The plan is designed to address potential synergies between tourism, culture and recreation. Ideally by developing a strategy to guide tourism investment and maximize existing assets, community pride and awareness will be stimulated. This, coupled with the belief that great places to visit are often wonderful places to live will enhance the appeal of CK on several levels. In addition it will build the capacity of local organizations to host events and support the development of culture- and tourism-based experiences and economic development within the Municipality.

In order to complete the TDMP, the Municipality undertook an extensive process to secure a third party consultant. Through a Request for Proposal process, Brain Trust Marketing & Communications (BT) was retained to work with tourism industry stakeholders and municipal staff to complete the assignment.

4. Visitor-Centric Destination Management

Tourism destination management is a continuous process of investment and coordination between government, and the private and not-for-profit sectors. The process ensures the strategic development of facilities, amenities, activities, services and experiences available to attract visitors while simultaneously providing business growth opportunities within the broader destination and its local communities. The visitor must be at the heart of this collaborative process. This is critical in order to leverage the contributions from all levels of government, the public and private sector (Figure 1).

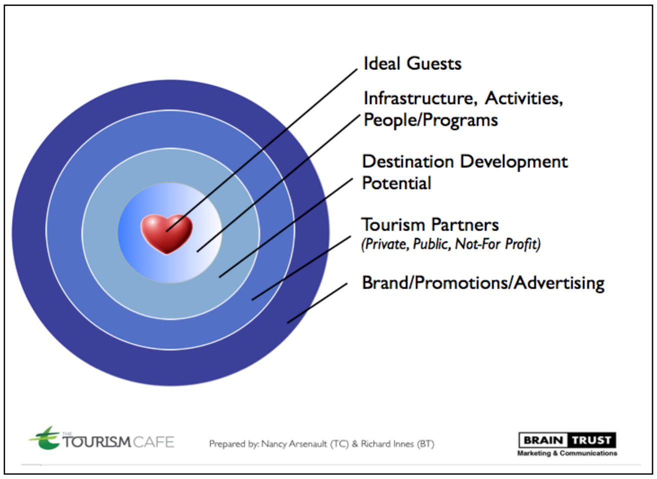


Figure 1: Visitors Must Be at the Heart of Destination Management

By understanding the benefits travellers are seeking, combined with their attitudes, values, motivations for travel and their demographic profile, businesses and destinations are in a stronger position to evaluate the alignment of their current offering.

Destination management involves many players, from an individual tourism operator through to the national destination marketing organization (Destination Canada, formerly the Canadian Tourism Commission). It's common for the customer to get lost between organizations, initiatives, mandates, and priorities. Further, while excellent research is conducted by these players, the application of this knowledge into the daily operations of individual businesses is less common. A visitor-centric destination management plan provides the mechanism to synchronize efforts around more tangible objectives, thus making it easier for organizations to collaborate and leverage resources.

The goal for CK is to identify and understand the ideal guest with the greatest potential to impact tourism growth. The aim is to ensure infrastructure, activity and program-based businesses (see Figure 3) collaborate in ways that create a compelling and differentiated invitation for the guest to visit and revisit (Figure 2).

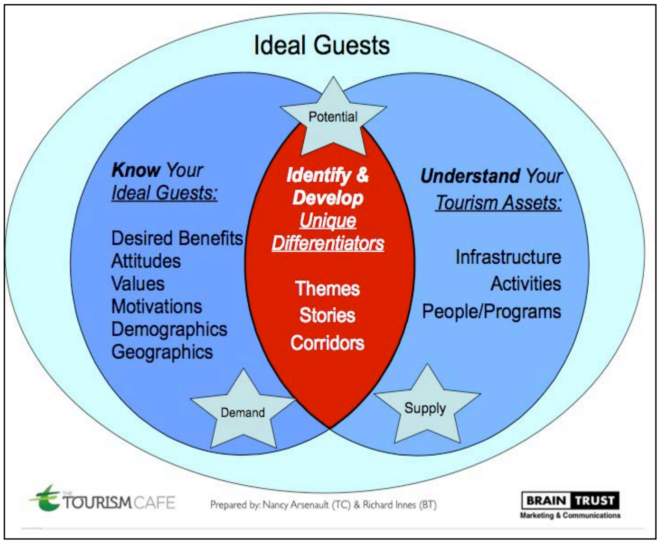


Figure 2: Destination Potential

It is important to note, not all businesses will share the same visitor profile as the destination's ideal guest. While these businesses may not directly benefit from the activities that evolve out of the destination management plan, they will indirectly benefit from broader tourism growth that will result from this focused and collaborative approach.

A Major Shift is Required

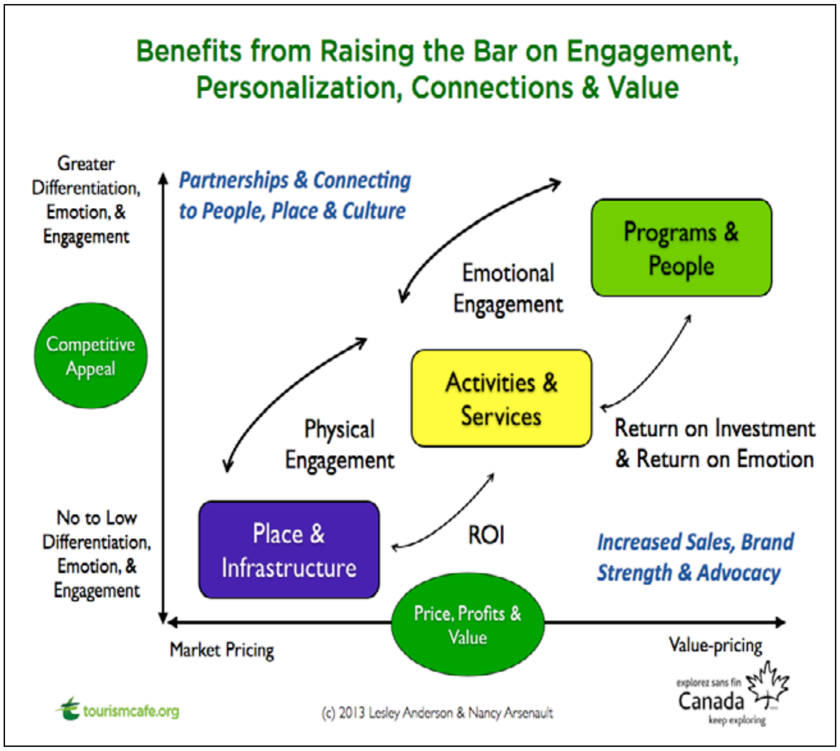
Creating memorable travel experiences, engaging activities, and effectively managing the built and natural infrastructure within CK are essential to raising the bar in relation to competitive appeal, pricing, profits and value. This is based on having a range of travel assets from undifferentiated, low emotion and engagement (e.g., a lake, trail, or museum), to those that connect emotionally with visitors to differentiate and influence price point (e.g., story teller, musician or interpretive guide). All these elements are needed in the mix.

To make the shift to a visitor-centric approach, it is important to shift from focusing on: What is there for visitors to do in CK? Who is the ideal guest? To: What benefits are our ideal guests seeking? How do we deliver unforgettable experiences? What can we offer our ideal guest that is uniquely ours? How do we layer on engagement and emotion?

Raising the Bar on Engagement

Things have changed. Over the past century, tourism in Canada was built on putting the infrastructure in place (roads, hotels, restaurants, designating heritage properties, etc.); this created the platform for creating access and opportunities to welcome visitors. Activity based tourism then began to flourish as people looked for ways to enjoy Canada. Then, with time and frequency of travel, demand began to shift towards finding ways to connect with people in ways that were meaningful, relevant, inspiring and engaging (Figure 3).

Figure 3: Raising the Bar



Place & Infrastructure Assets:
High fixed costs, need visitor volume &/or base funding. Examples: Hotels, historic sites, parks, attractions, theatres, restaurants, transportation, sports facilities & tour operators who own their transportation.

Activity & Services Assets:
Fixed cost related to activity, need steady volume but often smaller groups. Examples: Fishing outfitters/charters, artisans, horse-drawn sleigh rides.

Program & People Assets:
(1) No or low fixed costs, typically low volume, highly specialized. Examples: Guiding companies, storytellers, musicians, experience brokers (2) Use other's infrastructure; Need volume, e.g., festival and small tour operators.

The metrics of success for the types of businesses that own/operate or manage these place and infrastructure assets were highly focused on optimizing a positive return on investment and differentiation was largely based on the quality of services - for example the star rating system with hotels.

By layering activities, then programs and ways to connect with local people, tourism businesses and destinations began to differentiate themselves based on both their physical assets and their emotional appeal, as this occurred, the ability to drive tourism based on return on investment (ROI) and return on emotion (ROE) emerged. This is now creating a new way to look at increasing competitive appeal and adding product lines that deliver on value, where visitors are willing to pay a premium for a personalized and engaging experience.

MAKING THE SHIFT

In the context of effective destination management, tourism stakeholders within CK must move from "supply side" thinking (listing the tourism assets as places to go and things to do) to "demand side" thinking (creating an invitation to come, discover, and engage).

While this may appear to be a challenging task, it has the potential to be a rewarding and fruitful undertaking given that unique tourism attractors and quality infrastructure based assets already exist in CK. Focusing on infrastructure assets through thoughtful experience development along with a clustering of connected and well-themed offerings provides a good foundation for future destination management.

To illustrate[5], take the small community of Dawson Creek, located in northern British Columbia (590 kms from Edmonton, AB; 1200 kms from Vancouver, BC). Their initial invitation was to encourage visitors to come and participate in *"17 Things to Do in Dawson"* by driving along one of three routes that featured things to see and do in geographical places. Stakeholders were thrilled with this approach. However, after much effort and promotion the results were disappointing as guests didn't accept the invitation in any significant way.

In the Dawson Creek example, the places to go and things to do were not targeted to traveller types and the benefits they seek, or to their travel motivations. Marketing and promotion focused on a general approach to informing visitors what is available. This approach didn't work. However, the destination marketing organization (DMO) learned that by focusing on specific ideal guest profiles, Tourism Dawson Creek was able to work with tourism stakeholders in the community and the region to develop their first visitor-centric experience route. By focusing on what motivates a traveller, identifying the tourism assets aligned with those interests and weaving them together with a story, they were able to increase interest in both the VFR (visiting friends and relatives) market as well as their core long-haul markets, such as RV owners and motor coach operators.

This approach could be similar to the thinking behind the proposed focus for CK back in May 2014. It is illustrated in what was thought at the time to be a logical approach to tourism destination development / management. The following was presented to CK Council by the Tourism Stakeholders Advisory Council (TSAC) in May 2014:

"The Tourism Stakeholders Advisory Council supports the need to develop a vision and implementation strategy for tourism in Chatham-Kent. Historically, tourism has invested in too

5 Example - The Tourism Café, Dr. Nancy Arsenault, used with permission

many different areas, has had limited success developing key tourism products and has had no identifiable brand identity for CK's tourism offerings. The Tourism Stakeholders Advisory Council recommends CK Tourism begin this work by focusing on four pillars."[6]

Unique Downtowns	History	Outdoors	Agriculture / Rural
• Festivals / Entertainment Venues • Retail • Culinary • Arts / Culture / Historical Architecture	• Black History • Aboriginal History • War of 1812 • Culture • Classic Cars	• Provincial Parks • Waterways • Golf • Trails • Birding	Wineries Culinary Agri-Tourism

While this approach may have seemed logical from a stakeholder perspective—since it covers every possible or potential tourism asset present in CK—it is based on "supply-side" thinking. It is a list of things to see and do organized under supply-side themes. Interestingly, the statement above and the suggested solution, "*CK Tourism begin this work by focusing on four pillars"* is replicating what the previous approach was criticized for, *"Historically, tourism has invested in too many different areas, has had limited success developing key tourism products and has had no identifiable brand identity for CK's tourism offerings."*

The customer or ideal guest is lost in this "supply-side" thinking. In addition, focusing on these themes and the list of things to see and do is far beyond manageable in any development or marketing context. If this approach is followed, history will repeat itself going forward.

It is essential, therefore to "Shift" the CK approach to customer-centric tourism destination management and embrace a new way of thinking using a more relevant approach that brings the customer into the equation (see Figure 2).

[6] Tourism Stakeholders Advisory Council's Report to Council, May 2014

5. Tourism Destination Management Defined

A considerable amount of attention has recently been given to a shift in thinking and understanding regarding the role of traditional DMOs. For many, the role has expanded to include more than just the marketing of the destination. The shift has occurred as a result of DMOs, governments and tourism industry stakeholders coming to the realization that marketing the same reasons to visit year after year is not generating growing levels of tourism visitation or revenue. In addition, the marketplace has become more competitive, prompting astute tourism leaders have adopted a holistic approach to tourism. They've come to realize creating new or enhanced reasons to visit, along with supporting the enhancement of tourism infrastructure and services is more than marketing. In fact, many have changed the "M" in DMO from Marketing to Management.

That's the approach CK is taking, therefore it is important to have a clear understanding of tourism destination management. Through the steps of the destination management development process within CK, municipal staff and tourism stakeholders have embraced the following definition:

Tourism Destination Management:
A continuous process of coordinating, investing, developing and marketing the tourism potential of a destination in ways that provides value to visitors, businesses and communities.[7]

More specifically, tourism destination management in a CK context:

- Demonstrates the Municipality's commitment to tourism development;
- Manages expectations; is realistic about what can be accomplished in 1–5 years;
- Is specific; identifies strategies / tactics and who does what, when and how, and;
- Recognizes the TDMP can't meet all industry needs and wants at once and that a timely and prioritized roll-out of actions is required.

CK's Over-Arching Tourism TDMP Direction

The TDMP has been built on a foundational direction understood and validated through the extensive industry engagement phase of the project. That direction has led to the creation of this overarching TDMP direction:

> **Acknowledging that CK has attractive, appealing and unique tourism assets, as well as tourism stakeholders and a municipal government that desires to get to the next level of success, CK's Tourism Destination Management Plan is designed to prioritize and coordinate the actions required by <u>government AND stakeholders</u> to enhance the appeal and competitiveness of CK in order to drive increased levels of tourism visitation and revenue for tourism operators within the municipality. At the same time, CK's TDMP will benefit those who currently or could potentially live, work and play in CK by implementing tourism strategies and actions that enhance the community lifestyle attributes.**

[7] Brain Trust Marketing & Communications, The Tourism Café, 2014

Inherent in this process will be the opportunity to link tourism destination management and development with other aspects of municipal responsibility, including culture and recreation. Logical synergies will be a by-product of the work identified in the TDMP.

> **CK's natural and built tourism assets include many culture, heritage and recreation assets that the municipality owns and operates; therefore in the same manner in which the plan will have positive impact on tourism stakeholders, owner / operators, and the municipality will reap the same benefit.**

APPROACH TO DESTINATION DIFFERENTIATION

CK's TDMP represents not only an opportunity to establish a prioritized approach for tourism development, it also has the potential to set CK apart from other destinations through the identification, development and promotion of "unique differentiators". The supply side approach sets the stage for positioning the destination like so many others within the Province of Ontario. However, utilizing a demand side approach aligned with the identification of CK's unique tourism assets presents the opportunity to rise above the competition and attract incremental visitation based on the appeal of the unique tourism asset featured.

In Prince Edward County (PEC) Ontario, a similar TDMP process[8] was completed in 2005. At the conclusion of the process the senior economic development officer said "the outcomes of the process was the rallying cry that bought PEC's tourism industry together". Among other things, the work revealed that PEC had two unique differentiators grounded in its wine and culinary and its cultural / visual arts assets. By identifying these opportunities tourism stakeholders in PEC came together to develop their destination to create new reasons to visit.

PEC utilized these unique tourism assets to "differentiate" itself from other communities along the Highway 401 corridor. By working with tourism stakeholders the municipality facilitated a process to create unique, purchasable experiences. The Arts Trail and Taste Trail experiences put PEC on the map and to this day they represent an excellent example of community based tourism destination management. Their current website aptly describes each new product:

"Explore the Taste Trail to experience Prince Edward County's fantastic flavours! Visit local artisan shops and farmers markets to discover handcrafted preserves and locally grown goodness. Pop into a cidery, brewery, or ice-creamery for a cold treat. From pretty Pinots to cool Chardonnays, visit the wineries and taste something new. Enjoy a meal at any of the Taste Trail restaurants and see why The County was coined as Ontario's gastronomic capital! By living and

[8] Ontario Ministry of Tourism's Premier-Ranked Tourist Destination Framework process. Completed by Brain Trust in Sept. 2005.

breathing an artisanal way of life, The County has redefined progress, and we can't wait to show you how." [9]

"Art is everywhere in The County. Drive the spectacular countryside and meet the talented artists and gallery owners who make The County a beautiful place to explore, tour and unwind. With modern galleries, rustic barn studios and everything in between, the places you visit will be as diverse as the artists themselves. Explore their artistic journeys and gain insight into their original creations. Purchase a unique work of art as a keepsake of your time in The County." [10]
CK and its tourism stakeholders can identify similar opportunities once the development of unique differentiators is identified and supported. The identification of CK's unique differentiators has been accomplished as a result of the TDMP process.

ONTARIO'S SOUTHWEST (RTO1) SYNERGY

The Municipality of Chatham-Kent is located within a provincially mandated Regional Tourism Organization (RTO) in RTO1, which is one of 13 provincial travel regions. As such, CK has the opportunity to work alongside this organization to advance CK's appeal and competitiveness while supporting the region's competitive advancement too. Map 1 below shows the geographic area of RTO1.

Map 1: RTO1 Area

The provincially mandated RTO for Southwestern Ontario is the Southwest Ontario Tourism Corporation (SWOTC), which is referred to by the industry as RTO1. The region is publicly

[9] https://countymoments.ca/
[10] IBID

branded as *"Ontario's Southwest"*. SWOTC works with nine DMOs (including CK) and tourism industry stakeholders across Southwestern Ontario to promote Ontario's Southwest as a vibrant and prosperous tourism region. The organization is governed by a strong 11-member leadership Board of Directors comprised of leaders from across the industry. The Board plays a critical role in helping to shape and accelerate tourism in Ontario's Southwest.[11] At present the Board does not have any CK representation.

To date CK staff and stakeholders have engaged in some SWOTC initiatives and activities, such as partnerships in joint marketing and sales initiatives, training opportunities, and attendance at the RTO's annual conference. There are however, more opportunities that CK Tourism and its stakeholders can avail themselves of, such as birding and "Explore the Coast" motorcycling activity.

SWOTC's priority Strategic Market Sectors of focus are;

- Culinary
- Waterfront
- Significant Event Opportunities.

As part of the TDMP process, BT discussed where there are opportunities for synergy between CK Tourism and SWOTC. Recognizing that synergy is a two-way street, and there is a desire to work together, at present, SWOTC's asset cluster focus in terms of tourism development and promotion does not align with all of the assets, particularly for year one, identified in CK's TDMP. Specific detail pertaining to this is included in a SWOTC-centric recommendation later in the report.

[11] SWOTC website, https://www.swotc.ca/

6. Tourism Landscape – Market Overview & Performance

Global

Definition of Tourism
"Tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes."

United Nations World Tourism Organization (UNWTO)

Travel is one of the fastest growing industries in the world; the demand for travel continues to increase and the competition for visitors is fierce, particularly from emerging destinations, some of which are growing at a rate 13% per year.[12] Long-term projections to 2030 see emerging economies garnering 57% of international arrivals (up from 30% in 1980) and advanced economies (which includes Canada) securing 43% of the market. The UNWTO (January 2015) reports that global international arrivals increased 4.7% in 2014, well above its long-term projection of 3.8%.

In 2014, international tourist arrivals (overnight visitors) reported by destinations around the world reached 1.1 billion, representing a 4.7% increase over the previous year or 51 million additional overnight trips. This is the fifth consecutive year of growth above the long-term average (+3% to +4%) since the 2009 financial crisis. By region, the Americas (+7%) and Asia Pacific (+5%) registered the strongest growth, while Europe (+4%), the Middle East (+4%) and Africa (+2%) reported moderate growth[13].

United States

The US remains Canada's top source market, accounting for 19% of total US outbound visitation, a decline of about 4 million since 2002. Twelve states consistently generate more than 70% of total US overnight visitation to Canada and 67% of all US visitor spending within Canada. Only four of those states (i.e., Michigan, Minnesota, New York and Washington) are border-states, debunking the myth that most US travel is of the short-stay, low-spend variety.[14] The Western Hemisphere Travel Initiative also prompted a significant increase in the number of

[12] World Tourism Organization. (2013). *UNWTO Tourism Highlights, 2013 Edition.* (pg. 2.)
[13] Canadian Tourism Commission. (May 2015) Tourism as Canada's Growth Engine; 2014 Annual Report.
[14] Tourism Industry Association of Canada. (2014) Gateway to Growth: Canadian Tourism Industry Annual Report.

US citizens carrying passports, increasing from less than 20% in 2000 to almost 40% in 2013. By comparison, some 70% of Canadian citizens carry valid passports according to Passport Canada's 2012-2013 Annual Report. However, despite a 12% increase in population between 2000 and 2013, and the 46% of American citizens carrying a passport[15], the number of international outbound travellers from the United States to Canada has not increased in 14 years.[16]

CANADA

Nationally, tourism activity generated $88.5 billion in revenues in 2014 and Canada's tourism sector accounted for $34.4 billion in Gross Domestic Product. The sector employed more than 627,000 people in over 170,000 businesses. Total overnight international visitors to Canada increased to 17.1 million, up 3.2% over 2013. While Canada's tourism arrivals are gaining momentum, it is still below the global average growth rate of 4.7%[17]

In 2014, all major tourism indicators for Canada—tourism revenue, GDP, arrivals and employment—increased. Canada's tourism industry is one of the country's fundamental economic drivers and is the country's number one service export.

Increased air capacity is helping fuel growth to Canada. In 2014, over 260,000 seats were added to/from overseas markets and 454,000 to/from the United States compared with 2013. The bulk of the new capacity to/from overseas markets (165,000+) was added to service China, Germany and Japan.[18]

From January to December 2014, the national occupancy rate rose (+1.5 points to 64.3%) compared with the previous year. During the same period the national average daily rate rose to $137.28, up 3.7% compared to 2013. In 2014 Revenue per Available Room (RevPAR) was $88.21 (+3.7%).[19]

ONTARIO

Ontario's tourism industry[20] contributes more ($28.1 billion) to Ontario's economy than mining ($5.6 billion), pharmaceuticals and biotechnology ($9 billion) and advanced medical technologies

[15] Canadian Tourism Commission. (2014). A presentation by Jon Mamela, at the TIABC tourism conference, Vancouver, BC.

[16] Tourism Industry Association of Canada. (2014). Gateway to Growth: Canadian Tourism Industry Annual Report.

[17] Canadian Tourism Commission, Statistics Canada, International Travel Survey, Tourism Snapshot, 2014.

[18] Canadian Tourism Commission. (May 2015) Tourism Industry Fact Sheet.

[19] IBID

[20] Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey; Ontario Ministry of Tourism, Culture and Sport, 2012.

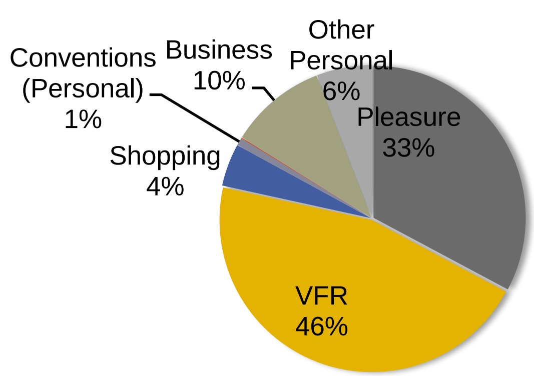
($4 billion) sectors combined. In 2012 there were 141.7 million visits in Ontario and visitors spent $22.3 billion. Visits were up 2.0%, spending was up 6.2% compared to 2011.

The total tourism employment impact (direct, indirect and induced) of tourism receipts reached 359,000 jobs, accounting for 5.2% of Ontario's total employment and total tax revenues (direct, indirect and induced) from tourism for all levels of government amounted to $12.1 billion. $6.0 billion were federal tax revenues, $4.9 B were provincial and $1.2 billion were municipal.

Ontario residents accounted for the majority of visits (86%) and spending (62%). The table below shows visits and spending by visitor origin; 65% of visits were same-day (day trip) visits driven by Ontario residents and most trips were to visit friends and relatives (VFR) (45%) or for pleasure (34%) as shown below in Figure 4. The majority of overnight visitors stayed in private homes (62%), except U.S. visitors who are more likely to stay at a hotel/motel (47%).

Visits and Spending in Ontario by Origin 2012[21]		**Origin**			
	Total	**Ontario**	**Other Canada**	**US**	**Overseas**
Total Person Visits	141,177,700	120,573,500	6,716,600	11,691,200	2,196,400
Length of Stay					
Overnight	49,537,300	37,587,600	4,340,000	5,883,200	1,726,600
Same-Day	91,640,400	82,985,900	2,376,600	5,808,100	469,800
Total Visitor Spending in Region					
Total Visitor Spending	22,037,020,000	13,553,107,000	2,234,019,000	3,338,304,000	2,911,591,000
Overnight	14,386,158,000	6,897,953,000	2,006,072,000	2,885,901,000	2,596,232,000
Same-Day	7,650,862,000	6,655,154,000	227,947,000	452,403,000	315,359,000
Itemized Visitor Spending in Region					
Transportation	7,707,535,000	4,677,598,000	849,758,000	781,105,000	1,399,074,000
Accommodation	3,436,958,000	1,547,696,000	440,813,000	938,003,000	510,445,000
Food & Beverage	6,171,622,000	4,355,663,000	628,027,000	762,319,000	425,613,000
Recreation/Entertainment	1,825,415,000	1,109,955,000	118,483,000	432,768,000	164,209,000
Retail/Other	2,895,492,000	1,862,195,000	196,937,000	424,109,000	412,251,000

Figure 4: Main Purpose of Trip to Ontario - 2012



[21] IBID

Looking ahead, Ontario visits are forecast[22] to grow an average of 1.6% per year from 2014 to 2018, while visitor spending will increase by an average of 6.4% per year. By 2018, total visits are forecast to reach 154 million with visitor spend of $30 billion. Visits among Ontario residents are forecast to increase between 2014 and 2018, with an average annual growth rate of 1.4%. Other Canada visits are forecast to increase an average of 3.2% per year. U.S. visits declined in 2014, but are forecast to grow in 2015-2018, averaging +1.5% per year. The overseas market is forecast to grow over the next 5 years at an average of 7.5% per year, especially from China with 13% annual growth.

Southwest Ontario – RTO1

In 2012, visitor spending in Region 1 (RTO1) was $1.6 billion, total GDP was $1.05 billion representing 1.7% of RTO1's GDP and total employment was 17,800 jobs or 2.6% of RTO1's employment. Total tax revenues were $570 million; $283 million federal, $239 million provincial and $47 million municipal.[23]

2012	Visits (millions)	Visitor Spending ($ billions)
Region 1	16.8	1.6
Region 1 as % of Ontario	11.8%	7.3%

Destination: RTO1 Year: 2012 [24]	Origin				
	Total	Ontario	Other Canada	US	Overseas
Visits to Region 1					
Total visits	16,831,000	13,640,300	160,400	2,957,900	72,400
Overnight	4,705,600	3,829,600	149,700	661,900	64,400
Same-Day	12,125,400	9,810,700	10,700	2,296,000	8,000
Visitor Spending in Region 1					
Total Visitor Spending	1,621,313,000	1,161,696,000	96,203,000	310,322,000	53,091,000
Overnight Visitor Spending	807,219,000	511,633,000	89,217,000	153,658,000	52,711,000
Same-Day Visitor Spending	814,093,000	650,064,000	6,986,000	156,663,000	380,000
Average per person per night	$72	$63	$119	$98	$66
Average per person per same-day visit	$67	$66	$655	$68	$47
Itemized Visitor Spending in Region					
Transport	486,893,000	383,823,000	52,291,000	42,865,000	7,914,000
Accommodation	161,053,000	112,693,000	8,414,000	26,546,000	13,400,000
Food & Beverage	527,290,000	394,625,000	28,776,000	87,869,000	16,020,000
Recreation/Entertainment	195,779,000	98,100,000	1,354,000	91,236,000	5,089,000
Retail/Other	250,299,000	172,455,000	5,369,000	61,806,000	10,669,000

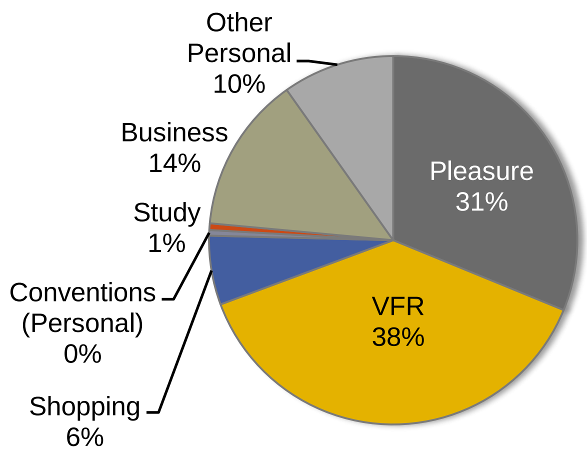
[22] Ontario Ministry Tourism, Culture and Sport, 2014. The Ontario tourism outlook is based on an econometric model which includes the following variables: GDP, CPI, Exchange Rates, and Gas Prices. https://rto7.ca/Documents/Public/Reports-Ministry-of-Tourism-Culture-and-Sport/Ontario-Cultural-Tourism-2014

[23] Statistics Canada's Travel Survey of the Residents of Canada and International Travel Survey; Ontario Ministry of Tourism, Culture and Sport, 2012.

[24] IBID

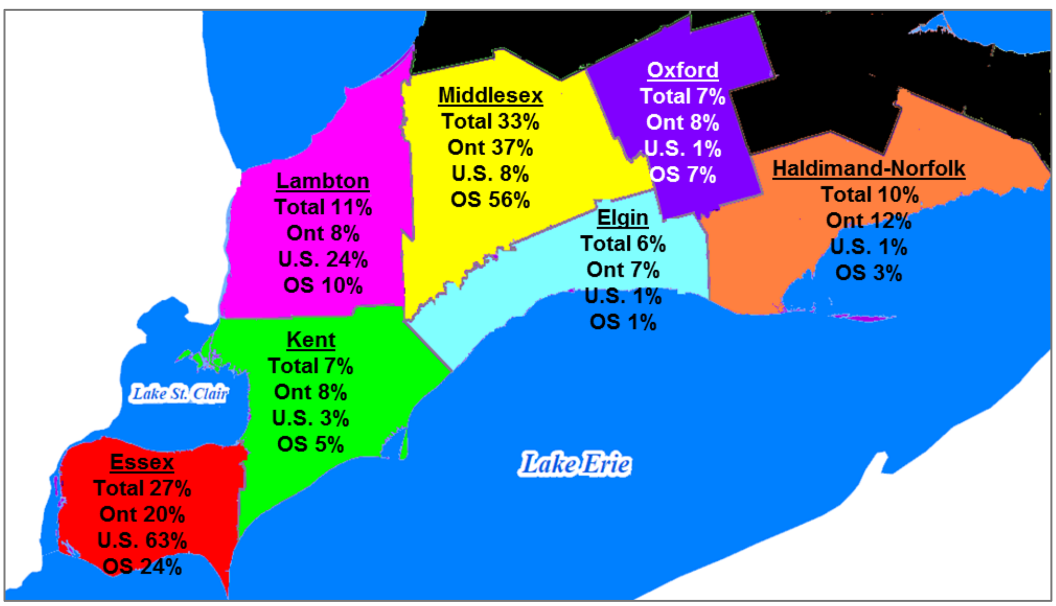
Most trips were VFR (38%) or for pleasure (31%) as shown below in Figure 5.

Figure 5: Main Purpose of Trip to RTO1 in 2012 [25]



Region 1 is the second largest region in Ontario in terms of visits and the fourth largest in terms of spending. Map 2 below shows visits and spending by visitor origin.

Map 2: Visitor Origin by Census Division



As illustrated above, visits to Region 1 are mainly to Middlesex and Essex; 63% of U.S. visitors went to Essex logically because they are a border community. 56% of overseas visitors to went to Middlesex, likely VFR guest based on the larger population of the County. Chatham-Kent received 7% of visits. Of note also, most visitors only go to one census division per visit while visiting Region which again suggests these are VFR visitors.[26]

[25] IBID
[26] IBID

CHATHAM-KENT

The most recent tourism performance indicators for CK's tourism activity illustrate that tourism is big business. The following overview provides a snap-shot of the primary tourism performance indicators within the municipality. The data is based on Statistics Canada's 2012 Travel Survey of Residents of Canada and the International Travel Survey released by the Ontario Ministry of Tourism, Culture and Sport in Jan 2015. While this data has a two-year lag time, more up-to-date tourism indicator data (not available for CK, because of a small sample size of accommodators) more recent data, such as roofed accommodation occupancy, international arrivals, and border crossing data, suggests that Canada has enjoyed growth in both visitation and spending from 2012 to 2014 (see data above) and therefore CK's performance would have likely benefited from this trend.

Total Visits

CK saw increased visits, +13% in 2012 compared to 2011. Like all destinations within an Ontario context, Ontarians are far and away the largest customer segment generating the most visits. CK enjoys significant US visitation from Border States based primarily on its proximity to the Michigan border. Travel from Canadians outside of Ontario and overseas visitation and spending are not significant to CK.

Visits to CK by Origin Year: 2012 [27]	**Total**	**Ontario**	**Other Canada**	**US**	**Overseas**
Total visits *	1,233,511	1,133,914	2,669	93,165	3,763
Overnight	321,198	269,903	2,669	44,863	3,763
Same-Day	912,313	864,011	-	48,302	-

*By comparison there were 1,091,408 person visits in 2011.

In terms of origin markets within an Ontario context, there are several key performers. Not surprisingly, the South Western Ontario region accounts for 645,039 or 52% of all person trips to CK, with Windsor and London leading the way as Ontario-based source markets.

CK: Origin of Trip - Primary	**Person Visits - 2012**
Windsor	320,379
London	157,033
Toronto	113,993
Kitchener	32,507
Hamilton	21,127

Michigan is CK's number one US based source market, with 66% of US business originating from that state, followed by 12% from Ohio. There may be an opportunity for CK to realize greater levels of US visitation especially against the backdrop of US visitation trends to Canada,

[27] IBID

which have been positively impacted by a strong US dollar and more Americans now holding a passport.

Total Spending

The municipality saw increases in spending, +23% in 2012 compared to 2011. Ontarians are the biggest spenders, followed by visitors from the US. Overnight visitors generate higher levels of spending from each source market. Average spending per visitor increases by the distance traveled, with overseas visitors generating the highest spend. US visitors with overnight spending at $98 per person visit, demonstrates the advantage of attracting visitors who not only stay overnight but who travel to CK from further afield; these travellers stay longer and spend more. Unfortunately CK's visitor spending is well below the provincial average for average person trip, overnight trips and day-trips.

CK Spending Year: 2012 [28]	**Origin**				
	Total	**Ontario**	**Other Canada**	**US**	**Overseas**
Total Visitor Spending*	67,794,002	57,223,480	2,294,253	5,530,688	2,745,581
Overnight Visitor Spending	26,915,246	17,463,559	2,294,253	4,411,852	2,745,581
Same-Day Visitor Spending	40,878,756	39,759,921	-	1,118,836	-
Average per person per night	$37	$34	$105	$42	$33
Average per person per same-day visit	$45	$46	-	$23	-
Itemized Visitor Spending in Region					
Transport	23,402,514	22,241,733	80,960	773,628	306,193
Accommodation	4,851,960	2,640,112	184,262	1,185,867	841,719
Food & Beverage	22,870,874	19,432,890	552,098	2,002,482	883,404
Recreation/Entertainment	3,530,232	2,283,137	98,462	944,529	204,103
Retail/Other	13,138,422	10,625,608	1,378,471	624,182	510,162

*By Comparison in 2011 visitor spending was $54,975,356.

Length of stay, person visits

Length of stay is a key indicator of tourism visitation. Successful destinations strive to maximize overnight visitation, especially overnights spent in paid commercial accommodations, as opposed to VFR. Recognizing that all visitors won't stay overnight, those that do have a greater impact on the local economy as they tend to spend more on tourism services. Like most destinations outside major cities like Toronto, same-day travel dominates in CK at 74% of total visitors. In 2012, CK saw an increase in same-day travel but a decrease in overnight stays.

LENGTH OF STAY	**2011**	**2012**	**% Change**
SAME-DAY	750,822	912,313	21.5
OVERNIGHT	340,586	321,198	-5.7

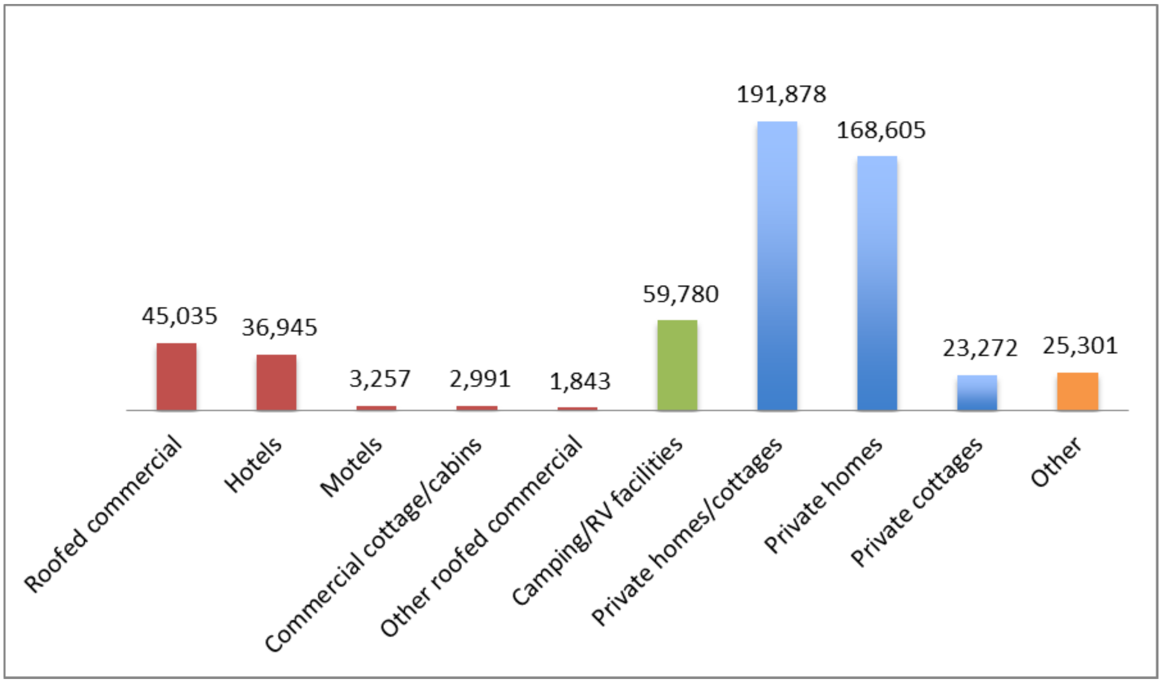
The primary focus of the TDMP's recommendations and actions will be to positively impact overnight visitation in paid commercial accommodations.

[28] IBID

Accommodation Type, Person Visits

The type of accommodations overnight guests choose impacts economic impact. Those staying in paid commercial roofed accommodations like a hotel, motel, B&B, resort or lodge (45,035 overnight person trips in 2012) have the greatest impact. In CK this accounted for approximately 14% of overnight person trip stays in 2012; 19% of overnight stays were at a campground or RV park. However, the largest portion of overnight stays were in a private home or cottage, representing 191,878 stays or 60% of all overnight stays. This is shown in Figure 6.

Figure 6: Accommodations Type (person visits) [29]



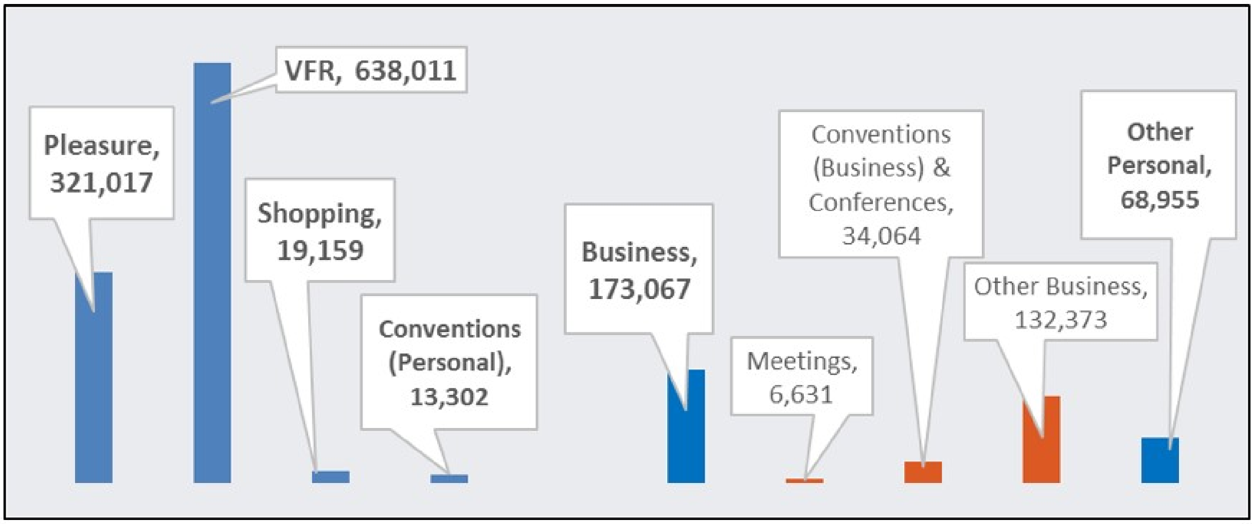
Note: Roofed Commercial, Camping/RV and Private Homes/Cottages are totals; breakdowns are sub-sets of these totals by accommodation type.

Main Purpose of Trip, Person Visits

Of CK person trips, 52% are motivated by VFR. This is consistent with all other Ontario destinations. Business travel makes up 14% of travel (shown below in Figure 7) however it is important to note that most business travel is considered essential travel and not motivated by any outside source other than a specific business, this is referred to as corporate transient business. In 2012, however, 19% of all business travel (34,064 person visits) was for the purpose of attending conventions and conferences, this compares to 3,062 person trips in 2011. While we can't definitively attribute the opening of the JD Bradley Convention Centre (CKCC) to this increase, the centre did open in December of 2011 and therefore this increase in performance more than likely had impact in 2012.

[29] IBID

Figure 7: Main Purpose of Trip (person visits) [30]



Note: Pleasure, VFR, Shopping, Conventions (personal) and Business and Other Personal are totals; meetings, conventions and other business are a subset of the total business category.

Activities Participated in, By Origin

A total of 315,120 person trips were associated with specific leisure or tourist activities in CK in 2012. Outdoor and sports related activity (44%) dominates the activities participated in with 48% of the 44% participating in a water-based activity (30% in fishing and 18% in boating). [31]

Activity Participation 2012	Total	Ontario	US	Overseas
Festivals/Fairs	12,465	10,015	2,451	-
Cultural Performances	20,670	17,646	1,987	1,037
Museums/Art Galleries	855	492	-	363
Zoos/Aquariums/Botanical Gardens	4,927	492	4,435	-
Sports Events	85,788	84,426	1,194	168
Casinos	6,160	4,821	1,339	-
Theme Parks	1,394	-	1,394	-
National/Provincial Nature Parks	32,406	22,261	9,527	618
Historic Sites	12,598	5,351	6,717	531
Any Outdoor/Sports Activity	137,856	122,988	14,065	803
• Boating	25,188	21,519	3,669	-
• Golfing	19,784	15,488	3,493	803
• Fishing	41,274	34,382	6,892	-
• Hunting	1,205	-	1,205	-

30 IBID
31 IBID

Trips by Quarter Started, Person Visits

Trips to CK take place throughout the calendar year but unlike most other Ontario tourism destinations CK received its highest level of person trips in the 4th quarter of 2012[32], as opposed to the 3rd quarter in most other destinations.

Quarter	2011	2012	% Change
Q1 (Jan - Mar)	149,404	291,155	95
Q2 (Apr - Jun)	328,027	273,463	-16
Q3 (Jul - Sep)	290,108	315,931	9
Q4 (Oct - Dec)	323,869	352,962	9

Meetings & Conference Market

The following is an overview of the current meeting and conference (M&C) marketplace in Canada. When referring to “the meetings industry” or “the M&C market” it is understood that this refers to the sector which now is increasingly recognized as “business events” encompassing meetings and conferences, conventions, tradeshows, incentive meetings and product launches.

According to Meetings Professionals International's (MPI) latest Canadian Economic Impact Study, the meetings industry represented $29 billion in attributable spending in Canada in 2012. This translated into 585,000 business events, 32.9% of which took place in Ontario. According to this study, only 41% of all meetings took place in Canada’s six largest cities (Toronto, Montreal, Vancouver, Ottawa, Calgary and Edmonton); the rest were hosted in areas outside these metropolitan areas.

The study also reported that 85% of all meetings took place in hotels and resorts, and that the average size of meetings was 74 participants. A “meeting” was defined in the study as a gathering of 10 or more people, at a contracted venue outside an organization’s place of business, for four or more hours. In 2006, when this study first was conducted, Canada reported $32 billion in spending on meetings, with a total of 671,000 business events. This means that even by 2012, the Canadian meetings industry had not yet recovered from the recession. Another study that helps provide perspective is the American Express Global Meeting & Event Forecast, which reports 70-80% of all North American meetings as having 25 or fewer bedrooms, and lasting an average of 2.3 days.

In MPI’s most recent Meetings Outlook Report[33] several interesting points were made:

- Younger professionals are increasingly understanding the value of face-to-face meetings.
- eRFPs that pop with clear details are meeting the needs of planners.
- In the past year attendance for virtual events has leveled off.
- Doing more with less - How the market is currently addressing this challenge:
    - More local/regional and in-house meetings to reduce travel – 28%
    - Compressing meetings into less time – 25%
    - More use of technology – 24%
    - Selecting lower cost destinations – 14%
- Based on current market activity there is cautious optimism that 2015 is the year when the meetings industry will finally surpass 2006 business levels.

[32] IBID
[33] Meeting Professionals International, Spring Meeting Industry Report, Aug. 2015

7. Chatham-Kent's TDMP Planning Process

The process that led to the completion of CK's TDMP was extensive and involved many steps and engaged numerous individuals. After an internal briefing with municipal staff, the initiative was launched at the February 11, 2015 TSAC meeting and then later that day at a tourism industry-wide launch presentation. That led to the initiation and completion of the following steps:

- Established TDMP Working Group
  - This group served to provide input to the consulting team, to critique, refine and validate the findings and recommendations of the TDMP (see Appendix 1).
- Literature Review
  - The consultants read an extensive range of reports, plans and studies (see Appendix 2) relevant to the TDMP planning process. This included documents created by the municipality including the Service Sustainability Review Process Report, the Culture Plan, the CK Branding Project report among others. The review also included reports created by RTO1, the Province of Ontario and any other tourism related reports relevant to the process.
- Online / On-the-ground Tourism Asset Assessment
  - A summary of this activity is detailed in Section 8.
  - The on-the-ground assessment sites are listed in Appendix 3.
- One-On-One Dialogue
  - The consultants undertook to connect with and interview a wide range of tourism stakeholders (50+) throughout the process; this included tourism operators, municipal staff, RTO1 Executive Director, Ontario Ministry of Tourism field staff among others. These conversations helped the consulting team understand the history and current realities facing CK as it undertakes its TDMP process.
- CK Municipal Staff / Information Sessions
  - Wanting to ensure a complete understanding of the TDMP process, two sessions were held with senior municipal staff. In one session senior managers from many municipal departments participated in a session designed to provide an overview of the TDMP process and to gain input on the process and how it could impact the various municipal departments.
  - A second session was held with the senior management team from the Community Development Department. This step was taken to ensure TDMP recommendations were considered in relation to the department's activities.
- Dialogue and discussion with Chatham-Kent JD Bradley Convention Centre staff
  - The lead consultants for this project (Brain Trust) retained the services of a meetings and conventions market specialist to assist with the M&C component of the TDMP. Doreen Ashton Wagner of Greenfield Services conducted interviews with CKCC staff and conducted her own online assessment of CK's M&C assets, focusing on hotels and other meeting venues.
- Tourism Stakeholders Advisory Council sessions/dialogue.
- Stakeholder Vision Sessions (3)
  - In order to garner understanding and input from tourism stakeholders, three TDMP Vision Sessions were held in May 2015 (Chatham, North Buxton, and Dresden). The sessions provided an opportunity to update the industry on the TDMP process and to share initial observations and findings and receive input and feedback, and ultimately validate the conclusions being reached through the planning stage of the TDMP process. These sessions were well attended with

over 60 individuals participating, representing a wide range of tourism stakeholders.

- Internal Team Review Sessions / Dialogue
    - o Ongoing discussions took place with the municipal staff throughout the process. These conversations contributed significantly to the planning process and ensured the various steps taken were in line with stakeholder and municipal expectations.
- Final Working Group Session
    - o On August 6, 2015 a session was held with the TDMP Working Group. The purpose of this session was to review the TDMP outcomes, directions and recommendations and secure any final input, feedback and ultimately validate the recommendations. This was a most productive session as the feedback offered by the group further refined and improved the ultimate direction and recommendations included in the TDMP. The Working Group validated the direction with their suggested refinements.

Tourism Stakeholders Advisory Council Session

- o Subsequent to the August 6, 2015 Working Group Session, the consultants presented an overview of the refined TDMP outcomes, directions and recommendations to the TSAC. At this session, TSAC representatives had an opportunity to understand fully the direction and priorities of the TDMP and to provide input and feedback to the information presented. Significant discussion took place at this session and constructive feedback was provided. The TSAC ultimately validated the direction, recommendations and priorities.

- Public Meeting – August 31, 2015
- Presentation to Council – planned for September 28, 2015

8. Chatham-Kent's Tourism Assets

An assessment of CK's tourism businesses was a necessary step to help define what CK has to offer relative to the infrastructure, activities and programs and people that visitors can experience. (See Figure 3, Raising the Bar Model). Using an Asset Assessment Template, businesses related to tourism were identified and listed under a variety of asset sectors or types. The compilation of these assets provided clarity around where the greatest opportunities are and where there is untapped potential for tourism development and promotion.

NOTE: The asset assessment IS NOT an inventory of <u>all</u> tourism assets in the municipality. It is an attempt to capture the vast majority of tourism assets using a number of sources in order to inform the TDMP process. For example, the majority of tourism assets are listed on the municipal website, in the tourism visitor guide, the Farm Fresh directory or other business directories. These lists were utilized as the foundation of our identification process. Online research went deeper to identify other tourism assets that may not be listed and was done through the lens of a potential visitor. If a tourism business could be easily found through a website search it was included, if it wasn't readily accessible it may have been missed. There is confidence among the working group, municipal staff, the TSAC and the consultants that the vast majority of assets have been captured therefore providing a solid basis for tourism asset assessment.

The Asset Assessment Template was completed using both on-line (desk-based) research and on-site visits. Initially, the Municipality of Chatham-Kent provided a database and working document of tourism businesses. This information became the foundation of the asset data and was added to through on-line searches in business directories, community websites and other tourism related portals.
The on-line assessment was completed in February and March 2015. This early work allowed for the identification of experience clusters and demand generators.

The consultant then spent 10+ full days on the ground in Chatham-Kent visiting the major tourism attractions, staying with a variety of accommodators and dining in many F&B establishments (see appendix 3). Meetings were conducted individually and with groups of tourism operators throughout the municipality to garner first hand understanding of CK's opportunities and challenges and of the experiences offered and the infrastructure present to attract and service guests

The consultant also attended several Chamber and BIA functions, took in a performance at the Mary Webb Centre, hiked the trails at Two Creeks Conservation Area and among others things went on a guided tour of Wheatley with several leaders in that community and visited Wheatley and Rondeau Provincial Parks.

The consultation process with the TDMP Working Group validated the key findings and the recommendations that stemmed from the aggregated information that the assessment template provided.

Tourism Asset Summary

The assessment template is not to be considered a tourism asset inventory. Businesses that are not effective at online marketing and any newly established businesses may not have been included.

Visitation trends are noted in each section to follow. The primary source of the data is from the Ontario Ministry of Tourism's Chatham-Kent Regional Tourism Profile, compiled by Statistics Canada for 2011 and 2012. These trends are not available for all tourism asset types but where they are included they provide context in terms of the levels of participation and visitor spending.

The Assessment Template identified 558 tourism assets. The following table provides a snapshot of these assets by tourism category. Most of the assets fall into the infrastructure category, followed by activity service based assets and people-program based assets. See Raising the Bar graphic, Figure 3, page 13.

	INFRASTRUCTURE / PLACE BASED ASSETS	ACTIVITY / SERVICE BASED ASSETS	PEOPLE / PROGRAM BASED ASSETS
TYPICAL BUSINESSES	Hotels, historic sites, parks, attractions, theatres, restaurants, transportation, sports facilities & tour operators who own their transportation.	Fishing outfitters/charters, artisans, horse-drawn sleigh rides.	Guiding companies, storytellers, musicians Festival and small tour operators.
CHARACTERISTICS	High fixed costs, need visitor volume &/or base funding.	Fixed cost related to activity, need steady volume but often smaller groups.	No or low fixed costs, typically low volume, highly specialized. Use other's infrastructure.

	INFRASTRUCTURE / PLACE BASED ASSETS	ACTIVITY / SERVICE BASED ASSETS	PEOPLE / PROGRAM BASED ASSETS
			Need less volume and charge higher prices.
CHATHAM-KENT ASSETS	There are a total of 497* infrastructure assets: • 64 roofed accommodations • 18 camping/RV parks • 198 restaurants • 60 retailers • 54 agri-culinary assets • 28 natural assets (26 have trails) • 16 culture assets • 14 heritage sites • 31 outdoor-based assets (including 12 golf courses) • 7 bait / tackle shops • 6 marinas	There are a total of 25* <u>outdoor</u> activity based assets including: • 7 angling operators • 4 ice fishing companies • 5 horseback riding facilities • 4 hunting operators • 1 boat charter • 4 other	There are a total of 45* program / people assets. This includes 27 festivals/events: • 6 automotive • 4 fishing festivals/tournaments • 1 First Nations Pow Wow People providing experiences include: o 10 fishing charters o 4 angling/hunting guides o 3 historic Black History sites, 2 with storytelling o 1 guided tour (ghost walk)

* Some assets fit more than one category. Not all asset categories are shown in the chart above. More details are provided in the sections to follow.

Infrastructure- Place Based Assets

The infrastructure-place based category includes many of the typical assets that one would associate with tourism. While these are positioned low in terms of level of engagement, personalization, connections and value, they are important foundations of a visitor destination. The tables to follow in this section provide a snapshot of Chatham-Kent's assets that fall into the infrastructure-place based category.

Accommodations

Accommodations are a very important part of tourism infrastructure as they provide the home away from home for the visitor and allow visitors to stay longer in the area and spend more money. In CK this assessment included year-round roofed accommodations as well as seasonal rental cottages, campgrounds and RV parks.

Category	# Of Properties	# Of Rooms / Sites	Daily Price Range	% Open Year Round	% High Season (May – Sept)	% Open at least 6 months
Hotel / Motel	25 *5 branded*	708	$75 -$150	96%	-	4%
B&B	23	60	$60 - $135	60% +	NA	NA

Category	# Of Properties	# Of Rooms / Sites	Daily Price Range	% Open Year Round	% High Season (May – Sept)	% Open at least 6 months
Cottages, Cabins	10	44	$80 - $100	40% +	NA	40%+
RV Parks and Campgrounds	18	702 (51% full service)	$17 - $66	17%	22%	61%

Key Findings

- CK has a variety of accommodation options that are available throughout the year at a variety of price points. In some parts of the region, accommodations are scarce but visitors only need to travel a short distance to find suitable accommodations in nearby, larger communities.

Visitation Trends

- The 2010 Annual Provincial Park Report[34] (the latest we could access) shows Rondeau Provincial Park at 66% occupancy in July/August while Wheatley Provincial Park was at 48% (the average occupancy for the Southwest region is 71%). Both Provincial Parks are underperforming;
- 32,406 visitors to Chatham-Kent visited a Provincial or National Park in 2012; and
- Provincial Park attendance by non-border States grew from 649 in 2011, to 3,037 in 2012 while overseas attendance declined from 3,174 in 2011, to 618 in 2012.

Food & Beverage – Dining Assets

Like any destination, restaurants are important to Chatham-Kent's tourism industry. The asset assessment included 198 assets located throughout the municipality (not including fast food chains).

Location	# Of Properties	Location	# Of Properties
Blenheim	7	Mitchell's Bay	2
Bothwell	7	Morpeth	1
Charing Cross	2	Pain Court	3
Chatham	88	Ridgetown	13
Dresden	7	Rondeau	1
East Kent	1	Thamesville	6
Erieau	3	Tilbury	12
Grand Pointe	1	Wallaceburg	24

[34] Ontario Parks (2010). Ontario Provincial Parks Statistics 2010

Location	# Of Properties	Location	# Of Properties
Highgate	2	Mitchell's Bay	2
McKays Corner	1	Wheatley	7
Merlin	3		

Key Findings

- Chatham Kent has a variety of dining options that are available throughout the year at a variety of price points;
- While the majority of dining opportunities are located in Chatham, there are options in many of the smaller towns and villages;
- The majority of assets offer family/casual dining; and
- 16 restaurants offer fine dining.

Visitation Trends

- In 2012, visitors to Chatham-Kent spent $22.8 million on food and beverage. This represents 34% of total visitor spending.

Culture Based Assets

Cultural based infrastructure includes venues that are often unique to a destination and showcase the character of a place – its people, their history and the landscape that shapes them. The assessment identified 16 assets (N=16). These assets play an important role due to the types of people-based experiences they offer. Note: In the tables that follow, the N=x refers to the total number of assets in that category.

Type	# of Assets N = 16 *
Art Galleries	5
Genealogy	1
Movie Theatres	2
Performing Arts Venues	8

Key Findings

- The highest concentration of assets is located within the city of Chatham (69%);
- 8 performing arts venues provide infrastructure necessary to offer people/program based experiences; and
- 5 art galleries, open year-round.

Visitation Trends

- 20,670 visitors attended a cultural performance in 2012; and
- In 2012, visitors to Chatham-Kent spent $2.2 million on culture-related activities.

Heritage Based Assets

Heritage tourism assets include the living culture, history, and natural history of communities. The CK assessment revealed 14 assets.

Type	# of Assets N = 14
Museums/Historical Attractions	13
National Historic Sites	1

Key Findings

Classic Cars:

- RM Classic Car Museum; and
- + 6 festivals that celebrate cars (Retrofest, Bothwell Old Autos Car Show, WAMBO, Mitchell's Bay Antique Car show, Blenheim Car Show and Firefest).

Underground Railroad Heritage:

- Blenheim District Freedom Library and Museum;
- Uncle Tom's Historic Site and Museum;
- Buxton National Historic Site;
- Chatham Kent Black Mecca Museum; and
- + 3 festivals (John Brown, Emancipation Day and North Buxton Homecoming).

Visitation Trends

- 12,598 visitors went to a historic site in 2012; and
- Historic site attendance by US visitors went from 2,749 in 2011 to 6,717 in 2012, likely due to the War of 1812 celebrations.

Outdoor Recreation Based Assets

Outdoor Recreation based infrastructure includes land- and water-based assets that provide visitors with a backdrop to enjoy a variety of activities.

Type	# of Assets N = 38
Driving Ranges	2
Golf Courses	12
Mini-golf	1
Public Launch and Docking	8
Marinas	6
Motor sports	1
Bait shops	7
Harness Racing	1

Key Findings

- There is critical mass in golf courses in Chatham-Kent, however few would be considered “destination golf” facilities. This is consistent with other communities throughout Ontario; and
- With Chatham-Kent situated between Lake Erie and Lake St. Clair, water-based assets like boat launches and public docks are plentiful.

Visitation Trends

- In 2012, boating in CK by Ontarians accounted for 21,519 person visits.

Natural Assets and Trails

A community’s natural assets are important for on-going sustainable tourism, especially related to activities that take place in the outdoors. Chatham-Kent’s location on the shores of Lake Erie and Lake St. Clair make water-based natural assets particularly important as they allow visitors the opportunity to access the water. Provincial parks and conservation areas are also important infrastructure that allow for activities and outdoor programming to take place.

Asset Type *	# of Sites / Properties N=28
Beaches	8
Conservation Areas	11
Gardens/Community Parks	1
Lookout / Viewing Point	7
Natural Attractions	8
Provincial Parks	2
Rare Plants/ Nature Reserve	1

Trail Type *	# of Trails N=26
Walking/Hiking	16
Waterfront	15
Mountain Biking	5
Cross Country Skiing	1

*Some assets fit more than one category

Key Findings

- Chatham-Kent offers visitors many locations to experience nature with 11 conservation areas and 2 provincial parks; and
- The natural areas in Chatham-Kent provide more than 26 different trails with over 33 km of trails, not including those located in Wheatley and Rondeau Provincial Parks.

Visitation Trends

- In 2012, 32,406 visitors went to provincial parks in Chatham-Kent.

Agri-culinary Assets

Agri-culinary tourism includes any tourism experience in which one learns about, appreciates, and/or consumes food and drink that reflects the local, regional, or national cuisine, heritage, culture, tradition or culinary techniques.[35] Chatham-Kent's rich agriculture infrastructure makes this an important asset. For example CK has the number one fresh water commercial fishing port in the world and is the number one producer of several fresh vegetables including carrots, tomatoes, seed corn, cucumbers, pumpkins, green peas and quail in all of Canada[36].

The visitor market is an opportunity for some in the agriculture industry to diversify and expand their traditional operations and make experiences available to the visitor market.

Agri-Culinary Based Assets	# of Visitor Opportunities
Total Number of Assets *	54
Vineyards	1
U-pick	5
Farm Gate	21
Farmers' Markets	1
Fish Market	3
Garden Centres	8
Orchards	5
Organic Farms	1
Meat Market	6
Farm Attractions	1
Other (mushroom farms, winter berries, Himalayan Yaks etc.)	6

Key Findings

- 40 of the Agri-culinary based companies are members of Buy Local, Buy Fresh! Chatham-Kent.

[35] Ontario's Four-Year Culinary Tourism Strategy and Action Plan 2011-2015
[36] http://wegrowfortheworld.com/did-you-know/

- The Buy Local! Buy Fresh! Chatham-Kent website provides visitors an extensive directory of members associated with the buy local, buy fresh initiative. The website also provides a map of the location of local farms in the municipality with descriptions of activities and links to each farm's website; and
- Chatham-Kent offers visitors 21 farm gate locations.

Visitation Trends

In the Canadian travel market study conducted in 2007, a profile of the Canadian agri-tourist revealed that 15% of pleasure travelers participate in agri-tourism activities while on a trip in Ontario.[37] It is safe to say without more up-to-date data this trend has only increased.

CK Visitor Information Services and Tourism Signage

Destination Marketing Organizations from coast to coast are evaluating their role in delivering visitor information. As technology changes consumers have a variety of tools to access information especially when they are on the move. Smart phone technology and supporting apps provide relevant and timely information. For this reason, DMO's are closing their traditional visitor information centres (VIC).

The municipality currently delivers information services through a staffed visitor information centre located just off Highway 401 at the RM Classic Car Museum. The VIC serves a dual purpose. Staff offer visitors one-on-one visitor information and travel counselling. Brochures displayed in racks supplement personal travel counselling and give visitors the opportunity to walk away with printed materials. CK's visitor guide is also distributed at the VIC. Staff also serves as "tour guides" to individuals who wish to visit the museum. This dual role is not ideal especially when a staff person is providing a tour leaving the info desk unmanned.

Visitor way-finding or signage is an integral aspect of the visitor experience. Navigating to and within a destination should be easy, therefore having tourism signage in place that enables visitors to efficiently travel is fundamental. Within CK, attempts have been made to enhance the visitor experience through the placement of some tourism signage. For example, the Underground Railroad attractions posted directional signage several years ago that was designed to assist the visitor to travel an efficient route to see and experience three specific historic sites. However, there is room for improvement as currently there is either a lack of tourism signage or the inconsistency of its presence creates a challenge for those who don't know the area and are attempting to travel to see the many sites and attractions.

Key Findings

- The province operates a full service visitor centre at the Tilbury ONroute service centre (eastbound lanes of Hwy 401). This Centre is fully serviced VIC providing extensive information about all of Ontario's 13 travel regions, including information for CK.
- CK rents 2 display cabinets in the ONroute VIC and showcases the regions core tourism attractors through display of relevant artifacts and materials.
- ONroute travel counsellors are well versed about CK tourist attractions and infrastructure
- The CK VIC receives limited visitation due to the changing behaviour of travellers.
- Impending construction at the Hwy 401 interchange will impact access to the VIC.

[37] SWOTC Agritourism Development Strategy and Marketing Plan, 2011

- Visitor signage is present in some areas however it is inconsistent in appearance and in posting location.
- In 2009, the municipality undertook an extensive visitor signage review and the resulting report identified a number of relevant and attractive recommendations to enhance tourism way-finding with CK.

Activity- Service Based Companies

Activity-based assets are often trip motivators for visitors. In Chatham-Kent, 25 outdoor recreation activity assets were assessed.

Outdoor Activities

Activity Based Companies	# Of Visitor Opportunities
Total Number of Assets	25
Angling on site	7
Boat Charters	1
Horseback Riding	5
Hunting on-site	4
Ice Fishing	4
Paintball	1
Sailing/Windsurfing/Stand-up Paddle Boarding/ Kite surfing/ Canoeing	2
Scuba	1

Key Findings

- The majority of the activity based assets are water-based, with a particular emphasis on angling; and

Visitation Trends

- In 2012, 137,856 visitors to Chatham-Kent participated in an outdoor activity.

People and Program-Based Assets

Program and People-Based assets are positioned highest in level of engagement, personalization, connections and value – they are what make CK come alive. Festivals emphasize the uniqueness of the area and often celebrate the history and culture that is unique to the host community. Programs and people assets in Chatham-Kent, such as artists, storytellers, musicians and guides are what make a visitor’s experience memorable and personal.

Festivals and Events

For those in the tourism industry, festivals have a positive impact in three parallel areas: attracting tourism, improving the place's image, and supporting the local community[38]. In Chatham-Kent, 27 festivals/events were identified.

Event Type	Number of Events	1-day Length	2-3 day Length	4-7 days Length	1 week + Length
Car Themed Event	6	4	2	0	0
Community Celebrations that attract visitors	10	1	5	4	0
Cultural Event (Moraviantown Pow Wow)	1	0	1	0	0
Historic Themed	3	2	0	1	0
Music Festival	3	0	2	1	0
Angling Festival	4	1	2	0	1
Total Number of Events	27	8	12	6	1

Key Findings

- The majority of the events held throughout Chatham-Kent are community celebrations;
- Unique cultural events include six car themed events and one First Nations Pow Wow; and
- There are four angling festival/tournaments (the Wheatley Fish Festival attracts over 500 participants, the Mitchell's Bay Bass Tournament accepts 120 boats, the Great Erie Salmon and Pickerel Hunt is in its 35th year and attracts anglers from far and wide, and there is a Kid's Fishing Derby). All these, with the exception of the kid's event, which is local, draw fishers from out of town.

Visitation Trends

- 12,465 visitors attended a Festival/Event in CK in 2012.

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[38] Ketter, Eran. It's Festival Time: The Role of Cultural Events in the Tourism Industry, Tourism Review, 2010

Culture – People-Based Programming

Type	# of Assets
Guided Tours	1
Heritage Sites with storytelling	2

Key Findings

- While there are a limited number of cultural programs in Chatham-Kent the few that do exist are authentic and unique to the area;
- The area has a rich Black History/Underground Railroad cluster;
    - The Chatham-Kent Black Historical Society preserves the area's rich Black history with landmarks, parks and heritage plaques, functioning as both a tourist attraction and research facility.
    - Buxton National Historic Site and Museum is a tribute to the Elgin Settlement, established in 1849 by Rev. William King.
    - Uncle Tom's Cabin is an open-air museum and African American history centre in Dresden and features the home of Josiah Henson, a former slave
- There are strong story themes in the areas of First Nations / War of 1812 with Tecumseh. There are also "animators" who creatively and effectively retell stories of 1812 and others. These "actors" make the history come alive. In addition, the Tecumseh Parkway, which at present is a static, passive and one dimensional route, is an amazing backdrop in which to stage tourism experiences utilizing people who are motivated to tell stories of the past.

Visitation Trends

- The Canadian Tourism Commission has identified Aboriginal tourism as one of six strategic issues with potentially significant implications for Canada's tourism industry.[39] This leads to support for authentically animating CK's First Nations narrative.

Angling and Guiding- People Based Programming

Angling and Hunting Based Companies	# Of Visitor Opportunities
Total Number of Companies	14
Fishing Charters	10
Guide Service (Hunting and Angling)	4

[39] Canadian Tourism Commission (2008). Aboriginal Tourism Opportunities for Canada

Key Findings

- Angling has a strong infrastructure base in Chatham-Kent with 10 fishing charters that accommodate fishing and operators who sell bait and tackle.

Visitation Trends

- Stats Can Data shows fishing by Ontario visitors to Chatham-Kent represents 34,382 person visits in 2012.

Meetings & Conferences

The Meetings and Conferences (M&C) sector is a significant source of business for many communities from coast to coast. These destinations are heavily engaged in this very competitive market segment and investments in new or enhanced meeting facilities are being made annually.

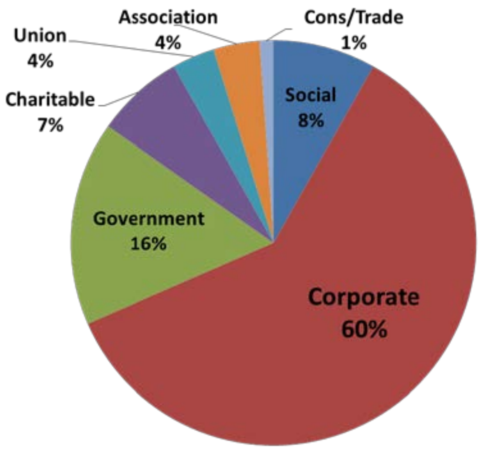
The John D Bradley Chatham-Kent Convention Centre (CKCC) is CK's entry in the marketplace and since its opening in 2012 has attempted to gain a share of the lucrative M&C market.

CKCC Events by Group Type - 2014

	# of Events		# of Guests	
	2013	2014	2013	2014
Q1	97	110	14,607	17,532
Q2	122	130	8,100	11,900
Q3	72	76	4,352	3,626
Q4	146	145	13,729	12,268
YTD	437	461	40,788	45,326

Source: CK John D Bradley Convention Centre

Figure 8: CKCC Events by Group Type - 2014



Source: CK John D Bradley Convention Centre

Key Findings

- The CKCC saw growth in terms of number of events and guests in 2014;
- Corporate and government meetings make up the majority of the centre's business;
- Anecdotally, we understand that the majority of this business is regional, generating a small amount of overnight visitation; and
- While the facility is well equipped and of a size suitable for hosting small to mid-sized meetings, conferences and trade shows, the lack of sizable accommodation options attached or within close proximity (walking distance) of the building is a barrier for some meeting planners.

Online Presence / Voice of the Customer Assessment

A tourism destination and its tourism operator's online presence is critical to its success. It is the primary avenue potential visitors take to search out, understand, plan and book a visitor experience. As such the number of places where tourism destinations and businesses can provide information to travellers and create online engagement is endless.

To examine if there is a basic level of online presence and customer engagement with travellers, the CK assessment looked at:

Operator websites

facebook tripadvisor

Specifically, looking through "a visitor lens", the online assessment attempted to determine if these organizations were easily found online and if there was a level of engagement and conversation occurring with current, past or potential visitors (through blogs, customer posts, customer reviews/management responses and e-newsletter).

Business Sector	#	Website 65%	TripAdvisor 9%	Facebook 27%
Roofed Accommodations	64	67%	30%	20%
RV & Campgrounds	18	83%	NA	17%
Culture Based Assets	17	88%	6%	59%
Heritage Based	14	86%	36%	36%
Natural Assets/Trails	28	32%	NA	NA
Outdoor Activities	36	75%	3%	47%
Angling and Hunting	23	61%	0%	13%
Agri-Culinary Attractions	56	55%	2%	30%
Indoor Recreation	4	75%	0%	50%
Program Based	5	100%	0%	20%
Festivals and Events	22	55%	NA	25%

Note: This snapshot was completed in March 2015 and is based on the businesses and assets that were identified on the Tourism Asset Assessment Template at the time. Since then, some businesses have been added/deleted but those few changes would not have affected the overall picture regarding on-line engagement in CK.

Key Findings

- 65% of operators have a website BUT 35% don't, meaning they can't be found by visitors
- Participation on TripAdvisor, the number one travel resource in the world[40], is very weak.
- Facebook presence, while better than TripAdvisor, is also weak.
- Operators in CK are not utilizing valuable communication tools and low cost vehicles to engage visitors.

Asset Assessment Summary

Chatham-Kent, like many other rural communities in Ontario has an infrastructure-based tourism industry that relies heavily on undifferentiated tourism products with low emotion and engagement (e.g., lakes, trails and museums with static exhibits). More diversity with a range of visitor appeal and levels of engagement is needed.

The following summary captures the essence of CK's tourism assets. When presented to industry stakeholders during the Vision Sessions it resonated, and while there were questions about aspects of the assessment stakeholders unanimously agreed with the accuracy and relevance of the overview. An untapped opportunity lies in thematically weaving together Chatham-Kent's physical assets to experience a range of people, places, and special activities unique to Chatham-Kent through stories and visitor corridors that encourage travel between communities.

[40] 315 million unique monthly visitors, 70+ million TA members, 200+ million reviews and opinions, 115 million user contributions every minute. Source TripAdvisor

Sector	I A P	Critical Mass	Market Ready	Unique	Developed / Under-developed	Performing/ Under-Performing
Roofed Accommodation	64 - I	Yes	Almost	No	Und-dev	Und-perf
RV Parks/ Campgrounds	18 - I	No	Almost	No	Und-dev	Perf
Arts / Culture	17 - IP	No	Almost	No	Und-dev	Und-perf
Heritage	14 - IP	No	Almost	Yes	Und-dev	Und-perf
Natural Assets/Trails	28 - I	Yes	No	Almost	Und-dev	Und-perf
Outdoor Activities	36 - IA	Yes	No	No	Und-dev	Und-perf
Angling/Hunting	23 - AP	Yes	Almost	Yes	Dev	Und-perf
Retail	60 - I	Yes	No	No	Dev	Und-perf
F&B	198 - I	Yes	No	No	Dev	Und-perf
Agri-Tourism	54 - IA	Yes	Almost	No	Und-dev	Und-perf
Festivals / Events	25 - P	No	No	Almost	Und-dev	Und-perf

I = Infrastructure, A = Activities, P = Program/People

Unique Themes identified for Chatham-Kent

Through the TDMP process, a number of themes were identified as being unique to CK and differentiating tourism assets compared to other destinations. They include:

- Black History narrative and attractions
- Angling opportunities
- Classic Car / Automotive attractions
- First Nations and the War of 1812 narrative and attractions
- The Small Towns, Villages, Rural Landscapes found in CK
- Culture (Visual / Performing Arts)
- Agri / Culinary Tourism opportunities
- Meetings & Conventions

These assets have the potential to attract significant levels of tourism activity when fully developed. They also have appeal to specific “ideal guests” market segments.

The Cluster Tier table below illustrates three tiers of experience clusters.

Cluster Tier 1	Cluster Tier 2	Cluster Tier 3
Black History Narrative	First Nations/War of 1812	Small Towns, Villages and Rural Landscapes

Cluster Tier 1	Cluster Tier 2	Cluster Tier 3
Angling 🔴🔵🟡	Classic Car / Automotive 🔴🔵	Culture (Visual & Performing Arts) 🔴
Meetings and Conventions 🔴🔵🟡		Agri-Culinary Tourism 🔴

Legend

🔴	High potential for emotional engagement - High ROI / ROE
🔵	Unique to Chatham-Kent
🟡	Ready / Near Market-ready

The **first tier** contains assets that meet the following criteria:

- Have the greatest potential to engage specific visitors' emotionally;
- Generate a higher return on investment (ROI operator) and experience (ROE visitor);
- Offer experiences that are unique, only found in Chatham-Kent
- Are near tourism market-ready

The **second tier** assets meet the criteria too, but need more work in terms of tourism market-readiness.

The **third tier** assets have the potential to engage visitors, but need development to make these experiences unique enough to compete for ideal guests in the context of other destinations. They also require increased levels of tourism market readiness.

While each theme has the potential for narrative development, two themes emerged with the most immediate short-term promise based on existing product and operator-level engagement, these are:

- **Black History narrative and attractions**
- **Angling opportunities**

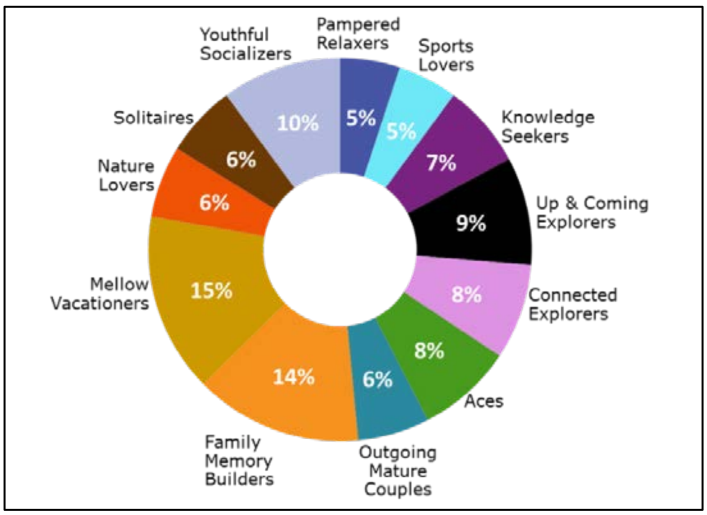
The assessment, as summarized here, will foster the TDMP process going forward. Recommendations pertaining to each of these levels are included in the Findings / Recommendation section.

9. Chatham-Kent's Ideal Guests

The desire of most destinations and operators is to understand their "ideal guests". Being able to accurately identify customers who, when prompted, will positively respond to the invitation to come and visit is the ultimate goal of tourism developers and / or marketers. Understanding the ideal guest within the context of CK's current tourism assets is critical in terms of positively impacting the goals of increasing tourism visitation and revenues. To help identify this valuable information, Ontario's tourism industry is utilizing a research based market segmentation resource. The Ontario Tourism Marketing Partnership Corporation (OTMPC) undertook a comprehensive visitor segmentation study in 2012[41], in partnership with the provinces 13 travel regions/RTOs.

The study identified 12 traveller types or segments based on the travel motivations and behaviors of domestic and US based travellers within an Ontario destination context (Figure 9). This work was done in order to help inform each RTO's decisions related to their tourism destination management process, including product/experience development and marketing.

Figure 9: Ontario's Market Segments



This information can also be a valuable tool for destinations and operators within a particular region and we have, therefore, utilized the province-wide segmentation study to help identify CK's ideal guests.

A thorough analysis of the visitor profiles for RTO1 was a key element in CK's strategy development process undertaken by the consultants. **This assessment and application to CK's tourism assets resulted in the identification of two primary visitor profiles or traveller types as CK's "ideal guests":**

- **Knowledge Seekers**
- **Connected Explorers**

[41] TNS. Consumer Insight Research Segmentation Overview. (2012). The research was conducted across Ontario, the main Quebec and Manitoba markets, as well as U.S. near and mid-markets. Conducted from April -June, 2012, primarily a mail survey of a representative cross-section of individuals 18 years or over was used, yielding 50,322 travelers, defined as individuals who took any out-of-town trips of one or more nights away from home for pleasure in the last 12 months. https://rto7.ca/Documents/Public/Documents/Consumer-Insight-Research-Segmentation-Overview

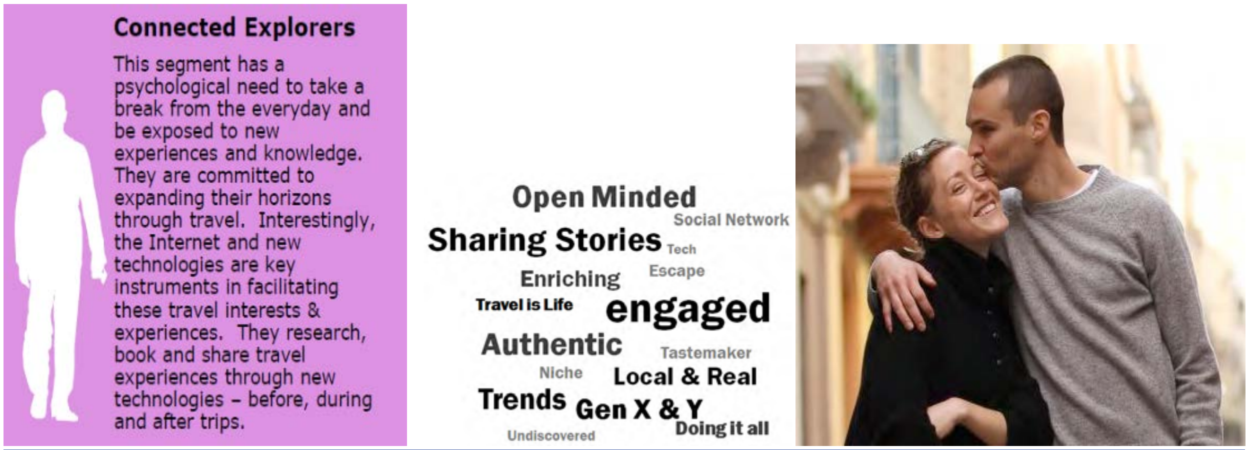
What follows is an overview of each traveller type. Consistent with the "demand side" thinking described earlier in the Plan, these traveller types and other relevant characteristics will be used as a basis or backdrop for CK's product / experience development and promotional activity. The specific traveller characteristics shape and prioritize development and promotion using CK's core tourism assets as a starting point. It also has application at both the municipal and operator level. In other words, tourism operators can look at their tourism offering and refine, modify or enhance it to have appeal to not only the typical traveller but also to these two specific traveller types.

CK Ideal Guest #1: Knowledge Seekers[42]

Knowledge Seekers	Segment	Key Differentiators	Activity Profile
• 11% of all Ontario travel spend • 33% between ages 35–54 • 54% 55 & older – above avg. • 56% / 46% female / male split • 54% couples no children • 57% employed • 32% retired • 44% university educated • Above avg. HH income $102,480 • 18% born outside Canada/US • 3.1 average trips past year • 8 average trip length (days) • Avg. party size per trip 2.7 • $1,386 avg. per person spend	• Couples in or nearing retirement • Time / money to enjoy themselves, travel is a part of this new lifestyle. • Looking to understand the places they visit, exposure to local customs. • Want to explore all aspects of history, art and culture. • Travel is about expanding their knowledge and stimulating the mind. • Self-describe as Knowledge Seekers	• 64% share travel experiences using social networks • 8 is the average number of activities on trips taken • 87% use the internet to plan • 77% read daily newspaper (68% print, 30% computer) • Watch /listen to news on TV (56%) /radio (49%)	• Museums, history, galleries, sightseeing and knowledge • Nature parks, scenic landmarks • Touring • Cultural events, festivals • Shopping • See or do something new and different

[42] RTO 1 Segmentation Study; TNS Research 2012, Ontario Ministry of Tourism, Culture and Sport.

CK Ideal Guest #2: Connected Explorers[43]



Connected Explorers	Segment	Key Differentiators	Activity Profile
• 12% of all Ontario travel spend • 44% between ages 18–34 • 41% between ages 35–54 • 45% couples with no children • 34% families with children under 18 • 77% employed • 47% university educated • Above average income $93,080 • 25% born outside Canada/US • 3.6 average trips per year • 5.8 average trip length (days) • Avg. party size per trip 2.8 • $862 avg. per person spend	• Psychological need to take a break from the everyday – relax and relieve stress • Want to renew personal connections on travel • Have a deep-seated need to travel and expose themselves to new experiences • Travel is about expanding horizons • Technology is a key part of travel. They use it at all phases of a trip, especially when sharing their travel experiences once back home	• 79% use smart phone/tablet when travelling • 90% share travel experiences using social networks • 10.2 is the average number of activities on trips taken • 95% use the internet • 78% read daily newspaper (51% print, 55% computer, 25% mobile) • Watch movies on TV (59%) / listen to morning radio (83%)	• 79% museums, history, galleries sightseeing & knowledge • 70% shopping • 69% culinary & wineries • 69% Botanical & nature parks, scenic landmarks • 56% touring

43 IBID

10. Chatham-Kent's TDMP – Findings and Recommendations

Recommendation Context

A number of factors impacted, or were contextual to the development of the specific TDMP recommendations. These factors were identified and validated throughout the industry-led TDMP consultation process and are critical to understanding a logical, coordinated and holistic approach to tourism destination management within a CK context. They included:

- The need for new thinking and a refreshed approach is appropriate;
- Recognition there is a genuine desire to grow tourism among tourism stakeholders;
- Collaboration will be a fundamental solution to the challenges faced;
- Desire for the municipality to serve as facilitators in partnership with industry;
- Clarity around roles and responsibilities is paramount;
- A review of municipal staff resources aligned with tourism activity is needed;
- A realignment of the municipal budget assigned to tourism activity is required;
- In the short term, tourism destination development is primary, while marketing is secondary;
- Key performance metrics must be established and monitored, and;
- Enhanced collaboration with SWOTC, when activities are aligned with CK's focus areas.

Roles and Responsibilities - Industry Led / Facilitated by the Municipality

The TDMP recommendations are the result of an industry-led tourism development process. At each step of the process, tourism stakeholders were engaged. By listening to these stakeholders, the consultants were able to apply their expertise and experience in tourism destination management to create CK's plan on behalf of tourism stakeholders and the municipality.

Role of the tourism industry: In order to be successful, those in the tourism industry—owners and operators, are responsible for developing and delivering compelling and appealing tourism experiences. It will be essential for industry stakeholders to understand and engage in the TDMP implementation steps if CK is to get to the next level of competitiveness and appeal.

Role of the Municipality: With a TDMP plan complete and a course charted, implementation and action will be a shared responsibility of the tourism industry and the municipality. In collaboration with TSAC, members of which are ultimately accountable for the TDMP's implementation, the municipality should take an active role in facilitating the implementation of the TDMP. The recommendations that follow clearly delineate who does what.

A Focused, Prioritized Approach

Recognizing that CK has a history in tourism development and promotion, we identified early on in the process that trying to be everything to everybody was not producing the desired results at any number of levels, including tourism industry engagement and return on investment. For this reason the ensuing recommendations are *focused, realistic and prioritized.*

The planning assumption is that a tiered approach is required. An approach that manages expectations and accepts the capability and capacity limitations in the near-term for industry and the municipality will be the most effective. Recommendations have adopted a phased approach and have been developed for the;

- Immediate term (~2016)
- Mid-term (~2017)
- Long-term (~2018–2020).

In addition, recommendations are grounded in three primary areas of focus;

- Industry Equipping / Workforce Development
- Product / Experience Development
- Marketing

How recommendations are presented:

A **Key Finding** is written as a statement of fact designed to capture the essence of an important discovery. Based on the analysis of quantitative information each key finding statement is followed by a brief summary description of the finding, then specific recommendations to address the finding.

Each **Recommendation** is preceded by a descriptor (**Bold**) that identifies whose role and responsibility it is for implementation of the recommendation.

Meetings & Conventions / CKCC: Background, Key Findings and Recommendations pertaining to the M&C market segment have been isolated for clarity and follow the initial set of leisure / tourism market recommendations.

Findings / Recommendations; Immediate-Term (~2016)

1. Key Finding:
The majority of tourism assets within CK are underdeveloped and therefore underperforming; there is the collective opportunity to provide various levels of industry equipping, from basic to more advanced, in order to enhance the overall tourism appeal of CK.

Recommendation:

Role / Responsibility: Municipality, TSAC, Stakeholders
Take a proactive role in facilitating and participating in tourism industry equipping / workforce development.

- Identify training needs in partnership with the TSAC then initiate a series of training / education activities that target tourism owner / operators located throughout the municipality.
- Tourism equipping involves creating opportunities to inform and educate operators on aspects specific to the tourism sector.
- Tourism market readiness training, tourism experience development and enhancing online presence are good examples of industry equipping.
- Workforce development includes training activities that are hard skill specific. Training related to customer service, technology/computer skills, marketing/public relations and finance are examples.
- Leverage the expertise of municipal staff and the Ontario Ministry of Tourism, Culture and Sport staff to deliver specific industry equipping training such as Tourism 101 – Fundamentals of Tourism Market Readiness, Tourism Business Plan Development, Product / Experience Development and Enhancing Online Presence is recommended.
- Leverage the services of local Chambers of Commerce, BIAs, Workforce Development Boards and others who offer and deliver workforce development activities and ensure CK's tourism operators are aware of and invited to these training initiatives.
- Given the key role the TSAC has in the implementation of the TDMP, it will be important to take steps to formalize this group through the development of an agreed upon Vision, Mission, Mandate and governance model. In 2016, it is recommended the TSAC meet quarterly given that focus will be directed toward subject-specific working groups.

Action:

- Consider implementing a tourism industry survey that is designed to benchmark and assess the tourism market readiness of CK's tourism stakeholders. If the survey could be repeated every two years the results could be used to gauge success and monitor uptake of industry equipping / workforce development initiatives.
- Given the expectations of the TSAC, formalize the role and membership of this group by creating a clear mandate against the backdrop of the TDMP, at the same time ensuring representatives are industry stakeholders who have a vested interest in advancing tourism, are experienced, and represent the region by sector and geography
- Identify and prioritize equipping / training topics to be implemented in 2016
- Give preference to enhancing / upgrading online presence of Black History and Angling operator websites by introducing a cost shared (municipality/operator) website enhancement program – details to be confirmed by municipality and the working groups
- Inventory existing training opportunities being delivered annually by other organizations; once complete, align these activities with CK's tourism industry needs.
- Identify a training model that maximizes participation of industry stakeholders recognizing that individuals learn in different ways; consider delivering:
    - Regional workshops that include many participants
    - Small group sessions (10-15 people) that are comprised of like-minded/sector-specific business clusters such as retailers, restaurateurs, and accommodators
    - Small group sessions (10-15 people) that are geographically or community based
    - One-on-one training that targets owner / operators who have a true desire to get to the next level of competitiveness and demonstrates a willingness and ability to improve
    - Webinars or other forms of online training; utilize the expertise of municipal IT staff and 3rd party industry experts to explore online training solutions that meet the needs of busy owner / operators

2016 Performance Metrics:

- Implement an industry survey by January 2016
- Identify a minimum of 6 training initiatives / topics by March 2016
- Deliver a minimum of 25 training sessions / opportunities by December 2016
- Register a minimum of 55 businesses / organizations for training by December 2016

2. Key Finding:
A focused and disciplined approach to destination management will require that resources be directed at developing and promoting a prioritized list of tourism asset clusters or themes that first; differentiate CK from other destinations and second; capitalize on higher levels of tourism market readiness. The list of clusters or themes will be expanded over the next 2 - 5 years. In 2016, the Black History narrative, angling opportunities and the M&C market (recommendations for M&C are included in the M&C section, page 64) will be the featured themes.

Recommendation:

Role / Responsibility: Black History and Angling Stakeholders, Municipality

Initiate intentional and focused strategies that concentrate on:

- Product / experience development, marketing of the Black History narrative
- Product / experience development, marketing of angling opportunities

Municipality to take steps to review allocation of staff resources and budgets to best facilitate this focused and disciplined approach to destination management.

Municipality to take steps to enhance the visitor experience through the implementation of visitor information services (online and on-site), and tourism way-finding solutions.

Action:

- Municipality to review allocation of resources:
  - Prioritize budget based on 2016 strategies
  - Review, evaluate and reallocate staff resources based on 2016 strategies
  - Close the highway 401 Visitor Information Centre while maintaining a working relationship with the RM Classic Car Museum
- Municipality facilitates the creation of working groups for each of the identified themes. Composition of the Black History group will be senior representatives of each of the Black History attractions and events as well as appropriate municipal areas that engage with these attractions e.g., culture and recreation. Composition of the angling group will be representatives of fishing charter operators, bait/tackle shops, marinas, tournament operators and outfitters / guides.
- Municipality works with each working group to create a Terms of Reference and Memorandum of Understanding (MOU). The MOU details the working relationship, expectations, roles / responsibilities and deliverables. Once agreed the working groups and municipality sign the MOU and work can commence.
- Municipality will facilitate a process with each group that utilizes the ideal guest profiles to identify the tourism product and experience opportunities and gaps present with each offering. Once complete, each group will develop a prioritized list of actions that address opportunities and gaps in the immediate term as well as those that will require more time, energy and resources to address.
- It is recommended that identified participants in each cluster participate in an Experience Development workshop (see Recommendation 1) to assist with identification of and solutions for the identified gaps and opportunities. Specific industry equipping will be

required beyond the workshop to ensure operators follow up on suggested enhancements to their individual offerings.

- With the knowledge of the opportunities and gaps, operators will be encouraged to leverage opportunities and address deficiencies as a group where applicable and / or at their own place of business. The goal is to have a confirmed list of tourism market ready operators to go to market in the summer of 2016.
- Utilizing the expertise of the municipality's in-house communications staff, and as required industry experts, and in partnership with each working group, a marketing strategy should be completed. Identified ideal guest profiles will drive marketing activities. Existing municipal budgets should be allocated to support each experience cluster.
- Municipality to enhance the existing municipal tourism website / landing page to feature the new tourism experience clusters and themes. Attention should be given to drive visitors to specific attraction / business websites to learn more and "close the sale". In order to enhance the online presence of tourism attractions introduce a cost sharing program (business / municipality) that encourages business owners to enhance their websites. Create funding formula, guidelines and intake parameters then proactively enlist business participation. Begin with those businesses featured in the 2016 themes.
- To provide on-the-ground travel counselling, investigate options for servicing visitors through traditional (e.g., hotels, B&Bs) and non-traditional (e.g., library locations, municipal offices) locations. Supplement this by working with Chambers and BIAs who also have opportunity to service visitors while they are in the respective communities.
- Create a simple CK tear-off map for use by tourism operators who, when asked, can provide guests with helpful driving directions to the sites and attractions found in CK
- Review the 2009 CK Tourism Signage Study to identify the relevant recommendations that would enhance the visitor experience. Take steps to implement these recommendations in the next ~24 months.

2016 Performance Metrics:

- Formation of two cluster working groups (Black History and Angling) and Terms of Reference, MOU signed for each cluster by February 2016
- Participation in Experience Development workshop (all stakeholders) with follow-up in fall 2015
- Identification of opportunities and gaps for each cluster and a list of prioritized actions to leverage opportunities and address gaps by April 2016
- Completion of the cooperative and compelling Black History narrative that includes at least three enhanced, purchasable, overnight visitor experiences by May 2016
- Completion of cooperative, compelling angling offers that include at least five enhanced, purchasable and overnight visitor experiences May 2016
- Enhanced landing page on the existing municipal tourism website that features new experience clusters / themes by May 2016
- Enhanced online presence of owner / operator tourism businesses, based on ideal guest profiles, and specifically Black History and angling attractions / businesses by May 2016
- Execution of a targeted marketing program designed to direct visitors to the relevant or featured attractions / suppliers who are tourism market ready and can close the sale, May – October 2017

3. Key Finding:
As the Provincial Regional Tourism Organization representing Southwest Ontario and the Chatham-Kent tourism stakeholders, SWOTC presents ongoing and annual opportunities for collaboration and partnership. Tourism stakeholders, along with the municipality, could enhance involvement and partnership in SWOTC related activities and events, while recognizing that SWOTC's chosen product / market segments are not currently aligned with CK's priorities.

Recommendation:

Role / Responsibility: Stakeholder, Municipality, SWOTC, OTMPC
Proactively engage with SWOTC to understand and leverage the product development, sales and marketing opportunities they offer within the context of CK's tourism development, marketing and sales priorities. Where alignment is not present, evaluate each opportunity and when it makes sense to the TSAC take steps to be a proactive partner. Solicit SWOTC's cooperation to support the tourism destination management efforts of CK's tourism industry, specifically to enhance and promote CK's identified experience clusters (Black History, angling, M&C in 2016 and others in future years).

Action:

- Municipality and stakeholders continue to be proactively engaged in SWOTC activities and events.
- Municipality along with select representatives of the TSAC meet with senior staff at OTMPC and SWOTC and present the CK TDMP to secure understanding of the actions CK's tourism stakeholders and the municipality will be taking in the immediate term to improve CK's tourism competitiveness and appeal.
- Industry stakeholders to ensure they have representation on SWOTC Board and committees. Leverage past Board member relationships to broker this tactic.

2016 Performance Metrics:

- Municipal staff to conduct semi-annual (at minimum) information exchange meetings in CK with OTMPC and SWOTC senior staff
- CK tourism (municipality) to participate in at least 2 SWOTC partnership events or activities

FINDINGS / RECOMMENDATIONS; MID-TERM: (~2017)

4. Key Finding:
As stated in the 2016 findings and recommendations, a majority of tourism assets within CK are underdeveloped and therefore underperforming. While industry equipping / workforce development activities are initiated in 2016, these activities must continue in 2017 to engage an ever-growing list of tourism stakeholders. There is an opportunity to evaluate the 2016 activity and repeat the current programs and / or create new industry equipping / workforce development initiatives. This must be an annual activity as it will continue to contribute to the overall tourism appeal of the CK.

Recommendation:

Role / Responsibility: Municipality, TSAC, Stakeholders

Continue to take a proactive role in facilitating and participating in tourism industry equipping / workforce development. Evaluate training initiated in 2016 and affirm if existing programming should be repeated to engage more stakeholders or if new programs should be introduced. Monitor training needs in partnership with the TSAC and continue to initiate a series of training / education activities that target tourism owner / operators located throughout the municipality.

Action:

- Municipality and TSAC to evaluate 2016 training activities and success rates and modify 2017 activities as needed.
- Municipality to continue to introduce new training models or to implement models that may not have been implemented in 2016. Consideration should be given to introduce, in partnership with Chambers and BIAs Local Host training in order to enthusiastically welcome those who travel to CK, for example for the 2018 International Plowing Match (RTO 6, in partnership with Humber College delivered such training for the Pan Am Games, CK could use this model / material.)
- Municipality to continue to leverage existing training activities implemented by others, and taking place with the municipality, as well as facilitate the delivery of training to more industry stakeholders.
- Municipal staff to work with communications expert, if not something that can be implemented internally, to explore the creation of an industry newsletter that semi-annually promotes training initiatives and recognizes and celebrates those businesses that have enhanced their business as a result of specific training.

2017 Performance Metrics:

- Deliver a minimum of 25 training sessions / opportunities
- Register a minimum of 75 businesses / organizations
- Create and deliver a minimum of two industry newsletters annually

5. Key Finding:
The same focused and disciplined approach to destination management introduced in 2016 continues in 2017. The approach still requires that resources be directed at developing and promoting the prioritized list of tourism asset clusters or themes that differentiate CK from other destinations and capitalize on higher levels of tourism market readiness. As identified in the 2016 recommendation, the list of clusters or themes will be expanded over the next 2 - 5 years. In 2017, the First Nations/War of 1812 and Classic Car / Automotive narratives will be the featured themes.

Recommendation:

Role /Responsibility: First Nations/War of 1812, Classic Car/Automotive Stakeholders, Municipality

Based on success of the product / experience development initiatives undertaken in 2016 initiate intentional and focused strategies that concentrate on:

- Product / experience development, marketing of the First Nations/War of 1812 narrative
- Product / experience development, marketing of Classic Car / Automotive opportunities

Action:

- Municipality and TSAC evaluate the success of the 2016 product / experience development process and modify the 2017 process as needed to enhance effectiveness.
- Municipality facilitates the creation of working groups for each of the identified themes. Composition of the First Nations / 1812 group are senior representatives of each of the First Nations communities as well as the municipal culture area who engage with these communities. Composition of the Classic Car / Automotive group are senior representatives from RM Classic Car Museum, the six automotive centric events, the race tracks and any other identified by those involved in these experiences.
- Municipality works with each working group to create a Terms of Reference and Memorandum of Understanding (MOU). The MOU details the working relationship, expectations, roles / responsibilities and deliverables. Once agreed the working groups and municipality sign the MOU and work can commence.
- Municipality will facilitate a process with each group that utilizes the ideal guest profiles to identify the tourism product and experience opportunities and gaps present with each offering. Once complete each group will develop a prioritized list of actions that address opportunities and gaps in the immediate term as well as those that will require more time, energy and resources to address.
- It is recommended that identified participants in each cluster participate in an Experience Development workshop (see 2016 Recommendation 1) to assist with identification of and solutions for the identified gaps and opportunities. Specific industry equipping will be required beyond the workshop to ensure operators follow up on suggested enhancements to their individual offerings.
- With the knowledge of the opportunities and gaps operators involved in each cluster will be encouraged to leverage opportunities and address deficiencies as a group where applicable and / or at their own place of business. The goal is to have a confirmed list of tourism market-ready experiences to go to market in the summer of 2017.
- To enhance the online presence of tourism attractions continue the cost sharing program (business / municipality) that encourages business owners to enhance their website. Launch the next intake criteria and funding guidelines then proactively enlist business owner participation. Give priority to businesses featured in the 2017 themes.

- Utilizing municipal and/or external marketing and communications experts and working in partnership with the working groups, a marketing strategy will be completed. Identified ideal guest profiles will drive marketing activities. Existing municipal budgets will be allocated to support each experience cluster.

2017 Performance Metrics:

- Formation of two cluster working groups (First Nations / 1812, Classic Car / Automotive) and Terms of Reference, MOU signed for each cluster
- Participation in Experience Development workshop (all stakeholders) with follow-up
- Identification of opportunities and gaps for each cluster and a list of prioritized actions to leverage opportunities and address gaps
- Completion of the compelling First Nations/1812 narrative that includes 1 enhanced, purchasable, overnight visitor experience
- Completion of cooperative, compelling Classic / Automotive offers that include at least 3 enhanced, purchasable, overnight visitor experiences
- Enhanced online presence of owner / operator tourism businesses, based on ideal guest profiles, and specifically First Nations / 1812 and Classic car / Automotive themes
- Introduce these new tourism experiences on the NEW “Official CK Tourism Website”
- Execution of a targeted marketing program designed to direct visitors to the relevant or featured attractions / suppliers who are tourism market ready and can close the sale

6. Key Finding:
CK’s online tourism presence; at present CK and its tourism stakeholders have been utilizing tourism pages on the CK municipal website. This section of the site presents CK’s tourism assets and attractions to the travelling public. While this online presence has served the destination well during the transition phase (over the period when the TDMP was being created), this online vehicle is inadequate if CK is to get to the next level of tourism competitiveness and appeal. With the launch of the TDMP in 2015 and the ensuing activities and initiatives introduced in 2016, CK will be in a position in 2017 to strengthen its tourism online presence with the creation of a municipally owned and operated tourism website; the “Official Tourism Website of Chatham-Kent”. This is a stand-alone, dynamic, visitor-centric site NOT visibly connected (from the visitor’s perspective) to the municipal site.

Recommendation:

Role / Responsibility: Municipality, TSAC, Tourism Website Task Force

Create a NEW CK Tourism website that is owned and managed by the municipality and designed to meet the needs of CK’s “Ideal Guests” (Leisure, M&C). The site must:

- List / link tourism services / businesses to the customer; essential support, in terms of website content will be needed from tourism stakeholders
- Drive customer to owner / operators to provide relevant information and close the sale

Action:

- Municipality, in partnership with the TSAC, to establish a Tourism Website Task Force
- Composition of the task force is “marketing oriented / experienced” tourism stakeholders and tourism staff
- Task Force to identify the criteria / attributes / goals of CK’s “Official” tourism website

- Task Force to develop, in collaboration with municipal tourism and purchasing staff a Request for Proposal to secure a 3rd party website developer / resource / firm to undertake the development of the CK tourism website
- Retain a website developer by January 2017 and launch the tourism website in April 2017

2017 Performance Metrics:

- Formation of a website task force
- Identification of website criteria / attributes / goals
- Retain a website developer by January 2017
- Launch of CK's official tourism website in April of 2017

Key Findings / Recommendations; Long-Term ~2018 – 2020

Realistically, identifying recommendations for 2018 – 2020 are reliant on several realities that include, but are not limited to, changing marketplace dynamics, success with strategies developed and implemented 2016 – 2018 and ultimately the ROI generated to tourism owner / operators and the municipality. Therefore, in the absence of understanding 2018 realities the directions here are presented here given market conditions, TDMP success dynamics and 2016–2017 performance metrics be in line with the expectations of both the TSAC and the municipality.

7. Key Finding:
Should the identified tourism performance metrics be met in 2016 and 2017, and tourism to and within CK is growing and economic indicators are positive, remaining competitive will be incumbent upon the growth of resources allocated to tourism development and marketing. In this case, the municipality should consider increasing allocated resources for the development and promotion of its tourism sector.

Recommendation:

Role / Responsibility: Municipality, TSAC
Undertake an assessment of activities connected to the TDMP and determine if success has been achieved or where attention is required. Collectively make decisions related to ongoing municipal support of tourism activities and ideally secure additional resources to take CK to a new level of tourism competitiveness and appeal.

Action:

- Consider securing the expertise of an experienced tourism consultant to assist with a 3rd party evaluation of CK's 2016–2018 TDMP activities. Have the consultant prepare and deliver an evaluation and recommended actions related to ongoing municipal investments.
- Based on the results of the evaluation, take the necessary steps to reduce, maintain or grow the municipal investment in tourism development and promotion.

2018–2020 Performance Metrics:

- Make recommendations and secure decisions related to municipal investments for tourism development and promotion

8. Key Finding:
As market dynamics evolve and tourism stakeholders come and go, industry equipping / workforce development activities will always be a requirement if CK is to remain competitive. This must be an annual activity as it will continue to contribute to the overall tourism appeal of CK.

Recommendation:

Role / Responsibility: Municipality, TSAC, Stakeholders
Continue to take a proactive role in facilitating and participating in tourism industry equipping / workforce development. Annually evaluate training initiatives and affirm if existing programming

should be repeated to engage more stakeholders or if new programs should be introduced. Monitor training needs in partnership with the TSAC and continue to initiate annual training / education activities that target tourism owner / operators located throughout the municipality.
Action:

- In 2018 implement Wave II of a tourism industry survey designed to evaluate and assess the tourism market readiness of CK's tourism stakeholders. This is the second wave of a stakeholder survey introduced in 2016. Results will be used to gauge success and monitor uptake of industry equipping / workforce development initiatives.
- Municipality to continue to facilitate the introduction of new training models.
- Municipality to continue to leverage existing training activities implemented by others that take place with the municipality, as well as facilitate the delivery of training to more industry stakeholders.
- Municipality to continue to produce an industry newsletter that semi-annually promotes training initiatives and recognizes and celebrates those businesses that have enhanced their business as a result of specific training.

2018–2020 Performance Metrics:

- Deliver a minimum of 50 training sessions / opportunities
- Register a minimum of 150 businesses / organizations

9. Key Finding:
The focused and disciplined approach to destination management introduced in 2016 and continued in 2017 should continue. This strategy requires that resources be directed at developing and promoting the prioritized list of tourism asset clusters or themes that differentiate CK from other destinations and capitalize on enhanced and growing levels of tourism market readiness. As identified in the 2016 recommendation, the list of clusters or themes will be expanded over the next 2 - 5 years. In 2018, support development and marketing of CK's current and future core attractors will include in order of priority:

- Small Towns, Villages, Rural Landscapes
- Culture (Visual / Performing Arts)
- Agri / Culinary Tourism

Recommendation:

Role / Responsibility: Cluster Stakeholders, Municipality
Based on success of the product / experience development initiatives undertaken in 2016 and 2017 initiate intentional and focused strategies that concentrate on:

- Product / experience development, marketing of Small Towns, Villages, Rural Landscapes opportunities
- Product / experience development, marketing of Culture (Visual / Performing Arts) opportunities
- Product / experience development, marketing of Agri / Culinary Tourism opportunities

Action:

- Municipality and the TSAC evaluate the success of the 2016 and 2017 product / experience development process and modify the 2018+ process as needed to enhance effectiveness.
- Municipality facilitates the creation of working groups for each of the identified themes.

- Municipality works with each working group to create a Terms of Reference and Memorandum of Understanding (MOU). The MOU details the working relationship, expectations, roles / responsibilities and deliverables. Once agreed the working groups and municipality sign the MOU and work can commence.
- Municipality will facilitate a process with each group that utilizes the ideal guest profiles to identify the tourism product and experience opportunities and gaps present with each offering. Once complete each group will develop a prioritized list of actions that address opportunities and gaps in the immediate term as well as those that will require more time, energy and resources to address.
- It is recommended that identified participants in each cluster participate in an Experience Development workshop to assist with identification of and solutions for the identified gaps and opportunities. Specific industry equipping will be required beyond the workshop to ensure operators follow up on suggested enhancements to their individual offerings.
- With the knowledge of the opportunities and gaps, operators involved in each cluster will be encouraged to leverage opportunities and address deficiencies as a group where applicable and / or at their own place of business. The goal is to have a confirmed list of tourism market-ready experiences in the summer of 2018.
- Utilizing the expertise of municipal and other marketing and communications professionals and in partnership with the working group, complete a marketing strategy. Identified ideal guest profiles will drive marketing activities. Existing municipal budgets will be allocated to support each experience cluster.

2018 – 2020 Performance Metrics:

- Formation of three cluster working groups and Terms of Reference, MOU signed for each cluster
- Participation in Experience Development workshop (all stakeholders) with follow-up
- Identification of opportunities and gaps for each cluster and a list of prioritized actions to leverage opportunities and address gaps
- Completion of the compelling narratives and experiences that include three enhanced, purchasable, overnight visitor experiences
- Introduce these new tourism experiences on the “Official CK Tourism Website”
- Execution of a targeted marketing program designed to direct visitors to the relevant or featured attractions / suppliers who are tourism market ready and can close the sale

Meetings & Conventions / JD Bradley Convention Centre Recommendations

Recommendations pertaining to the meetings market and the John D. Bradley Chatham-Kent Convention Centre (CKCC) are presented here in order to maximize understanding in the context of CK's TDMP. Supporting detail on the M&C market is included in Appendix 4.

Recommendations have been prepared by a Brain Trust third party resource. Doreen Ashton Wagner, Greenfield Services Inc. specializes in the Canadian and US Meeting and Conventions (M&C) market sector.

Recommendations

Securing M&C business in the current Canadian economy is a process that requires tenacity and resources. As a "new" M&C destination, CK has been reasonably well represented by the CKCC. The CKCC has helped draw attention to the region, and has secured M&C business in a highly competitive market, with few resources when compared to the closest competitive destinations.

But the CKCC cannot continue to be the only M&C flag-bearer for CK. With the revitalization of tourism efforts through the TDMP, there is an opportunity to grow the volume of M&C business with renewed and informed marketing and sales strategies. These include:

1. A Reality Check and Moving Forward as a Community

In our scan of Chatham-Kent's assets and activities, we came across an underlying belief within the community at large that the CKCC ought to be producing more M&C business by now. This quite likely resulted from the feasibility study carried out prior to construction that provided an overly optimistic target figure for economic impact. Unfortunately, between the dates the study was carried out and when the Centre opened, the M&C business climate changed making the economic case unrealistic. Booking M&C business is simply not a case of "Build and They Will Come." The CKCC is an attractive facility, but its mere existence does not mean M&C business will flow.

Therefore, it is suggested a collective "reality check" is needed. M&C business is built over time, requires resources and more players at the table. The reality is that all successful M&C destinations first adopt a "team sell approach."

Secondly, there is the opportunity to create an **M&C Working Group**, an idea welcomed and by the CKCC. This group, led and facilitated by the CKCC will bring together hotel owners or managers in closest proximity to the CKCC and those that stand to derive the most benefit from the CKCC's success in attracting non-local M&C business. The Working Group should include stakeholders from ancillary services as well, such as audio-visual, décor and entertainment companies.

Role of the CKCC Working Group:

- **Education:** Sensitization of the impact of M&C to the community. This is especially important for the creation of an "ambassador program" (see below), as well as the ongoing education of the local hospitality community on the evolving needs of the M&C market.

- **Standards:** Establish success benchmarks for the fulfillment of M&C activities. These ranges from establishing acceptable protocols for responding to M&C inquiries, ensuring suppliers "speak M&C" and use language and materials specific to the M&C market, to mechanisms for realistically evaluating potential leads before actively pursuing the business.
- **Product Development:** The creation of standards will identify gaps where new products or services can be developed. This could be done in conjunction with the TSAC.
- **Marketing Strategy Oversight:** The group helps guide the sales and marketing efforts of the CKCC and CK Tourism as its M&C program unfolds. This includes validating proposed tactics of the CKCC and accessing opportunities in a collaborative manner, making suggestions where appropriate.
- **Destination Sales:** The group participates in sales activities by providing a team of sales professionals who are familiar with CK and its tourism assets, and following the lead of the CKCC, attend industry trade shows, and organize and participate in FAMS for example.

2. Focus on Areas of Strength

It is understood M&C groups for the most part, choose their meeting location based on a natural draw or link to an area. To be successful, CK's M&C efforts should focus on individuals, organizations and industries that are already based in the region.

This means the creation of a substantial and exhaustive database:

- The Ambassadors: Who are the community leaders with ties to outside organizations that can bring an M&C group to Chatham-Kent? Who are the "movers and shakers"? Recognizing the creation of such a list and strategies to mobilize this group was attempted in the past, supported by an advertising campaign that included a presence in local Tim Horton's outlets, online media, movie theatre messaging and other print advertising support unfortunately these efforts were not as successful as hoped.
- It is unfortunate people did not understand the objective behind this endeavour; however it is recommended that the effort be revisited and fine-tuned. Recognizing that CKCC sales staff have reached out to community leaders continuing those efforts and taking a more personal, grassroots approach could be beneficial. The list will include every organizational leader, president or board member of local service clubs (Legion, Lions, Rotary, etc.); along with every school principal, business owner, head of a government service bureau, etc.
- Special attention should be given to young entrepreneurs and anyone who might be involved in new businesses. This effort can go further by identifying Chatham-Kent's famous alumni? Who are the sons and daughters who have moved away to Toronto and become leaders of organizations there? Could they influence M&C business to come to the area? With a personal approach, verbal permission can be obtained to communicate via email, in compliance with CASL rules. From there, a regular communication program can be initiated to convey the importance of the M&C market to the local community, and ask for introductions to M&C organizers, influencers and decision makers. (e.g., the President of the local Lions Club makes an introduction, extends an invitation and then is involved in an effort to bring a divisional or Ontario Lions Club meeting to CK).
- The Business Magnets: agriculture is a critical anchor for the Chatham-Kent economy. The CKCC staff has mined this sector effectively as there have been numerous meetings at the CKCC and at area hotels involving agricultural organizations. But has every agricultural organization been included in solicitation effort? What about clients or suppliers of those agricultural groups, could they be added to the list?

- What other organizations are growing in Chatham-Kent? Union Gas is an important player, and financial services and insurance companies have shown meeting activity. Identifying who else might have a natural inclination to bring a meeting to the area because of a connection will be beneficial. It may be because they have clients, prospects or members in the Chatham-Kent area, or their suppliers or partners are located there. Systematic harvesting of contacts also should include asking for names of decision-makers located outside the area, likely in the GTA.
- The economic development department of the municipality, along with the Chambers of Commerce, should continue to be close partners of the M&C Working Group, "feeding" company names and contacts against the backdrop of this renewed TDMP process.
- Essential to this strategy is the housing of this information in a central, robust database or Customer Relationship Management (CRM) system. We understand that CKCC currently has such a tool however it may not be the most effective. The need to house, manage and mine data throughout the sales process in this competitive marketplace cannot be understated.

3. Look at Different Meetings

Focusing sales and marketing attention on traditional M&C business is unrealistic. This marketplace is too competitive and because CK does not have the adequate infrastructure and services to meet the needs of traditional M&C business, it does not make sense for CK to be competing with the bigger, more developed destinations for traditional conventions.

For this reason, we question participation in activities with organizations such as MPI or CSAE; while these industry associations offer great education, the networking opportunities they provide just doesn't include Chatham-Kent's customers and prospects. And with the exception of some events that are open to members only, it would be more economical to attend select events at non-member rates.

The focus for Chatham-Kent and the CKCC should only include sports, competitive arts, and the SMERF (Social, Military, Education, Religious, and Fraternal) groups. Not all sports will be suitable for the CKCC; but those indoor sports such as judo, gymnastics, badminton, etc. may present opportunities.

Competitive arts have been a somewhat successful niche for the CKCC. Dance, Glee Club and even improvisational comedy competitions can be an excellent clientele for Chatham-Kent to develop. SMERF represents a similar opportunity. In all three areas, the lead likely will come from an Ambassador contact, or through proactive online research. The only caveat is to ensure that there is a natural link or enough of a local connection to make a case for a group to come to Chatham-Kent.

4. Keeping Tabs on the Competition

No matter how happy a group is in a particular destination, they will eventually want to try something new, or at least shop elsewhere to see if they have the best possible deal. This is where actively monitoring groups that meet in competitive cities can be a rich source of leads.

Since most public groups post notices of meetings and events on their website, regular online research will produce an attractive prospect list. Just putting "London Ontario conference registration," for instance in Google, pulls up half a dozen potential leads in the first few pages alone, including a conference on power generation, one for pork producers, and another for the Archives Association of Ontario. Not all will be a suitable fit, depending on the group's space needs, but it may be likely that if a group is going to London, they could eventually come to Chatham-Kent. We recommend that ongoing competitive research to keep an eye on business in London, Windsor, and Sarnia (in that order) be an integral part of Chatham-Kent's M&C development plan going forward.

5. Enhancing What We've Got

- A More Compelling Online Presence: Meeting planners tell us they customarily look for information on new destinations first by Googling the name of a destination, with the word "tourism". This poses a challenge for Chatham-Kent because the area is not as well-known as its closest competitors. In addition, and most importantly, its tourism information is located within the municipal site. This likely deserves a more detailed discussion focused on Chatham-Kent's overall digital strategy, and whether in fact CK tourism should be represented by a stand-alone site. But isolating the issue to just the M&C segment means information is hard to find.
- Regardless, the information should be optimized for mobile devices, and should be more search-driven. Currently listings for M&C locations are available in a PDF. This is lovely publication, but it is no longer suitable for a market which is increasingly mobile. Looking at a PDF on a smartphone is just not user-friendly. Beyond the bricks and mortar, more information should be provided on "Why Chatham-Kent?" Statistics about key industries, larger employers, population, etc., which are available elsewhere on the Chatham-Kent site, should be re-purposed for the group / M&C section.
- Making Choices About the Players: It would appear that Chatham-Kent's strategy for the M&C market has been to inventory and present ALL available meeting places in the region, from the CKCC to arenas and community centres. To the eyes of a seasoned M&C planner, this looks like the region is trying to make up for its lack of true meeting space by throwing in everything it's got, “supply side thinking”. This is a good way to get dismissed as a viable M&C destination.
- It would be better to identify the true M&C players and focus on highlighting those with testimonials and references to past meetings and events that have taken place there. This may not be a politically palatable direction, but it is one that makes more business sense.
- The other venues can still be included, but not necessarily under an M&C umbrella. Their reference can be useful for special events and other SMERF gatherings that would gladly use community-based venues because they are less expensive. In all cases, it would be useful to include a dynamic mapping tool so that organizers can better view locations and distance between venues.
- Getting Proper Tools to Leverage Sales Efforts: The CKCC has had outside sales representation in the marketplace for some time, and this is an important component of success. But in our view the organization has not had the proper tools to get the most out of the sales process. Recommendation #2 discussed the creation of a database. This is more than creating a list. We are advocating the need for a proper Customer Relationship Management (CRM) tool that not only can house a list, but can manage the communication process with prospects, assigning segmentation and business potential ratings. There are plenty of cloud-based tools that are affordable and flexible, allowing for the monitoring of sales activity and pipeline management. These tools have plug-ins to manage email permissions, the distribution of email newsletters and setting of reminders for example.
- The use of an online tool is essential for the continuity of sales activity when there are staff changes.

- As was mentioned previously, lead nurturing is an essential part of the sales reality. This entails the creation and regular dissemination of useful information designed to educate and engage clients and prospects. This content should not be written in a promotional fashion, but rather crafted to subtly highlight Chatham-Kent's attributes, providing general information to help potential M&C clients save time, effort and money in their planning process. A content marketing editorial line-up for Chatham-Kent could include:
    - Articles on past meetings or conferences that have taken place at CKCC, with photos of the event and quotes from organizers, showcasing any unique themes, menu items or activities;
    - Downloadable lists of team building activities, taking in some of the area's natural attributes and man-made attractions;
    - Profiles of local ambassadors and the types of meetings/events they have been involved with in the area.

In conclusion, the strategies provided above are intended to refocus M&C efforts on basic marketing and sales elements, ensuring that resources, time and effort are spent in areas where the biggest impact can be made.

11. Appendices

Appendix 1

TDMP Working Group Members

Lucy Ogletree	Chair TSAC and Owner / Operator, Harvest Moon, Dresden
Susanne Spence-Wilkins	Co-Chair, TSAC and Owner / Operator, The Crazy Eight Barn, Palmyra
Dave Barnier	Owner / Operator Erieau Marina
Dave Benson	Tecumseh Parkway / Heritage
John Urban	Owner / Operator Cellar Door Wines, Wheatley
Lesley Grand	General Manager, St. Clair College Capitol Theatre
Pete Tsirimbis	General Manager, The Chilled Cork / Retro Suites, Chatham
Shannon Prince	Curator, Buxton National Historic Site & Museum / Black History

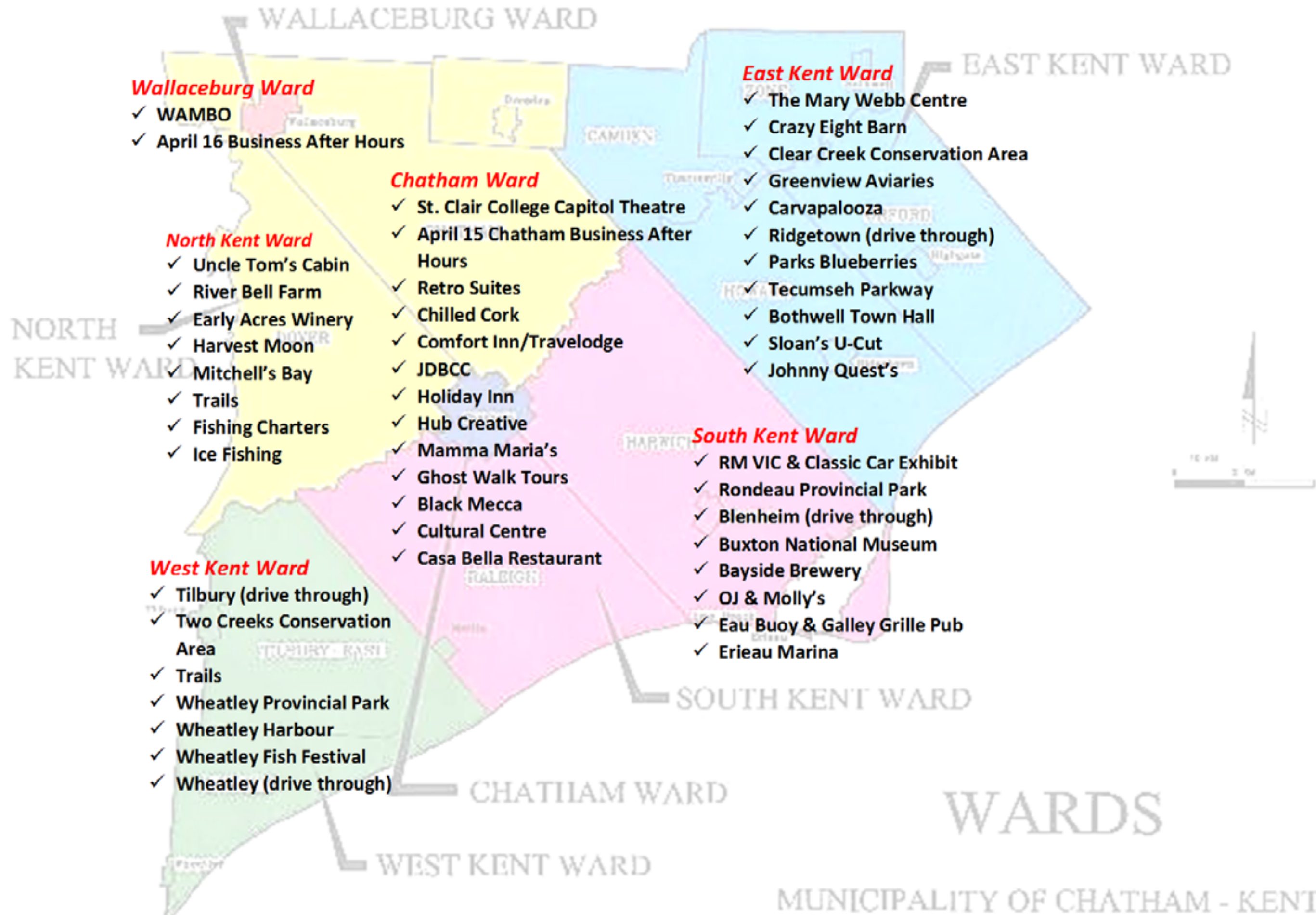
Tourism Stakeholders Advisory Council Members

Lucy Ogletree	Chair TSAC , Harvest Moon, Dresden
Susanne Spence-Wilkins	Co-Chair, TSAC, Crazy Eight Barn, Palmyra
Sheila Bateman	Travelodge
Kathy Cottingham	Tilbury
Karen Debergh	Wallaceburg
Jaclyn Gillier	Downtown Chatham Centre
Lesley Grand	General Manager, St. Clair College Capitol Theatre
Janet Jones	Ontario Ministry Tourism, Culture and Sport
Shannon Prince	Curator, Buxton National Historic Site & Museum
Marlee Robinson	Ridgetown, Porches & Verandahs
Kathy Smyth	Tilbury, Bed & Breakfast
Pete Tsirimbis	General Manager, The Chilled Cork / Retro Suites, Chatham
Mary Anne Udvari	Agriculture
Sarah Wagenaar	J.D. Bradley Convention Centre

Appendix 2 – Reports, Plans, and Studies reviewed included;

1. CK Studies, Plans & Strategies
2. CK Branding Toolkit
3. Trails Master Plan
4. Tecumseh Park Master Plan
5. Library Master Plan
6. Parks & Recreation Master Plan
7. Chatham Cultural Centre Master Plan
8. Cultural Plan Implementation Project
9. Cultural Plan for Chatham-Kent
10. Service Sustainability Review Process (SSRP) PHASE III: Economic Development –Tourism
11. Tourism Destination Management Plan
12. Communities in Bloom Profile Book
13. CK Trail Map
14. SWOTC / Chatham-Kent Culinary Project & Recommendations (C. Houle Consult)
15. LORD Report for the Buxton National Historic Site Enhancements
16. Several documents from stakeholders

Appendix 3 – List of Stakeholders Engaged in the TDMP process



Appendix 4 – M&C Market Background

Considerations in M&C Site Selection

The economic impact associated with M&C activity is a great metric to measure, but it is also important to consider why meetings take place in one location versus another? To give an added layer of nuance to this discussion, and to identify why one destination may be more desirable than another, it is important to explore the over-arching factors involved in the M&C decision-making process.

A number of researchers and organizations have studied the numerous attributes that attract organizers to a particular destination or venue for a business event. Aside from the expected conditions—such as the availability of suitable space over desired date—in Greenfield's research[44] with Ontario meeting planners, we have consistently heard the following considerations:

- **Local Champion / Reason to Visit**: Increasingly planners are looking at a destination's affinity for a particular group. For corporate groups, this may mean having a core group of clients, employees or suppliers located in a particular area. For an association or a non-profit group meeting, this could be having enough members or prospective members, or the destination is in a central location for a significant portion of the membership. Non-profit groups also report looking for a strong local champion who will advocate for the incoming group, acting as a conference chair.
- **Convenience and Cost:** Once there is a compelling reason for a group to consider a particular destination, convenience and cost will be evaluated. In a time-starved world, convenience may carry more weight than pure cost; with planners opting for ease of access for the convenience of delegates, even though it may cost a little more.
- **Rotation:** The need to cover different parts of a geographic territory seems to be less prevalent in the site selection equation than it used to, but it is still a factor for membership-based organizations. For an Ontario-based association, bylaws or even tradition might mandate that the organization hold every other annual general meeting outside the GTA, rotating between Northern, Eastern and Southwestern Ontario.
- **Destination Appeal:** The general "tourist appeal" is most important for groups where meeting attendance is optional (as is often the case with a professional association) or where an attendee might choose to go because they find the destination appealing for personal time. This is where a perfectly sound destination, with the appropriate meeting space, accommodation and price structure will lose to a destination that offers better dining, entertainment and activities.

Trends Impacting the M&C Market Segment

Having covered past industry performance and discussed the factors that influence the site selection process, it is important to also examine trends which affect the nature of the relationship with a given destination or venue, as well as the channels through which buying decisions are made. Meeting Professionals International, Amex, the Professional Convention Management Association, Meetings & Incentive Travel Magazine and Ignite provide excellent sources of such information. For the purposes of this report, we note the following trends:

[44] Greenfield Services Inc. contacts meeting planners of all types on a regular basis as a result of the lead generation work they do for national hotel chains, convention centres and destinations.

- **Shorter Booking Windows:** Economic uncertainty and the increasing pace of business in general has condensed the lead time during which business meeting decisions are made. Hotel managers report more online inquiries, through services like Cvent (a meetings site selection and planning software program), and more fickle customer patterns where space is held tentatively, but date and capacity changes take place before it is confirmed.
- **Fragmentation of Meetings:** Since the last economic recession, corporations have been reducing the length of their staff meetings, and regionalizing their meetings into smaller gatherings. This was in part to reduce cost and minimize time spent away from the office for employees. This trend is now being emulated by the association sector. This in part is good news for smaller destinations, because there could be more small meetings to attract. Conversely, it poses challenges since larger, more established destinations also court this smaller business since there are fewer large meetings to utilize their space.
- **Mobile and Connected:** As with tourism in general, if a venue or service is not online with a properly optimized mobile site and information that appeals to the target market, it will be ignored by meeting planners.
- **Highly Competitive Space:** The increasing use of “alternative” venues – museums, art galleries, even cinemas – has been identified as a growing international trend (Amex research). This is in part because hotel and convention centre space is often found to be expensive and unimaginative, but also because these traditional facilities often put significant restrictions in their contracts, such as catering revenue minimums and cancellation fees.
- **Site Selection Intermediaries:** While many end users are using publicly available online site selection tools, just as many are turning to professional site selection firms. In Canada the “big names” in this area include Helms-Briscoe, ConferenceDirect, Strategic Site Selection, Meeting Encore Group and The Howes Group. According to some DMOs and hotel management groups, these intermediaries are exerting an increasing amount of influence, channelling as much as 40% of all M&C bookings today.
- **Increasing Complexity of the Sales and Marketing Cycle:** One last trend mystifying many Canadian M&C suppliers is the diversity of sales and marketing channels that are required to “cut through” to attract business event planners. Courting the M&C market used to be relatively easy: advertise in publications, attend tradeshows, conduct some Familiarization Tours (FAMs) and make lots of outgoing prospecting calls. Those were the ingredients of a successful approach. No longer is it that easy. Like all business-to-business markets, the sales and marketing cycle is now much more complex.

In addition to a mobile M&C-optimized website, at a minimum, any given venue or destination now also needs to have a content marketing strategy, a presence on social media, a data-driven sales strategy with an updated database (housed in a functional and flexible customer relationship management tool), and lead nurturing program. That’s on top of the traditional mechanisms already mentioned… It’s a tall order!

Such general market conditions, decision frameworks and trends set the stage for our discussion of Chatham-Kent’s current positioning in the M&C marketplace, and what it will take to make a mark in the future.

Chatham-Kent's Meeting & Event Assets

From our review of the various meeting and event venues in Chatham-Kent, the single most compelling and logical M&C asset is the CKCC. As a purpose-built facility, it is the most "M&C-ready" in the region, with a product and services that appeal to event organizers, supported by communication that "speaks" to this market.

The CKCC is only one facility however, and has its limitations such as limited break-out space for larger groups and a relatively small number of hotel guestrooms connected or within easy walking distance. Recognizing today's meeting organizers and participants are driven by convenience, looking for accommodation within a particular meeting complex or close by is paramount. Long driving distances, no matter how attractive the accommodation, is often seen as a deterrent.

When looking at the other facilities in the region, we see that the hotels offering group accommodation in the area surrounding the CKCC are small and mostly in the budget category. Holiday Inn, Comfort Inn and Travelodge are respected brands, but they are not known for their appeal to the M&C market. In this highly competitive environment, the lack of bigger, more upscale brand hotels is an obstacle that meeting planners and their attendees have difficulty overlooking.

There is also the issue of quality within this budget category. We found that, based on normal group block assignments, only 100 rooms could be considered M&C-ready; that is accommodation with décor and appointments that are current, with services and amenities that cater to today's mobile business sector. There are more rooms nearby and while they may be acceptable to some travellers meeting delegates would not be satisfied. This limits the type of groups that would be attracted to the area.

The CKCC has larger meeting space, suitable for plenary meetings or exhibitions and the venue has other types of meeting space like breakout rooms and a board room. With the exception of the Retro Suites Hotel, which offers banquet space to accommodate up to 140 guests, its guestroom-to-meeting-space ratio far exceeds its 33 suites. Other area hotels have only small, perfunctory meeting rooms suitable for 10–20 attendees. A search for alternative meeting space yields listings for space in arenas and community centres, along with a few venues suitable for special events such as the Armoury of Chatham and the Chatham-Kent Cultural Centre. Overall, however, nothing is present that would have substantial appeal for medium size meetings or business events that require break-out space.

Assessment of Meeting & Conference/Business Event Marketing Activities

Meeting planners search for facilities online. Looking at CK's hospitality and tourism sites, there is little that communicates appeal to business event organizers. The CKCC does communicate its meeting and event space; some of the hotels list meeting space and amenities on their websites, but there is really little that "speaks" to M&C professionals on any of those pages. It would appear that the hotels may not be as proactive as the CKCC in selling CK as a meetings destination.

An environmental scan of the hospitality operators in the Chatham-Kent area indicates that almost all M&C proactive sales activities are performed by CKCC staff. They are the ones who exhibit at meeting and event tradeshows (IncentiveWorks in Toronto), and attend meetings and industry events such as Meeting Professionals International (Toronto Chapter) and the

Canadian Society of Association Executives (Trillium Chapter). Area hotels and venues answer M&C inquiries, but they do not appear to actively sell or promote to this segment on their own.

If the area depends on the CKCC to generate the bulk of M&C inquiries, then the effort needs to be more strategic and supported with the right tools. As it stands, the sales and marketing activities at the CKCC are spread too thinly across too broad a spectrum of industries and client types, with no means to nurture any leads with a systematic approach.

Competitive Positioning

Chatham-Kent is at a significant disadvantage when compared with other municipalities in Southwestern Ontario. London and Windsor have been in the M&C marketplace for decades, and Sarnia has been active for some time. Aside from larger, flexible convention facilities, the first two cities have very active DMOs. London for instance has in-market sales representatives in both Toronto and Ottawa. Windsor has a formidable M&C powerhouse and deep pockets in Caesars Windsor.

Both cities have defined their teams of hotel, special event, and transportation partners who support the M&C effort. In addition, they understand that meeting planners look beyond the availability of hotel rooms and meeting space, and are swayed by the tourist appeal of a destination. The result is that when a meeting organizer needs to organize a meeting Southwest of the GTA, it is easy to gravitate to London or Windsor, to the detriment of the area in between, namely Chatham-Kent.