A photograph of a person with long blonde hair, seen from behind, walking through a vineyard. The vines are mostly bare, with some autumn-colored leaves remaining. In the background, there is a dense forest with trees showing vibrant autumn foliage in shades of yellow, orange, and red. The sky is overcast.

NORTH GRENVILLE TOURISM STRATEGY

DECEMBER 2020





GREEN GABLES WINERY

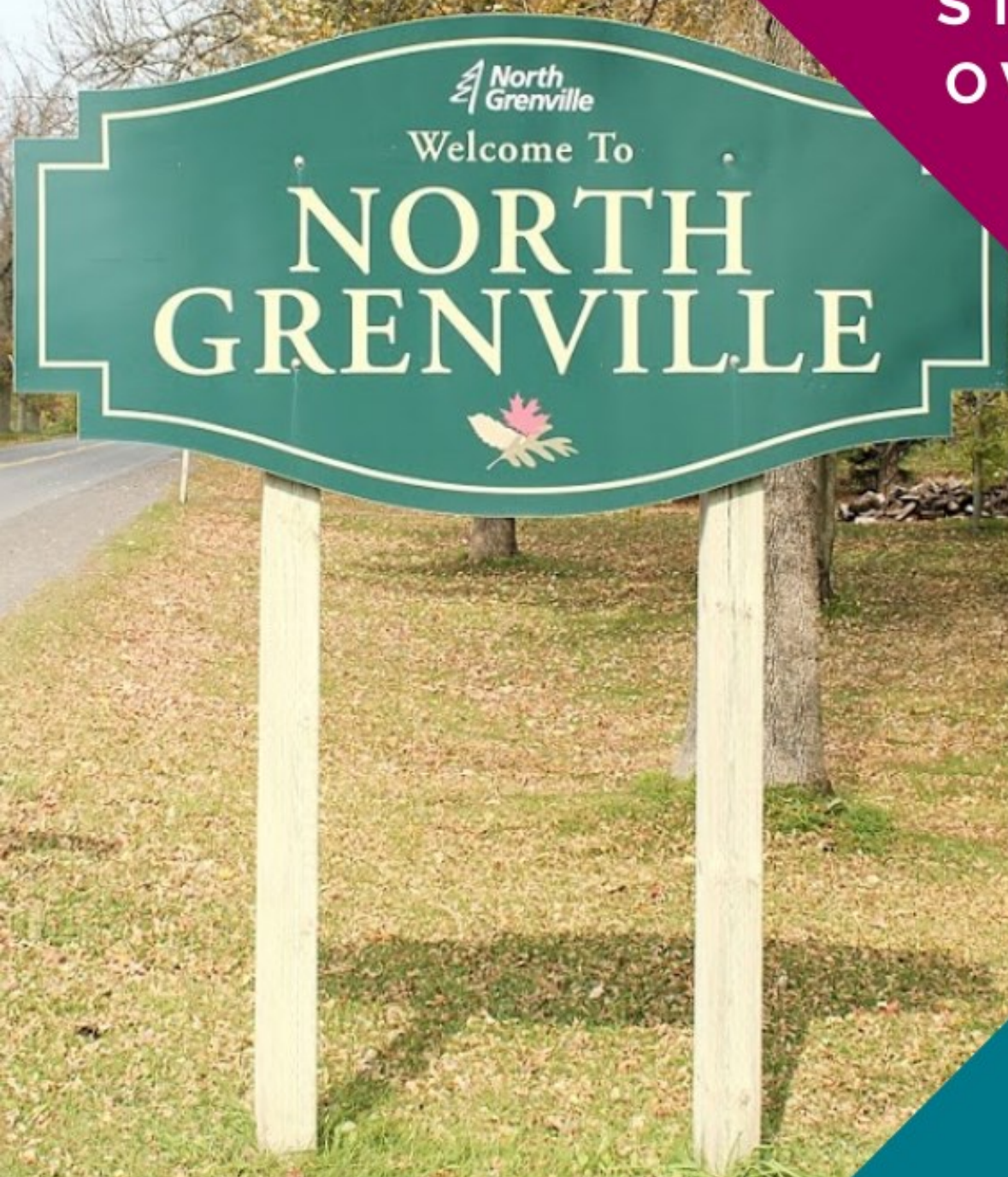


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1

STRATEGY OVERVIEW



Prepared By:
MDB Insight



North Grenville Tourism Strategy

Tourism has taken a significant hit during the Covid-19 pandemic, and communities around the world have adjusted their approaches to service delivery and target markets. The tourism sector in Canada has changed dramatically in recent months – and in some subsectors, has experienced outright collapse. But tourism industry experts are confident it will bounce back quickly when confidence returns to consumer travel intentions. The first tourism market to see recovery will be the domestic market. That’s why now is the opportune time for North Grenville to adopt a tourism strategy.

Following a deep dive into background reports and statistical analysis, along with consultations with tourism businesses and residents, a plan for developing and promoting tourism in North Grenville has emerged. This tourism strategy builds upon the assets that the area is blessed with, seeks inspiration from the positive aspirations of citizens and entrepreneurs, and leverages the cooperative nature of the community to reimagine a future of prosperity.

The Municipality of North Grenville is eager to advance an aggressive plan for tourism development, so the usual executive summary at the top of reports such as this has been replaced by a headlong, enthusiastic outline of key recommendations. More details and rationale are to be found in the sections that follow.

Vision for Tourism

A fun place matched with your welcoming hosts
=
your best day and night.

We are what we are, and you’ll love your visit.

Tourism Mission

The Municipality of North Grenville demonstrates leadership and supports its businesses and community groups to marshal the assets, infrastructure, administrative capacity, programs, and financial resources to develop and promote the local tourism industry.

Tourism Guiding Principles

- Aspire to be that place where people always enjoy themselves
- Work together to be better than before
- Unite under the flag that sells the area most effectively

Tourism Strategic Priorities

- Collaborate with business operators and others to build strong, reliable, unique tourism draws
- Brand the destination as current, innovative, curious, generous, and family-oriented
- Leverage existing assets as backdrops for high-yield, high-value experiences for tourists and locals



Strategic Priority: Collaborate to build strong, reliable, unique tourism draws

Action 1: Shape and support the tourism industry

Guiding Principle: Work together to be better than before.

Rationale: Compared to the centres of tourism power and control, North Grenville sits in the hinterland around an impressive gallery of competitive forces vying for tourism dollars in Eastern Ontario. It exists at the edge of its Regional Tourism Organization (RTO) and abuts two other RTOs, meaning North Grenville will need to take charge of its tourism destiny. The Municipality is compact enough for a staff member to efficiently cover the territory while providing beneficial support to businesses. North Grenville is also embarking on changes to its Community Improvement Plan (CIP). With the right incentives in place for both the public realm and private sectors, the Municipality is well-positioned to shape the look of tourism here in the not-so-distant future.

What can happen now: The business community is eager to explore opportunities related to the visitor economy and any community revitalisation that may be generated as a result. This tourism strategy is evidence that North Grenville's Municipal Council is supportive. This positive attitude and a collegial atmosphere are definite advantages for the community, compared to others who are not as organised. Now is the time to take advantage of the moment and move forward.

- Step 1a: Aggressive tourism product development
- Step 1b: Leading-edge incentives

Figure 1: Memorial statue, Kemptville Library

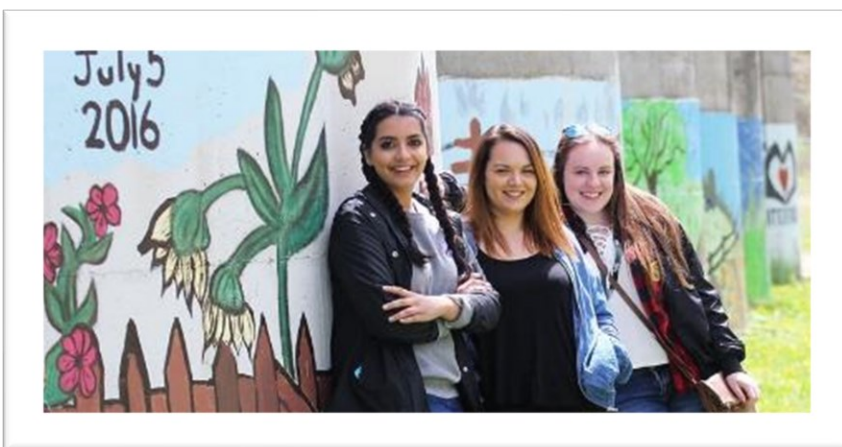




Step 1a: Aggressively pursue tourism product development

- Approve the North Grenville Tourism Strategy and associated budget requirements
- Hire a Tourism Development Coordinator to help the tourism industry of Kemptville and North Grenville prepare to be market-ready for tourists by assembling excellent experiences and guaranteed quality customer service before marketing is scaled up.
 - More details are outlined in the section of the strategy about Tourism Service Delivery.
- Focus on regular communication and engagement of tourism business owners, even when the business does not acknowledge they serve visitors.
- Organise regular visits to and networking sessions for businesses, as well as value-driven learning workshops to spur improvements in business practices and partnerships.
- Develop stories and profiles of businesses, events, people, North Grenville products and experiences, one of the values of having tourism experts on staff.
- Ensure ongoing maintenance of quality photography and video libraries, integrating stories and images on websites and social media channels.
- Set up familiarisation tours for business owners, customer service staff, community leaders, champions, and ambassadors, including study tours of other communities to learn from.
- Gather ideas and nurture partnerships by participating in tourism conferences and associations, including the Ontario Tourism Summit, Economic Developers Council of Ontario, OMAFRA workshops, and RTO and United Counties initiatives.
- Hire summer staff (see Figure 2) for a variety of tasks, such as helping businesses correct their listings on Google, TripAdvisor, and other platforms that are necessary to broaden their appeal.

Figure 2: Norfolk County's Visitor Services Program summer staff

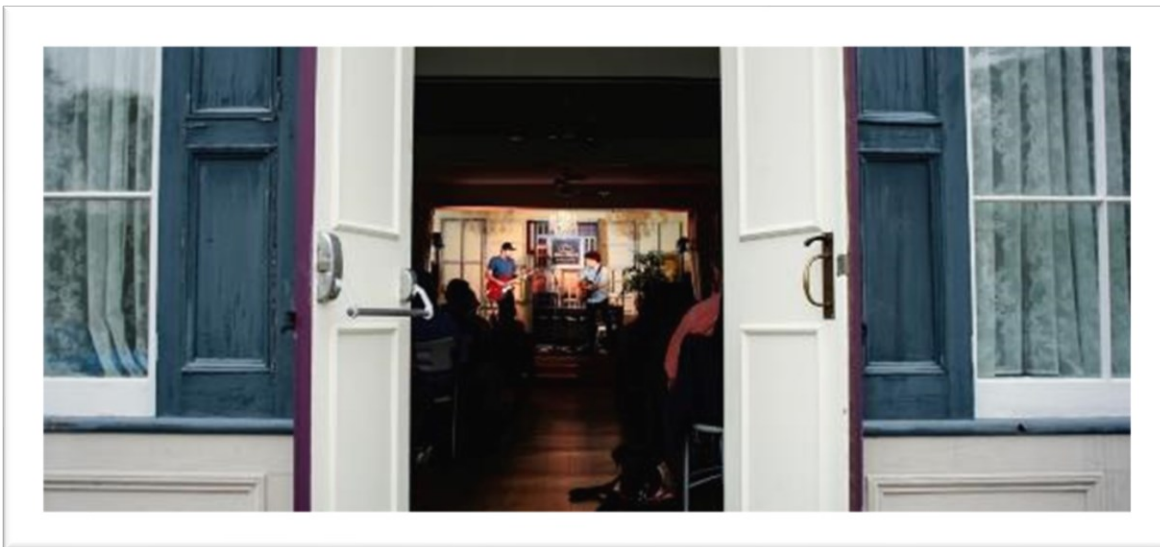




Step 1b: Implement leading-edge incentives

- Activate best-in-class public-realm projects.
 - Examples: Boardwalk along Kemptville Creek, public art, murals, live artists, buskers and other street performers, spaces for pop-up vendors and food carts, special event grants for concerts in small halls (Figure 3).
- Install public wi-fi internet with secure connectivity. Tourists want to access the web while travelling because they are reviewing restaurants, finding directions, loading maps, and sharing positive reviews.
 - Priority locations: Downtown Kemptville, Kemptville Campus, Ferguson Forest Dog Park, Anniversary Park, Burritt's Rapids, in front of hotels, and other destinations.
- Formulate leading-edge Community Improvement Plan incentives for small businesses, moving beyond façade improvement and signage grants.
 - Examples: facilities and building improvement grants for farm-based experiences, accessibility retrofit grants for downtown merchants, landscaping projects, grants for unique tourist accommodation experiences.
- **Case Studies:**
 - Agricultural facilities improvement grants, Norfolk County, Ontario
 - Commercial Roofed Accommodations and Value-Added Agricultural Development Tax-Increment Grant, Haldimand County, Ontario
 - Tourism Accommodations Real Property Tax Rebate Program, Nova Scotia.

Figure 3: Concert at Burritts Rapids Community Hall





Strategic Priority:

Leverage existing assets as backdrops for high-yield, high-value tourism experiences

Action 2:

Fast-track development of tourism experiences on Kemptville Campus

Guiding Principle: Aspire to be that place where people always enjoy themselves.

Rationale: The Kemptville Campus Master Plan (Figure 4) encourages a variety of innovative concepts (performing arts events, festivals, eco, and agri-tourism initiatives, aerial parks, etc.), but most monetised tourism-related experiences are positioned as long-term objectives. These recommendations need to be accelerated as short-term priorities. The Master Plan proposes identifying potential agri-business and agri-tourism partners to operate ‘the Farm’ (see “brandscape” identified in Figure 4). The Master Plan also proposes that eco-tourism operators program and manage suitable tourism operations that integrate into ‘the Forest’ and ‘the Wetland.’ Discussions are proposed with Kemptville Live to identify other festivals/tourism promotions on ‘the Lawn.’

What can happen now: Kemptville Campus is zoned Institutional, so several tourism-related uses are currently allowed: charitable camp, conservation uses, fairground, mobile canteen, museum or art gallery, place of assembly, public campground, public or private park, playground, picnicking area, playing field, recreational trail, bandstand, skating rink, recreation uses, accessory retail uses, accessory eating establishments, accessory accommodations, among others.

- Step 2a: Experience Kemptville
- Step 2b: Savour Kemptville
- Step 2c: Camp Kemptville
- Step 2d: Kemptville Events



Figure 4: Artist's Concept: Kemptville Campus Master Plan





Step 2a: Experience Kemptville

- Establish a Tourism Advisory Committee to collaborate with the Kemptville Campus Board of Directors to pilot monetised tourism experiences on Kemptville Campus.
- Develop bookable experiences related to authentic local product and stories
- Explore one-of-a-kind learning trip ideas using local assets already located on Kemptville Campus
 - Examples: Greenhouse workshops (Figure 5), forestry management, agricultural professional development, companion animal services, exotic pet workshops.
- **Case Studies:**
 - Cornell University Maple Syrup Production Workshop and Farm Tour, Horseheads, New York
 - Eden Project, Cornwall, U.K.

Examples of Bookable Experiences

Sugar bush experiences and tours

Home gardening classes

Wellness learning opportunities

Fitness experiences

Opportunities for multi-day experiences tied to local overnight accommodation

Figure 5: Herb Gardening Workshop, Singapore Botanic Gardens





Step 2b: Savour Kemptville

- Engage local farmers, chefs, and food and beverage purveyors to expand food and drink experiences at Kemptville Campus
- Develop year-round food trail itineraries that connect restaurants and seasonal farmgate retail locations across North Grenville.
- Leverage the state-of-the-art maple syrup production facility at the Kemptville Agroforestry Centre to promote Kemptville as the closest maple destination to the Nation's Capital, expanding to year-round activities networked with other maple locations for events, including Maplewood Park and Maplewood Hall.
- **Case Studies:**
 - From the Farm Cooking School, Prince Edward County
 - Collingwood Cooking Academy, Blue Mountains
 - Eat & Drink Norfolk, Norfolk County
 - New York State Food & Culinary Centre (Figure 6), Canandaigua, New York

Examples of Bookable Experiences:

Harvest dinners

Local food culinary classes

Meet the farmer/chef talks

Food canning and preserving

Figure 6: Food Demonstration Theatre, New York State Wine & Culinary Center





Step 2c: Camp Kemptville

- Convert the former student residence on Kemptville Campus as tourist accommodation, connecting on-site experiences to overnight stays.
- Install cabins, safari-tent glamping opportunities, and campsites on Kemptville Campus.
- **Case Studies:**
 - Apple Pond Farm and Renewable Education Centre, Callicoon Centre, New York
 - Long Point Eco-Adventures, Norfolk County
 - DéfiPlanet, Dienné, France (Figure 7)
 - JuneBug Retro Resort, Weaverville, South Carolina

Figure 7: Treehouse Cabins, DéfiPlanet, France





Step 2d: Kemptville Events

- Collaborate with organisers of Kemptville Live and other promoters to develop live music and other outdoor concerts on Kemptville Campus.
- Connect larger events directly to concurrent downtown Kemptville street festivals, featuring local food and drink.
- **Case Studies:**
 - Gentlemen of the Road Stopovers (Mumford & Sons), worldwide.
 - ConcertsInYourCar.com

Figure 8: Korean Music Drive-In Festival





Action 3:

Expand development of monetised outdoor experiences

Guiding Principle: Aspire to be that place where people always enjoy themselves.

Rationale: Part of the joy of living in Eastern Ontario is the accessibility of outdoor experiences. With consumers feeling penned in their dwellings during the pandemic, nature is a mental health respite that will not be forgotten when Covid-19 passes. North Grenville is located on the Rideau Canal World Heritage Site and boasts an enviable collection of outdoor recreation assets such as the Rideau Woodland Ramble, Ferguson Forest, Limerick Forest, trails, and waterways. Kemptville Creek (a.k.a. South Branch of the Rideau River) can handle motorised leisure craft to the downtown core, as well as canoes and kayaks deep into North Grenville, as far as Bishop's Mills. Drifters Outdoor Canoe & Kayak Rentals is a highly regarded outfitter based in Kemptville, operating seasonally (see Figure 5). Le Boat is the largest self-drive boating operator in Europe and North America, with a fleet of 24 houseboats based in Smiths Falls. Le Boat's possible expansion would open the northern Rideau to Ottawa, with a possible third base of operations in North Grenville.

What can happen now: Canal and river depths allow for the expansion of Le Boat facilities in North Grenville. Kayak and paddleboard enthusiasts may continue to use the waterways in increasing numbers. The Rideau Woodland Ramble offers an excellent example of monetised outdoor experiences. In other parts of North Grenville, tour guides can be encouraged to operate interpreted tours in many parks and on trails.

- Step 3a: Inspire outfitters and guides
- Step 3b: Celebrate the water
- Step 3c: Expand self-drive houseboat operations

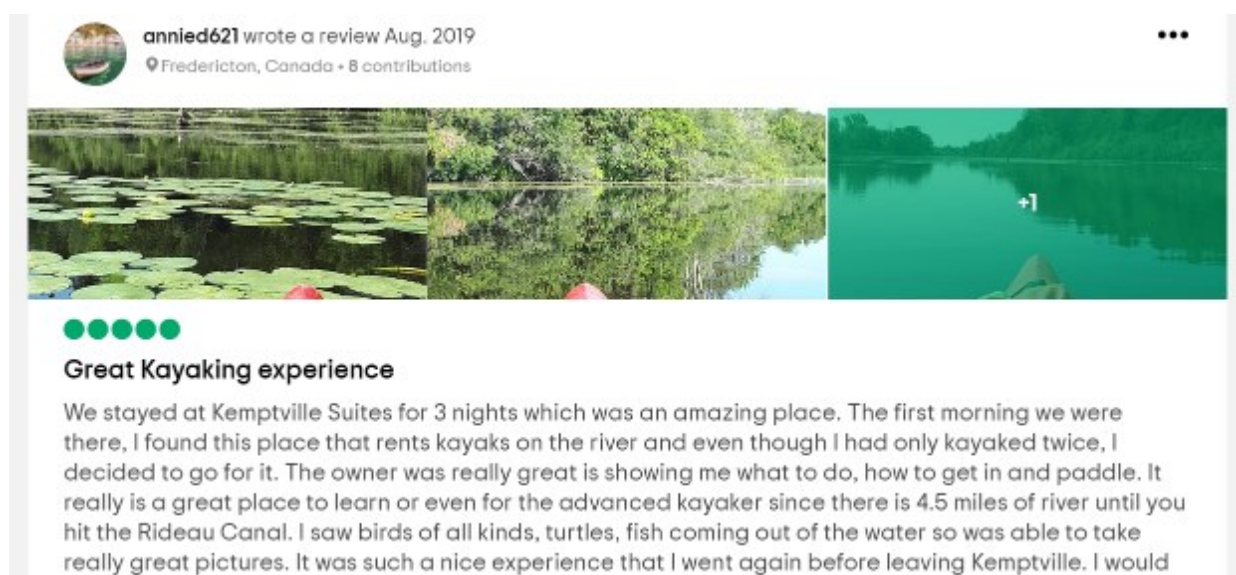




Step 3a: Inspire outfitters and guides

- Encourage entrepreneurs to establish guided tourism experiences on water and land year-round.
- Focus on high-yield experiences: soft adventure (Figure 9), nature-identification hikes, wellness sessions, fishing expeditions, wild mushroom/herb foraging, paddling training, etc.
- **Case Studies:**
 - Puck's Plenty Foraging, Stratford
 - BAER Kayak Fishing Adventures, Norfolk County
 - Canadian Tree Tours, Toronto
 - Mont-Tremblant Snowshoe Tours and Rental, Quebec
 - Ottawa River Guided Fishing Ice Bungalows, Rockland, Ontario
 - Park Rx America

Figure 9: Review of Drifters Outdoors Canoe & Kayak Rentals





Step 3b: Celebrate the water

- Decorate North Grenville's waterways year-round with lighting effects, floral plantings, public art.
- Organise unique festivals and events along Kemptville Creek, tied to shops and restaurants in downtown Kemptville. Focus on local food, culture, and history.
 - Examples: competitive lantern festival, ice-sculpture event in winter.
- Plan a Rideau Canal Bicentennial Party for 2026-2032, commemorating 200 years since the start and end of construction.
- **Case Studies:**
 - Jinju Lantern Festival, Japan (Figure 10)
 - Dorchester BridgeFest, Middlesex County, Ontario
 - Simcoe Christmas Panorama River of Lights, Norfolk County

Figure 10: Jinju Lantern Festival, Namgang River, South Korea

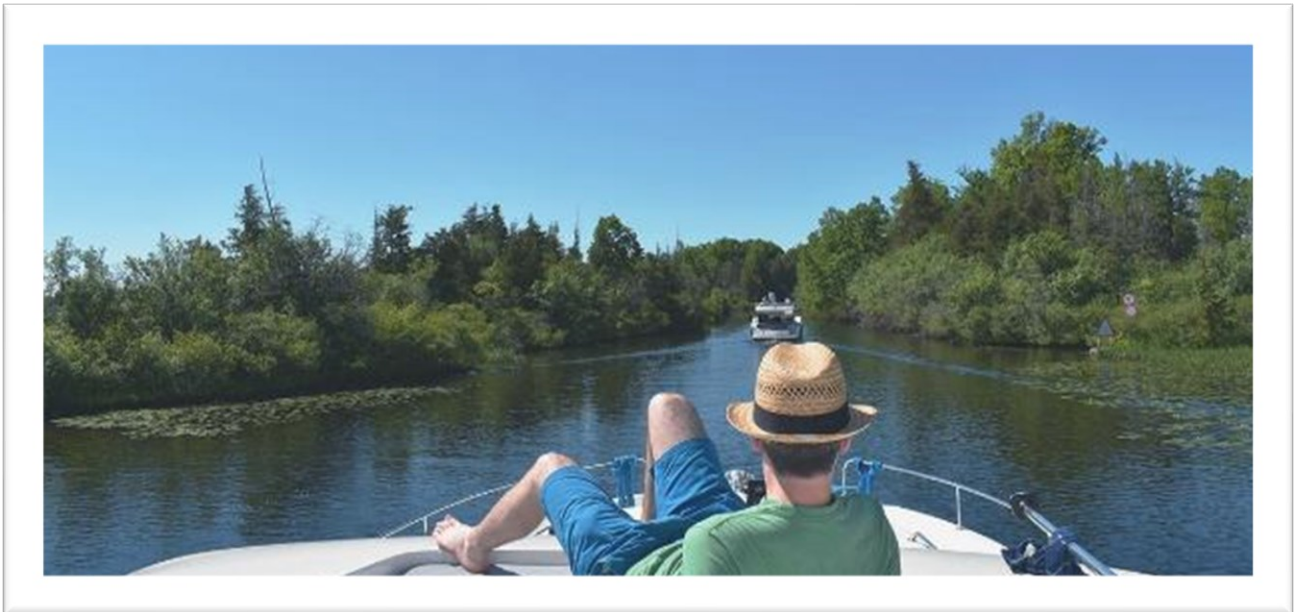




Step 3c: Expand self-drive houseboat operations

- Work with Le Boat to expand its operations in North Grenville.
- Connect Le Boat's base in North Grenville with other businesses and attractions to maximise the spinoff benefits.
- Collaborate with destinations along the northern Rideau to ensure guests' experience is very memorable.

Figure 11: Le Boat Canal Boat Rentals





Strategic Priority: Brand the destination as current, innovative, curious, generous, and family-oriented

Action 4:

Be the place that owns 'fit,' 'sweet,' and 'lit'

Guiding Principle: Unite under the flag that sells the area most effectively.

Rationale: For decades, Kemptville attracted young college students full of ideas and energy. North Grenville has the fastest-growing young adult population in the United Counties of Leeds and Grenville, with daily active connections to like-minded colleagues and friends in Ottawa via workplaces and social media. By cultivating a youthful vibe, North Grenville will attract younger demographics, as well as those who still believe they are young. So, let other communities cater to the ageing demographic, the Grey Hairs. In Merrickville, you can sip Afternoon Tea. In Kemptville, you can enjoy an Afternoon Blonde. (Belgian ale, that is.)

What can happen now: Compared to other small towns its size, Kemptville has a satisfactory young social scene and the beginnings of a nightlife, with a café and a few restaurants that cater to the twenty and thirty-something demographic already. North Grenville's outdoor assets provide numerous opportunities to create experiences that highlight fitness, wellness, self-care, meditation, and nature therapy. Turn the creativity and brainstorming up a notch. Pull some young people with objective views about the area around a table (or some Zoom calls) and ask them what they want to see in Kemptville.

- Step 4a: Understand your target customer and fulfil their desires
- Step 4b: Differentiate and innovate

Figure 12: Band playing at South Branch Bistro





Step 4a: Understand your target customers and fulfil their desires

- Understand what Kemptville and North Grenville have to offer a younger affluent demographic.
- Challenge business owners to provide new experiences, using today's authentic experiences and assets, and find ways to build upon them.
- Concentrate on youth demographics with the money, time, respect for your community, and the motivation to travel. These young people enjoy a run or jog on your trails, a paddle on your waterways, cool learning experiences, and a glass of wine in your restaurants.
- Use marketing and social media channels popular among the targeted demographic and engage visitors regularly.
 - Examples: Instagram, Snapchat, and YouTube are popular among younger demographics. Facebook, Twitter, and Pinterest are social media channels for the young at heart.

Figure 13: Sample of young demographic





Step 4b: Experiment, innovate and differentiate

- Stay a step ahead of the same-old-same-old and position the destination's brand as something truly unique. During the consultation, the community expressed a sincere willingness to experiment.
 - Examples: Fringe sports on Kemptville Campus, such as drone races, cricket, quidditch. Dog and jog marathons through the trails of Ferguson Forest (see Figure 14). Paddleboard races on Kemptville Creek. Esports, disc golf, tchoukball, and ice stock are other examples.

Figure 14: Dog-friendly marathon in Fargo, North Dakota





Action 5:

Brand the tourism destination as Kemptville

Rationale: ‘Where do you live?’ ‘North Grenville.’ ‘Where’s that?’ ‘Have you heard of Kemptville?’ ‘Yes!’ Selling a tourism destination is expensive. Using a brand that is unknown or confusing is poor marketing (and a waste of money), especially if an established brand is at hand. Kemptville is a very well-known name. In fact, the first use of the name Kemptville happened almost two centuries ago. The Kemptville Agricultural College was known across Ontario for more than 100 years.

What can happen now: Any outcomes of promoting Kemptville will be shared with the whole Municipality’s tourism industry, from farms to hamlets. Tourists naturally like to explore the areas around the destination.

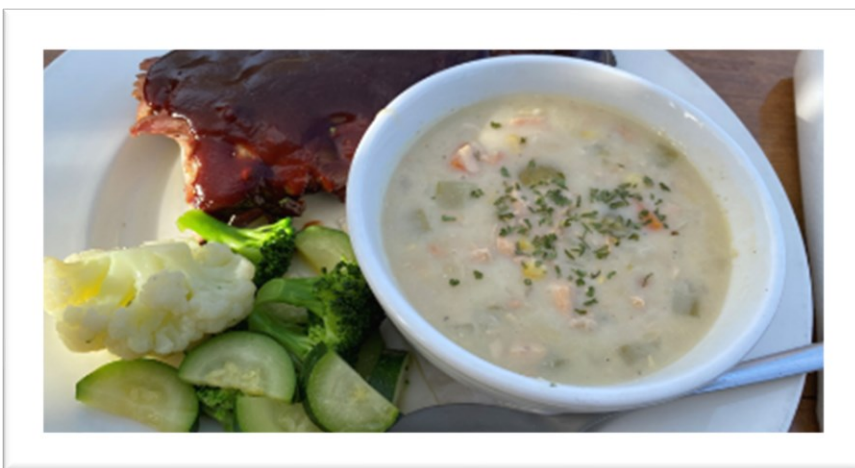
Step 5a: Reclaim awareness

Start using Kemptville on all marketing materials and any online presence so that potential tourists will find you more quickly and repeat customers will recall your experiences with less confusion. Take steps to formally request signage on provincial highways, such as the 416, or simple arrows at intersections such as the one in Beckett’s Landing. Website URLs can easily be purchased and redirected. Brochures and signage can be redesigned.

Step 5b: Get creative

Use Kemptville in a variety of contexts to promote what North Grenville has to offer. ‘Kemptville Flavours’ or ‘Savour Kemptville’ will reinforce local food and culinary experiences. ‘Kayak Kemptville’ or ‘Cycle Kemptville’ can highlight outdoor experiences. Edgier ideas such as ‘Kemptville Dead’ could highlight history and heritage, cemetery tours, and haunt events while riffing on awareness of the popular music fest. ‘Kemptville Lit’ might promote a winter light festival along the Kemptville Creek, with lanterns, floating displays, fireworks, food vendors, public skating, and ice sculptures.

Figure 15: Savour Kemptville, South Branch Bistro





Action 6:

Actively partner with tourism neighbours and friends for added value

Rationale: ‘Do what you do best, and partner for the rest’ is a philosophy promoted by South Eastern Ontario, North Grenville’s Regional Tourism Organization. Despite a realisation that the Municipality needs to drive its tourism destiny, collaboration with groups outside North Grenville’s borders is essential to maximise results. Tourists do not acknowledge municipal or county boundaries, so North Grenville’s tourism neighbours should be viewed as partners, not competitors. Working together builds a positive environment to share ideas, burdens, solutions, and success.

What can happen now: Numerous tourism-friendly organisations have mandates to assist, including provincial and federal government departments, Community Futures offices, and chambers of commerce. Partner agencies are more than willing to facilitate collaboration in support of tourism.

- Step 6a: Help and be helped

Figure 16: Intersection at Beckett’s Landing – no arrow pointing to Kemptville





Step 6a: Help and be helped

- Continue to utilise regional supports from the United Counties of Leeds and Grenville and the South Eastern Ontario RTO to add incremental value to local supports offered to the tourism industry.
 - Examples: Potential funding, partnerships on special projects, joint marketing, workshops, conferences, and networking opportunities.
- Continue to network and build rapport among other neighbours and tourism-friendly partners, offering moral support or other encouragement to peer communities throughout the United Counties and the RTO.
 - Examples: Provide reciprocal directional signage for neighbouring communities (see Figure 16). Offer display space to neighbouring communities such as Merrickville at the International Plowing Match, set up reciprocal links on websites with Kingston, cross-promote local food experiences on social media with Prince Edward County.
- Strike up conversations and explore opportunities with communities, potential partners, and possible sponsors you have never reached out to before. Think outside the North Grenville box. With the assistance of a new Tourism Advisory Committee and tourism operators across the Municipality, brainstorm about other potential alliances and prospects.
- Examples:
 - Existing tourism operators in North Grenville likely have relationships with boating associations, garden clubs, educational institutions, and sports groups.
 - Leverage Rideau Woodland Ramble's connections in their world – what would their customers also like to do while visiting the area?
 - Rideau River Provincial Park (Figure 17) is not technically in North Grenville, but it is an important driver of visitors to the area. When Bon Echo and Sandbanks are at capacity, how can more campers get redirected to Rideau River?

Figure 17: Rideau River Provincial Park





Critical Path

STEP	ACTION	2021	2022	2023	2024	2025
Collaborate to build strong, reliable, unique tourism draws						
1	Shape and support the tourism industry					
1a	Aggressively pursue tourism product development					
	Approve Tourism Strategy and associated budget	•				
	Hire a Tourism Development Coordinator	•	•	•	•	•
	Engagement of tourism business owners	•	•	•	•	•
	Business visits, networking sessions, workshops	•	•	•	•	•
	Develop stories and profiles	•	•	•	•	•
	Photos, videos, stories on website, social media	•	•	•	•	•
	Familiarization tours for businesses, leaders	•	•	•	•	•
	Gather ideas, nurture partnerships	•	•	•	•	•
	Hire summer staff	•	•	•	•	•
1b	Implement leading-edge incentives					
	Activate best-in-class public-realm projects		•	•	•	•
	Install public wi-fi		•	•	•	•
	Community Improvement Plan incentives		•	•	•	•
Leverage existing assets as backdrops for high-yield, high-value experiences for tourists and locals						
2	Fast-track development of tourism experiences on Kemptville Campus					
2a	Experience Kemptville					
	Establish a Tourism Advisory Committee	•	•	•	•	•
	Develop bookable experiences		•	•	•	•
	Explore one-of-a-kind learning trip ideas			•	•	•
2b	Savour Kemptville					
	Expand food experiences at Kemptville Campus		•	•	•	•
	Develop year-round food trail itineraries			•	•	•
	Leverage maple syrup production facility			•	•	•
2c	Camp Kemptville					
	Convert residence to tourist accommodation		•	•	•	•
	Install cabins, glamping, campsites on Campus			•	•	•
2d	Kemptville Events					
	More outdoor concerts on Campus			•	•	•
	Connect larger events to downtown festivals				•	•



STEP	ACTION	2021	2022	2023	2024	2025
3	Expand development of monetised outdoor experiences					
3a	Inspire outfitters and guides	•	•	•	•	•
	Establish guided experiences year-round		•	•	•	•
	Focus on high-yield experiences		•	•	•	•
3b	Celebrate the water					
	Decorate waterways with lighting, plants, art		•	•	•	•
	Organise festivals along Kemptville Creek			•	•	•
	Plan Rideau Canal Bicentennial Party				•	•
3c	Expand self-drive houseboat operations					
	Work with Le Boat to expand its operations	•	•	•	•	•
	Connect with businesses, maximize spinoff		•	•	•	•
	Collaborate with destinations along Rideau			•	•	•
Brand the destination as current, innovative, curious, generous, and family-oriented						
4	Be the place that owns ‘fit,’ ‘sweet,’ and ‘lit’					
4a	Understand target customers, fulfil desires	•	•	•	•	•
	Cater to younger affluent demographic	•	•	•	•	•
	Challenge businesses for new experiences		•	•	•	•
	Concentrate on youth with money, time, respect	•	•	•	•	•
	Use marketing channels, engage visitors regularly	•	•	•	•	•
4b	Experiment, innovate and differentiate					
	Stay unique, step ahead of same-old-same-old		•	•	•	•
5	Brand the tourism destination as Kemptville					
5a	Reclaim awareness	•	•	•	•	•
	Use Kemptville on all tourism marketing	•	•	•	•	•
	Request Kemptville signage on highways	•	•			
	Add website URLs and social media brands	•	•	•	•	•
5b	Get creative					
	Use Kemptville for more experience branding		•	•	•	•
	Develop edgy ideas aimed at young demographic		•	•	•	•
6	Actively partner with tourism neighbours and friends for added value					
6a	Help and be helped					
	Use regional supports to add incremental value	•	•	•	•	•
	Network and build rapport among partners	•	•	•	•	•
	Explore outside the North Grenville box			•	•	•



Scope of Tourism Services

A detailed tourism asset analysis, including site visits to the area by the consulting team, revealed North Grenville's robust inventory of environmental, historical, and cultural assets. By leveraging the attractive attributes of existing tourism products alongside developing and emerging experiences, North Grenville can maximise the economic spinoffs of expanding revenue yields for tourism businesses, nurturing regional spread across the entire Municipality, and broadening seasonality beyond summertime.

The Municipality of North Grenville currently operates as a municipal tourism department embedded with economic development services, a common practice in rural Ontario. Given the nature of the tourism sector in North Grenville and the existence of large DMOs nearby, such as Ottawa Tourism and the regional tourism organisation, it is not recommended that North Grenville move aggressively into national or international tourism marketing. However, product development and destination development are, instead, critical goals for North Grenville. Product and destination development have a critical impact on attracting new residents, building pride in the community, and growing the prosperity of small businesses and, therefore, economic growth and new jobs generally.

Budgetary / resource implications

Within the current budget, the Municipality of North Grenville cannot expand its tourism program. To move forward, the Municipality will need to hire a tourism development coordinator and provide a modest budget for expenses. If the Municipality chooses not to expand tourism services, it will continue to require skilled staff to manage the challenges and opportunities presented by businesses and visitors. An estimated total net levy budget for tourism should be \$200,000 annually (see Figure 18).

Figure 18: Proposed Tourism Budget for North Grenville

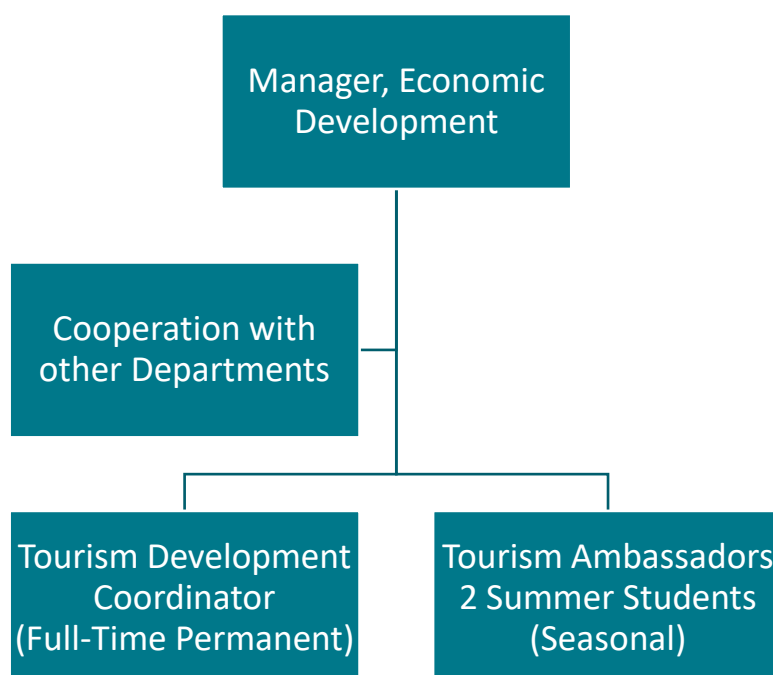
Proposed Annual Tourism Budget	Annual Expense
Salary & Benefits (Tourism Development Coordinator and summer staff)	\$75,000
Marketing, Advertising & Promotions (digital & print)	\$60,000
Product Development (photo/video, web development, fam tours)	\$25,000
Meetings, Workshops, Materials & Supplies	\$25,000
Association Memberships, Conferences, Prof. Dev., & Other	\$15,000
TOTAL	\$200,000



Staffing structure

A full-time permanent Tourism Development Coordinator with skill sets in economic development, business support, and marketing would be the best fit for North Grenville. The employee will play a key role in galvanising support from the tourism sector, collaborating with other departments (Parks and Recreation, in particular), and assisting with the evolution of Kemptville Campus into a world-class, state-of-the-art tourism destination. The Tourism Development Coordinator should report to the manager of the Economic Development Department (see Figure 19).

Figure 19: Tourism Staffing Structure



Most of the Tourism Development Coordinator's time and effort should be focused on product development and destination development. This work will be supported with additional spending on working with businesses to improve their customer service, build their online presence, develop itineraries, shape story ideas and messages, explore solutions to challenges, and increasing the capacity of entrepreneurs and community leaders to respond to tourism opportunities. Product development also includes meetings, workshops, conferences, membership fees, and other costs of collaboration. These costs of around \$65,000 could include:

- Ongoing development of photography and video libraries
- Developing stories and profiles of businesses, events, people, North Grenville products and experiences
- Website upgrades and development, integrating stories and images/videos regularly
- Familiarisation tours for business owners, customer service staff, community leaders, champions, and ambassadors, including study tours of other communities to learn from



- Regular meetings and networking sessions with businesses, learning workshops to spur improvements in business practices and partnerships
- Participation in conferences and associations related to tourism, including Ontario Tourism Summit, EDCO, regional symposia, RTO initiatives, United Counties initiatives, as well as professional development

The Municipality should also employ two summer students at the college/university level to support various activities during the high season. Activities for summer staff may include greeting tourists and answering questions in high-traffic locations and at large events, assisting with social media engagement, updating website content, and other support.

Marketing and promotional activity

A budget of \$60,000 for marketing, advertising, and promotions is the minimum needed to make any sort of tangible impact on desired target markets. Expenditures should be assigned to tactics that are consumed by target audiences outside of North Grenville and not on local media campaigns. Examples of possible campaigns include:

- Hosting qualified social media influencers, writers, and bloggers (cost of overnight stays and meals)
- Regular production of short videos for social media posts
- Facebook and Instagram advertising in cities within a 90-minute drive of Kemptville
- Google search advertising to optimise search engine results
- Ongoing engagement with tourists and influencers via social media and other channels
- Postcard mailings to targeted personas within neighbourhoods of Ottawa and Kingston
- Brochures distributed through CTM in communities across Eastern Ontario
- Visitor Guide / Map of North Grenville distributed to target geographic areas outside North Grenville
- Joint marketing campaigns with the United Counties and RTO

Revenue generation

It is recommended that a pay-to-play revenue-generating program be established to offset the cost of marketing tactics over and above the base promotional plan. Known in some communities as a “partner program,” revenue would flow from the tourism industry as part of an annual participation fee and/or a project fee. An annual fee of \$250 (plus HST) per business would help offset the printing costs for an annual visitor guide. The challenge always will be to minimise the cost of collecting the revenue, as some businesses need to be prompted repeatedly to pay bills. A tourism development coordinator should not be responsible for accounts collection. Similarly, if a Municipal Accommodation Tax (MAT) is envisioned for North Grenville, the cost of collection must be reckoned into the business case.

Monitoring outcomes

It is recommended that a Tourism Advisory Committee of Council be established, made up of five to seven tourism operators with direct involvement in serving visitors, to monitor and report on outcomes related to the Tourism Strategy. The committee would meet quarterly at most, providing constructive



feedback to staff on product development initiatives and marketing. The committee would also provide feedback on policies, for example, on municipal processes such as street closures for festivals, criteria for CIP incentives, definitions of uses in the Zoning By-Law, etc. A summary report to Council on tourism development activities and outcomes would be an expected annual deliverable.

Target markets

The following demographic personas are target markets for Kemptville, sourced from Environics Analytics Prizm database:

Younger, single urban renters

The “Latte Life” persona is one of the youngest affluent consumer segments, fresh out of university, with an average household income of \$91,000. They live primarily in Ottawa’s Golden Triangle and Centretown neighbourhoods, Montreal’s Ville-Marie section, and near Skeleton Park in Kingston. They enjoy nightlife, music festivals, and going to the gym. They balance alcohol and cannabis consumption with healthy foods, especially organic produce. The typical household consists of young singles or couples aged between 25 and 44. They drink craft beer, used mobile wallets, frequent Starbucks, and drive compact premium vehicles.

Younger and middle-aged upscale city dwellers

The “Downtown Verve” persona is a mix of younger and middle-aged singles and childless couples, with an average household income of \$170,000 in mainly white-collar jobs. Some rent apartments and others own their places. They live in the Westboro and Little Italy neighbourhoods of Ottawa and Montreal’s neighbourhoods between Côte-des-Neiges and Montreal West. They enjoy small bars and restaurants and maintain a healthy lifestyle, eating organic food, and taking fitness classes. They drink craft beer, drive imported compact SUVs, and donate to environmental groups.

Younger and middle-aged suburban families

The “All-Terrain Families” persona is a mobile group with high rates for fishing, camping, and playing team sports. Most of the heads of the household are under 45 years old, and their kids are younger than 15. With average household incomes of \$135,000, the adults earn upper-middle incomes and own their homes. They live in the suburbs around Ottawa, Kingston, and Pembroke. All-Terrain families enjoy power boating, are physically active, but also bank and game online.

Public Facility Requirements

There are a variety of public facilities within North Grenville that may be used for tourism purposes. Most uses should centre around a tourism experience, especially any tour or activity that can be monetised by private-sector partners.

Visitor services

In past decades, municipalities would support bricks-and-mortar tourist information centres, complete with parking, staff, washrooms, and brochure racks. With the arrival of the internet and websites in the 1990s, the use of tourist information centres has declined dramatically. Today, most municipalities use



existing customer service locations to help tourists. The location should not be combined with regulatory or administrative functions, such that a tourist would be lined up behind a disgruntled contractor looking for a building permit or a senior paying their taxes. Kemptville's library is a modern structure that is very welcoming, has established traffic and operating hours, and has staff and protocols in place to assist people. A tourist brochure rack is already located in the lobby. If the Municipality chooses to establish services to assist tourists, it would be best housed in the library.

Event venues

The Municipality has many assets that could be utilised as backdrops and venues for tourism experiences, tours, special events, and festivals. These assets include but are not limited to municipal forests, parks, trails, roads, bridges, and buildings.

Municipal Accommodation Tax

The Province of Ontario enables municipalities to levy a 4% MAT on tourists staying overnight. If the Municipality chooses to implement the MAT, revenues can be collected from hotels, inns, motels, bed and breakfast establishments, short-term rentals, and potentially boat slips and campsites.

Positive attributes to implementing a MAT include increased revenues for funding tourism marketing and development.

Negative attributes include the cost to administer collection and reporting of the tax, resistance from accommodators, and the legislated requirement to provide at least half the revenue to an arms-length tourism authority, requiring one to be established if no agency can deliver the service.

If North Grenville's existing commercial tourism accommodators are supportive of the MAT, and a satisfactory financial flow-through mechanism can be developed to address provincial requirements, then the implementation of a MAT is recommended sooner rather than later.

However, given that the discussion and administrative setup of a MAT could deflate the enthusiasm that exists in North Grenville's tourism industry currently, it is recommended that the municipality postpone the collection of a MAT until there is general agreement among lower-tier municipalities within the United Counties and South Eastern Ontario region to implement such a tax.



HOURS
MON 12:00 - 9:00
TUE 12:00 - 8:00
WED 12:00 - 9:00
THU 12:00 - 8:00
FRI 12:00 - 8:00
SAT 12:00 - 9:00
SUN 12:00 - 7:00
www.southbranchbistro.com





2

STRATEGY BACKGROUND

PURVIS HALL

Prepared By:
MDB Insight



Strategy Background

In June 2020, the Municipality of North Grenville released a Request for Proposal for the provision of a consultancy firm to create a Tourism Strategy. The Municipality received matched funding from Regional Tourism Organization 9 (RTO 9) to complete the strategy. As the first tourism strategy for the Municipality, the purpose of this project was to highlight the economic potential of the sector and provide a clear set of recommendations on how to create a thriving and sustainable tourism industry moving forward.

Detailed methodology

MDB Insight utilised a four-stage process to develop the strategy, as outlined below:

Figure 20: Project Methodology



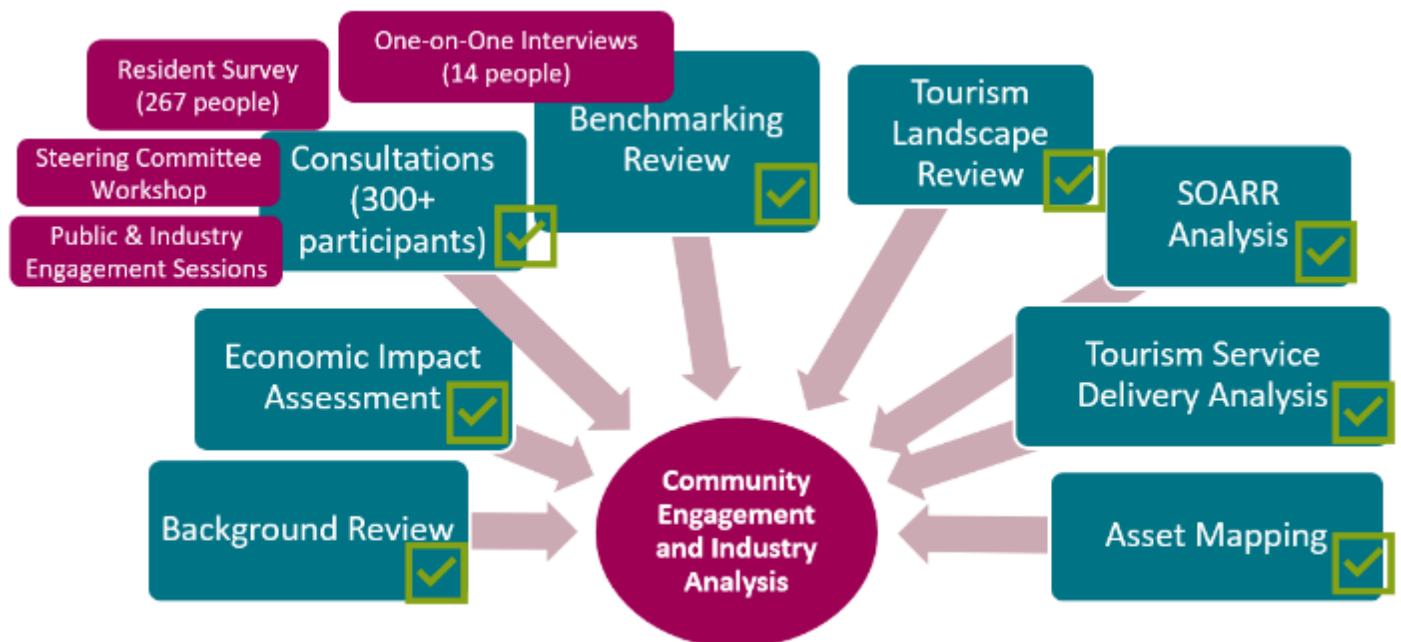
- **Phase 1 – Project Initiation:** This phase included initial start-up items and meetings with the Municipality of North Grenville, including the creation of a Project Charter.
- **Phase 2 – Community Engagement and Industry Analysis:** This phase involved community engagement on a variety of levels (e.g., Industry, Residents, Steering Committee) via both workshops and an online survey, the collection and analysis of data, and a situation assessment prepared based on these lines of evidence.
- **Phase 3 – Tourism Strategy Development:** This phase of the work involved the creation of the Tourism Strategy based on industry analysis and stakeholder observations. A draft version of this strategy was presented to the tourism steering committee in PowerPoint form before the final document was created.
- **Phase 4 – Report and Implementation:** During the final phase, all feedback from the client was incorporated into the Tourism Strategy, and the final document was completed, with an implementation plan developed.



Community Engagement and Industry Analysis

Stakeholder consultation formed an integral part of the development of this strategy. Significant opportunity for input from the Municipal Council, industry, and public input from community groups and residents was provided to ensure that the final strategy recommendations were realistic, implementable, and resonated with residents and municipal staff. Over 300 people were consulted during this process, along with in-depth background review and analysis (see Figure 21).

Figure 21: Consultation Overview





The following section details the key findings from all consultation efforts. The key themes have been summarised in Figure 22 below, with a more detailed analysis provided afterward.

Figure 22: Consultation Key Themes







Untapped potential

Leveraging geographic location

A common theme that emerged from stakeholder consultation efforts and the background review was the untapped potential of North Grenville as a tourism destination. Situated between several major urban hubs (e.g., Ottawa, Kingston, and Montreal), North Grenville has somehow been missed on most tourist maps. As a bedroom community of the Nation's Capital with a rapidly growing population base, North Grenville stakeholders felt there is strong potential to develop tourism assets, gain consensus on a path forward, and make tourism a priority.

Capitalising on underutilised assets

Improving park and trail facilities

One of the most consistent messages from stakeholders was the untapped potential of North Grenville's natural assets. According to the 2020 Parks, Recreation & Culture Master Plan, the Municipality has approximately 45 hectares (111 acres) of municipally owned and managed active parkland and 1,251+ hectares (3,000+ acres) of open space. There are also approximately 41 kilometres (25 miles) of off-road recreational trails, including trail systems in Ferguson Forest Centre and Kemptville Campus.

The Ferguson Forest trail network and Limerick Forest have strong tourism development potential but require collaboration with third-party entities who manage these sites. This includes winter-based trail development (e.g., cross country skiing), improved signage, and increased trail connectivity with existing regional networks. As part of a survey during the development of the tourism strategy, 64% of residents agreed with more tourist activity in municipal parks, and 59% agreed with more tourist activity on trails.

Waterfront Development

The waterfronts of the Rideau Canal and Kemptville Creek also have strong tourism potential but are currently underutilised. A survey conducted for the North Grenville Parks, Recreation & Culture Master Plan found that 42% of respondents feel the waterfront does not meet expectations currently. As part of the tourism strategy survey, 64% of residents agreed with more tourist activity along the waterfront. Increasing access to the water for both boats and kayaks, lengthening the waterfront trail network, and increasing recreational amenities within community parks (e.g., benches, BBQs, etc.) are among some potential action areas.

Capitalise on Kemptville Campus

The most exciting opportunity stakeholders discussed was the development of Kemptville Campus. The new master plan that is in the final stages of development offers an exciting vision of a hub for residential and visitor arts, entertainment, and tourism activities. Opportunities include investigating the potential to start a hotel in a former residence, leveraging the maple bush trees, building out experiential tourism experiences, promoting trails, and using the space as an event and meeting place are all exciting propositions that could cement North Grenville's place on the tourism map within Eastern Ontario. 72% of residents agree there should be more tourist activity at Kemptville Campus.



COMMUNITY HALL

WORTHINGTON
TOWNSHIP



Tourism product development

Lack of Critical Supply

One of the key areas North Grenville is lacking is a critical supply of core tourism attractions that bring in a steady supply of visitors year-round. As the tourism asset analysis shows (see Technical Report and Tourism Asset Analysis section below), the Municipality currently only has four major attractions¹ and 41 emerging assets. Therefore, increased focused and resource allocation on developing those emerging assets, or attracting new tourism operators, will go a long way towards creating a sustainable tourism sector.

Attracting Le Boat

A substantial tourism product opportunity is attracting Le Boat to the community as part of a waterways revitalisation strategy. The company is a major tour operator running on the Rideau Canal and has expressed a desire with municipal staff that it is interested in expanding its operations in the North Grenville area. A joint funding application could fund a new mooring location to facilitate this expansion.

Financial incentives and taxes

Stakeholders were also asked to discuss potential financial incentives and taxes that could be implemented to fund tourism incentives. Several were discussed, including:

- *Municipal Accommodation Tax (MAT)* – There was agreement this initiative has potential as it taxes visitors and not locals. About half of the residents agreed with establishing a MAT. Further, neighbouring municipalities already use such a system. However, a drawback was the lack of accommodation within the Municipality, meaning in the short term, it may generate limited revenues.
- *Municipal Dollars and Investment* – Stakeholders felt that using municipal funds would be one of the easiest ways to start development. Over 53% of residents agreed with creating a dedicated tourism budget, 31% said ‘maybe,’ and 9% disagreed (5% don’t know / not sure). However, there might be resident resistance if there was a tax increase attributable to tourism. Municipal staff indicated that roughly only \$10,000 had been allocated to tourism over the past two years by the Municipality, which is not enough to fund a reasonable effort.
- *Upper levels of government* – The United Counties may be able to assist with financial matters, as with the provincial and federal government and tourism organisations. For example, the Regional Tourism Organization (RTO) 9 has funding for events under experiential tourism products and already assisted North Grenville by providing matching funding for the development of this strategy.
- *Community Improvement Plan for tourism* – The CIP is currently being reviewed, and it was advised that more tailored tourism incentives should be incorporated into the new plan.
- *Cooperative marketing fund* – Local tourism businesses could pay a fixed fee to receive marketing or be part of a local tourism partnership group.

¹ Major Attractions include: The Rideau River National Park, Kemptville Live Music Festival, Rideau Woodland Ramble and Saunders Country Critters Zoo Sanctuary & Garden Centre





Tourism product development, then promotion

As previously highlighted, more comprehensive marketing and promotion activities are needed to help drive new visitors into North Grenville. Current advertising efforts are focused on the municipal website or social media platforms, which have limited consumer reach. Investigation of other pull marketing tactics (e.g., engaging bloggers) are important actions. However, stakeholders expressed the need to be cautious with marketing spending, as it can quickly become an expensive activity with limited Return on Investment (ROI). Instead, product development – to ensure tourism businesses are ready and positioned for opportunities – should be the first investment priority.

Formalising tourism as a priority area

Clear direction forward

Stakeholders were excited that tourism was being considered a priority, as evidenced by the creation of this tourism strategy. They felt that the current Mayor and Council were largely pro-tourism and that this strategy should capitalise upon this optimistic sentiment and make substantial progress quickly so that tourism continues to be prioritised by future municipal leaders. Stakeholders were also clear this strategy must be action-oriented, implementable, and realistic in terms of the goals that are set.

Embracing Collaboration

To be successful, North Grenville must empower key local, regional, and provincial partners to collaborate on product development, marketing, and training initiatives. Local partners such as the Business Improvement Area (BIA) expressed strong support in facilitating tourism development, such as acting as an advisory committee or alternative tourism body. However, the feedback was clear that the Municipality needs to be the one driving progress on these partnerships. Positive steps have already been taken, such as the joint funding of this strategy with the Regional Tourism Agency 9 (RTO 9) – an important player in Eastern Ontario tourism initiatives – but more partnerships need to be quickly established.

Celebrating wins

Municipal staff also felt it was important to celebrate small wins along the way. For example, the redevelopment of the Municipality's website under the domain name *Explore North Grenville* looks fantastic, with several useful tourism resources including a visitor guide (both an online and print edition), day trip ideas, photos of tourism assets, and more. Similarly, content on Facebook and Instagram is of high quality, and there are consistent uploads. While significant work still needs to be done to build a vibrant tourism sector, it is essential to reflect on all the positive work that has already occurred to be better prepared for the task ahead.



Brand identity

North Grenville vs. Kemptville

One important issue raised during consultation efforts was the confusion surrounding North Grenville's brand. Many stakeholders felt that North Grenville had little to no brand recognition for people outside of the Municipality, with Kemptville being the recognisable brand name. Stakeholders expressed a desire for the tourism strategy to provide branding direction moving forward.

Greater Ottawa Correctional Complex

Another challenge facing residents comes in response to the Province's announcement that a new correctional facility will be built on government-owned land just outside Kemptville. Many workshop participants felt this would harm the North Grenville brand image, and its location next to Kemptville Campus would reduce potential tourism traffic. Conversely, some participants felt the facility would strengthen the business case to establish a new hotel in the region, along with providing other economic benefits (e.g., new jobs, visitors, etc.).

Strong leadership

Capitalising on momentum

Community stakeholders were clear that to create a sustainable industry requires strong leadership from the top. Stakeholders stressed the need for the tourism strategy to deliver some quick wins during the remainder of the current Council's term to validate the sector as being viable.

Advocating from the top

Part of the role the Municipality must play is being an effective advocate for developing North Grenville's tourism sector. This means using connections, public and media relations, and allocating funds to ensure that, regionally, stakeholders are aware that North Grenville is serious about developing tourism, and they should support development opportunities. Without this consistent message from senior leadership positions, the industry will be slow to develop.

Overcoming Covid-19

2020 has been an incredible year of hardship for tourism operators around the world. Forced closures of international borders, lockdowns, and a declining economy have resulted in a decline in the tourism sector. With a vaccine in the early stages of distribution at the time of writing this report, it is important to acknowledge the threat that pandemics and other major global events have on the tourism sector. North Grenville should look to capitalise on a shift in consumer preferences to more localised travel options, the buy-local movement, and visitors' increased prioritisation of the outdoors in developing the Municipality. With the right vision, funding, staffing, and resilience, stakeholders believe that the potential of North Grenville as a tourism destination in Eastern Ontario is significant.

NORTH GRENVILLE

Demographics and Labour Force (2016 Census)



Population



16,451

↑ 9.1% from 2011

North Grenville's
population grew faster than
both Ontario and Ottawa.

Labour Market



8,585 jobs

in North Grenville

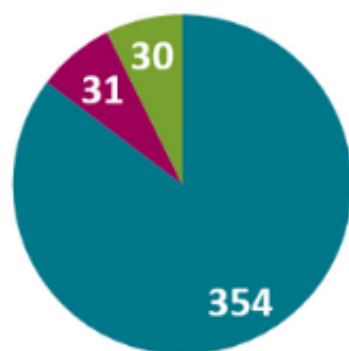
In 2016 a total of 8,585 (52.1%) North Grenville residents had jobs. Of that total 785 worked at home and 1,280 held jobs with no fixed workplace address (sales, service, construction workers).

53.9%

of jobs are employed locally

Employers provided 4,635 jobs (53.9%) in North Grenville (including the 785 residents working at home). Overall the most important source of the economic well-being of its residents stems from its base of commuting workers generating 3,950 jobs.

Economic Base: Jobs in the North Grenville Tourism Sector



- Retail trade
- Arts, entertainment, recreation
- Accommodation, food



415 jobs

Of the 836 Economic Base jobs
in North Grenville are
accounted for by tourism
activities.

NORTH GRENVILLE

The Tourism Economy Locally



Tourism Impact

4.5%

of North Grenville's
GDP (directly)



9.1%

of all jobs (415) in the
municipality are within
the tourism sector.



However, North
Grenville's residents depend
far more on jobs located in
Ottawa than on jobs located
within North Grenville .

Gross Domestic Product

Metroeconomics estimates that tourism directly accounts for \$19.5 million of North Grenville's total GDP of \$424.1 million, that it indirectly impacts an additional \$4.9 million of GDP, and that it induces a further \$3.5 million of GDP in the local economy.



+\$27.9M

in total GDP impact

The total impact of \$27.9 million suggests North Grenville accounts for a significant share of the \$309 million* of tourism activities coming from the communities directly along the Rideau Corridor.

North Grenville's Tourism Industry Direct Indirect, Induced and Total Economic Impacts

Categories	Direct	Indirect	Induced	Total
Output (\$ Millions)	\$34.6	\$17.5	\$14.3	\$66.4
GDP (\$ Millions)	\$19.5	\$4.9	\$3.5	\$27.9
Labour Income (\$ Millions)	\$15.2	\$2.8	\$1.6	\$19.6
Jobs	415	52	36	503

Taking account of its direct, indirect, and induced impacts the Township's tourism industry generated \$27.9 million of constant 2012 dollars GDP in 2016 and supported a total of 503 jobs.

Data sources:

Statistics Canada Economic Impact Multipliers | *Metroeconomic* 2020 | *BDO report, "Rideau Heritage Route Tourism Association Tourism Economic Impact and Product Feasibility Study, 2017"

NORTH GRENVILLE

Tourism Asset Analysis

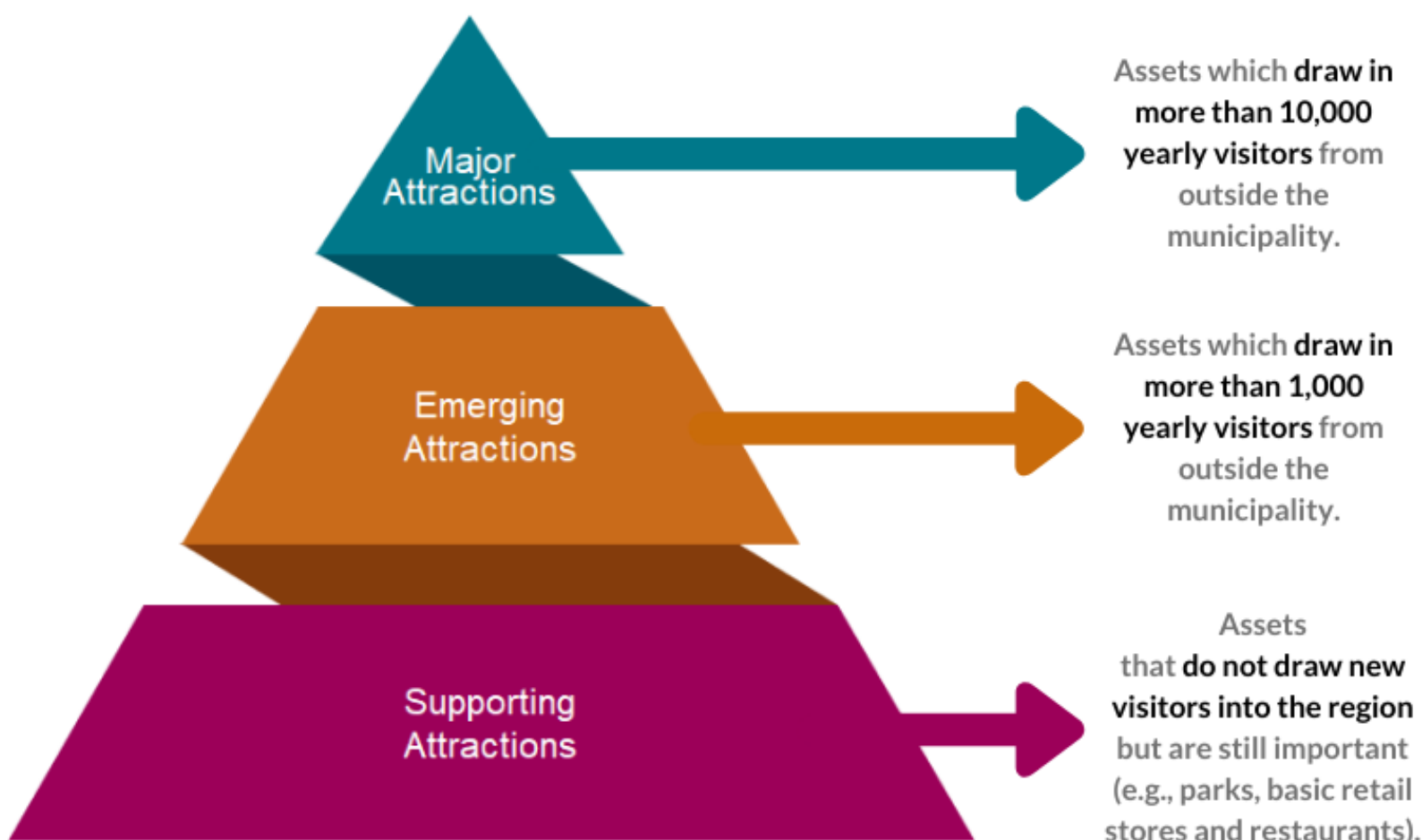


Overview

An asset analysis was also conducted to understand the level of tourism development within the municipality and opportunities for growth. Assets were assessed on:

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

Tourism Asset Analysis Framework



NORTH GRENVILLE

Tourism Asset Analysis



Asset Breakdown

4



major
attractions

Assets include the Rideau River Provincial Park, Kemptville Live Music Festival, Rideau Woodland Ramble, Saunders Country Critters Zoo Sanctuary & Garden Centre.

41

emerging
attractions

Assets include Kemptville Campus, local farms, municipal recreational amenities (e.g., Municipal Centre Rink), important shops and restaurants (e.g., Salamanders, the Dairy Barn), the trail network, beaches, local golf courses, the North Grenville farmers market and other key events.



26

supporting
attractions

Assets include all other parks and recreational spaces, accommodations (e.g., Kemptville Suites), other restaurants and retail outlets (e.g., Grahames Bakery) and river access points.

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

Tourism Development Stage



Developing

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

Data sources:

Internal North Grenville Tourism Asset List | Stakeholder Consultation | MDB Insight

NORTH GRENVILLE

Survey Findings



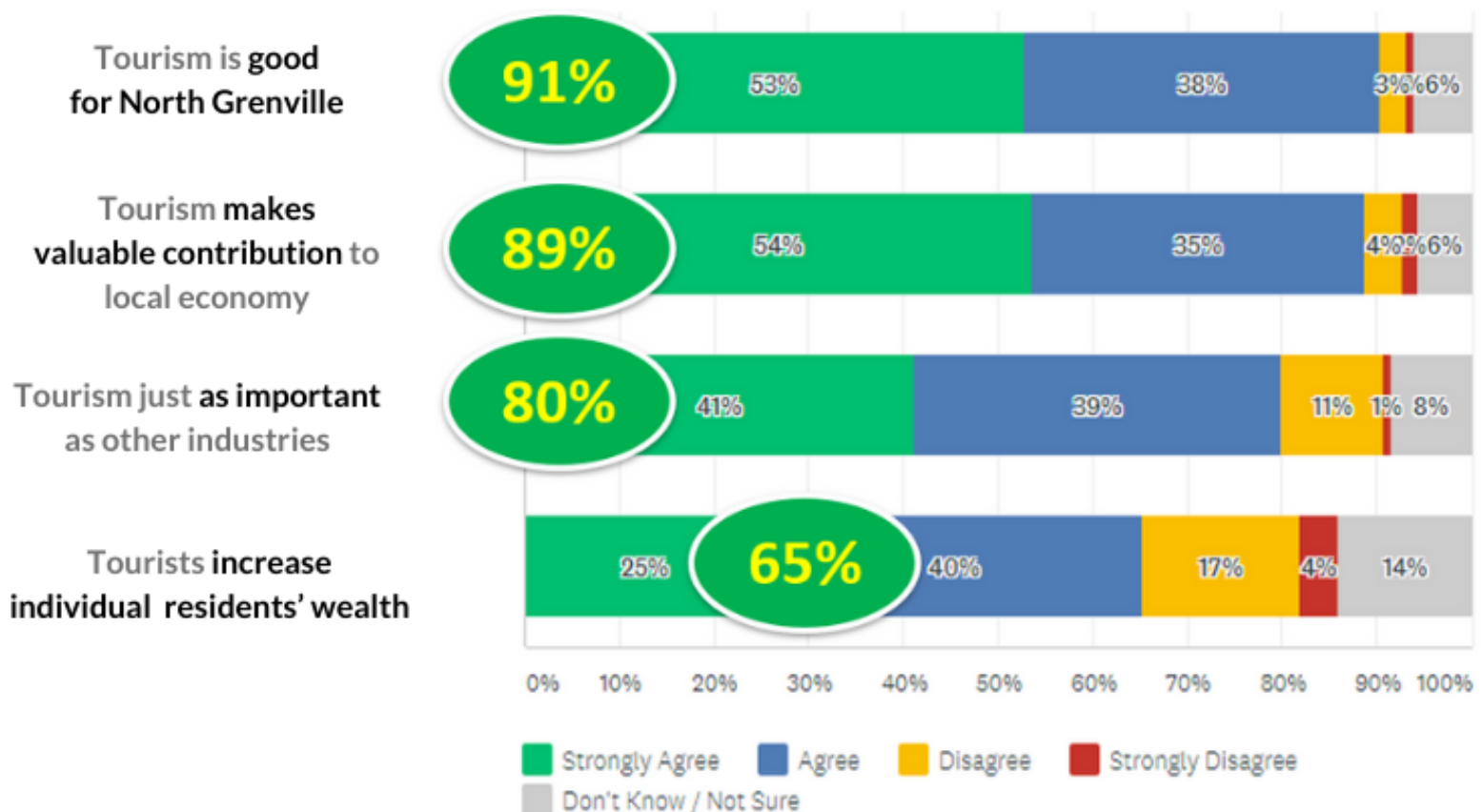
Overview

As part of the consultation efforts, a community survey was completed and a total of 267 people participated.

The survey shows strong resident support for the prioritization of the tourism sector by council, with participants believing tourism is good for North Grenville, helps develop the economy and increases personal wealth.

Note: For a full summary of findings refer to the North Grenville Tourism Strategy Technical Report.

Importance of tourism



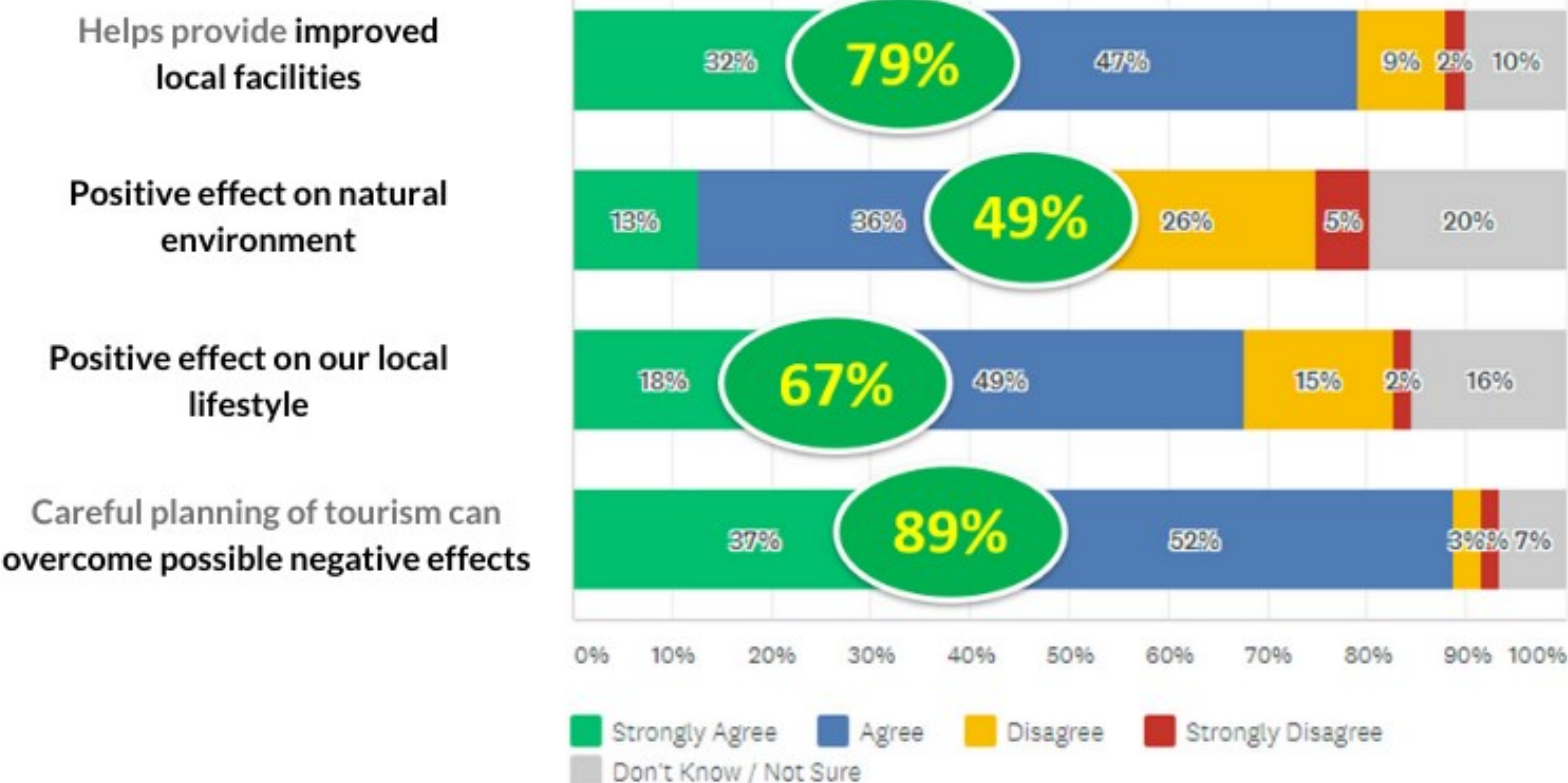
Data sources:
MDB Insight Resident Survey

NORTH GRENVILLE

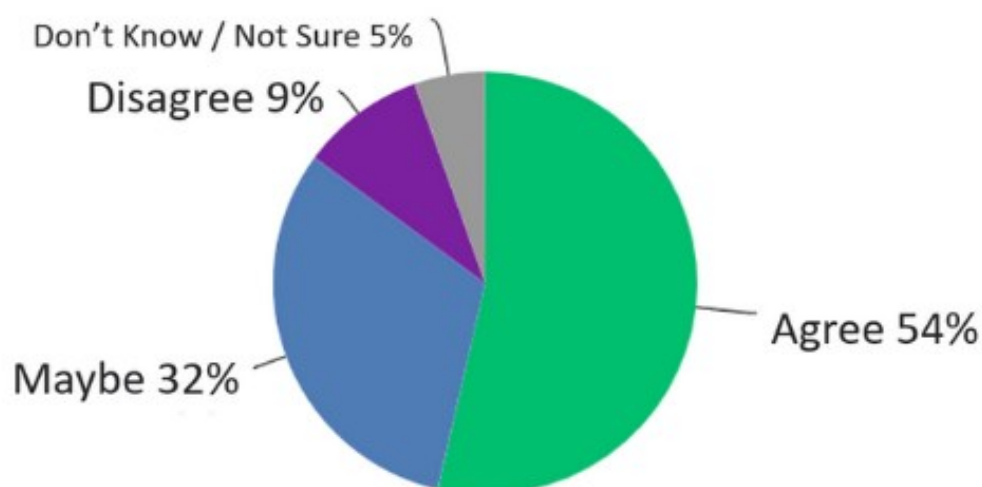
Survey Findings



Benefits of tourism



Support for dedicated municipal tourism budget

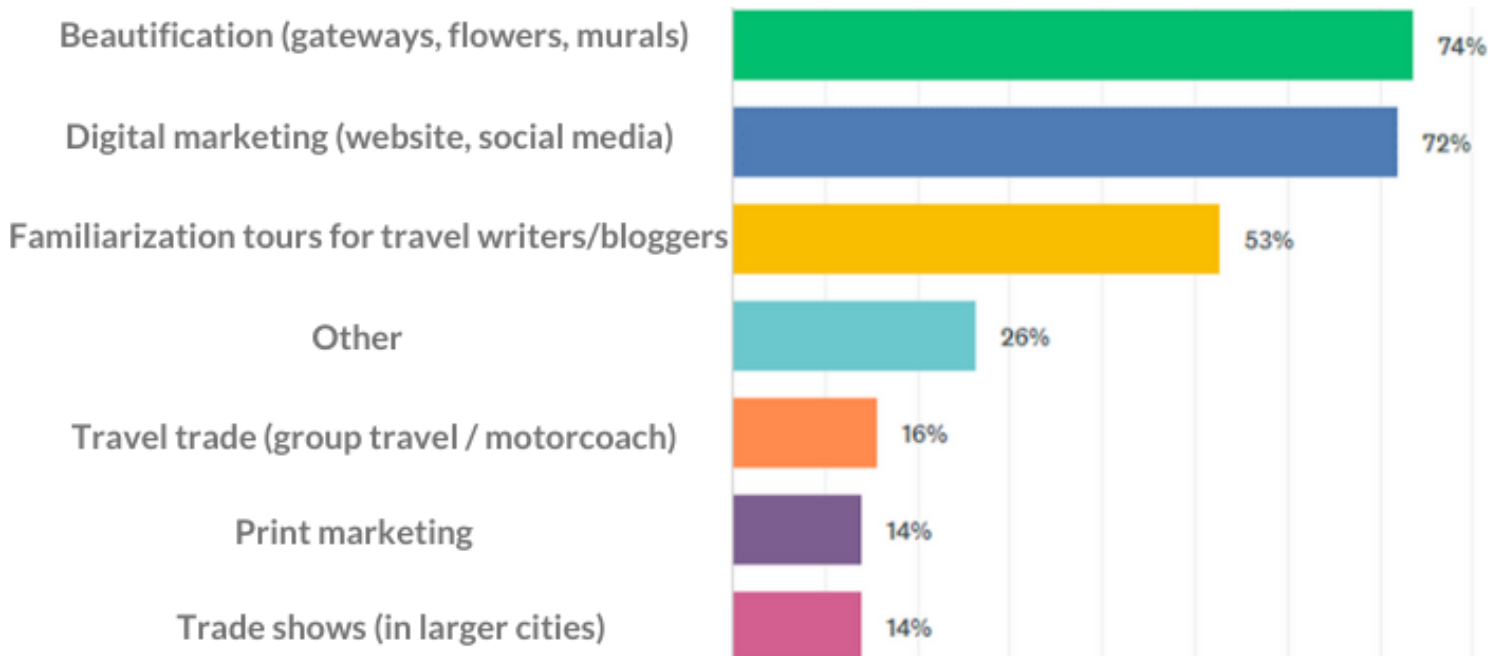


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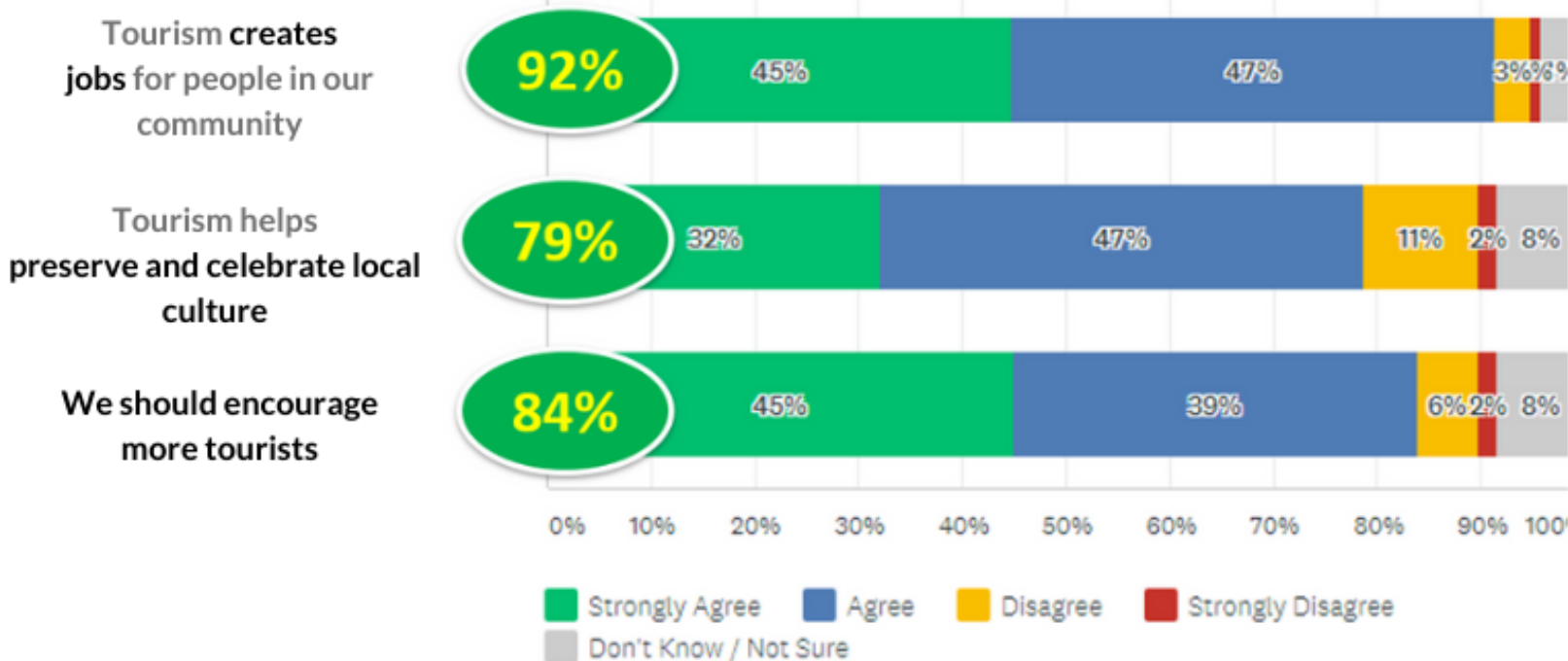
Survey Findings



Municipal focus: Tourism marketing



Benefits of Tourism

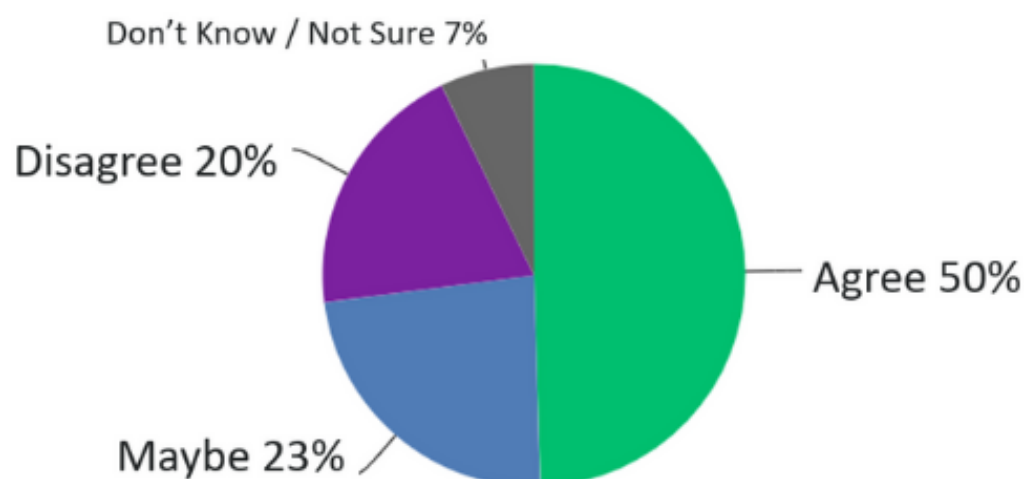


NORTH GRENVILLE

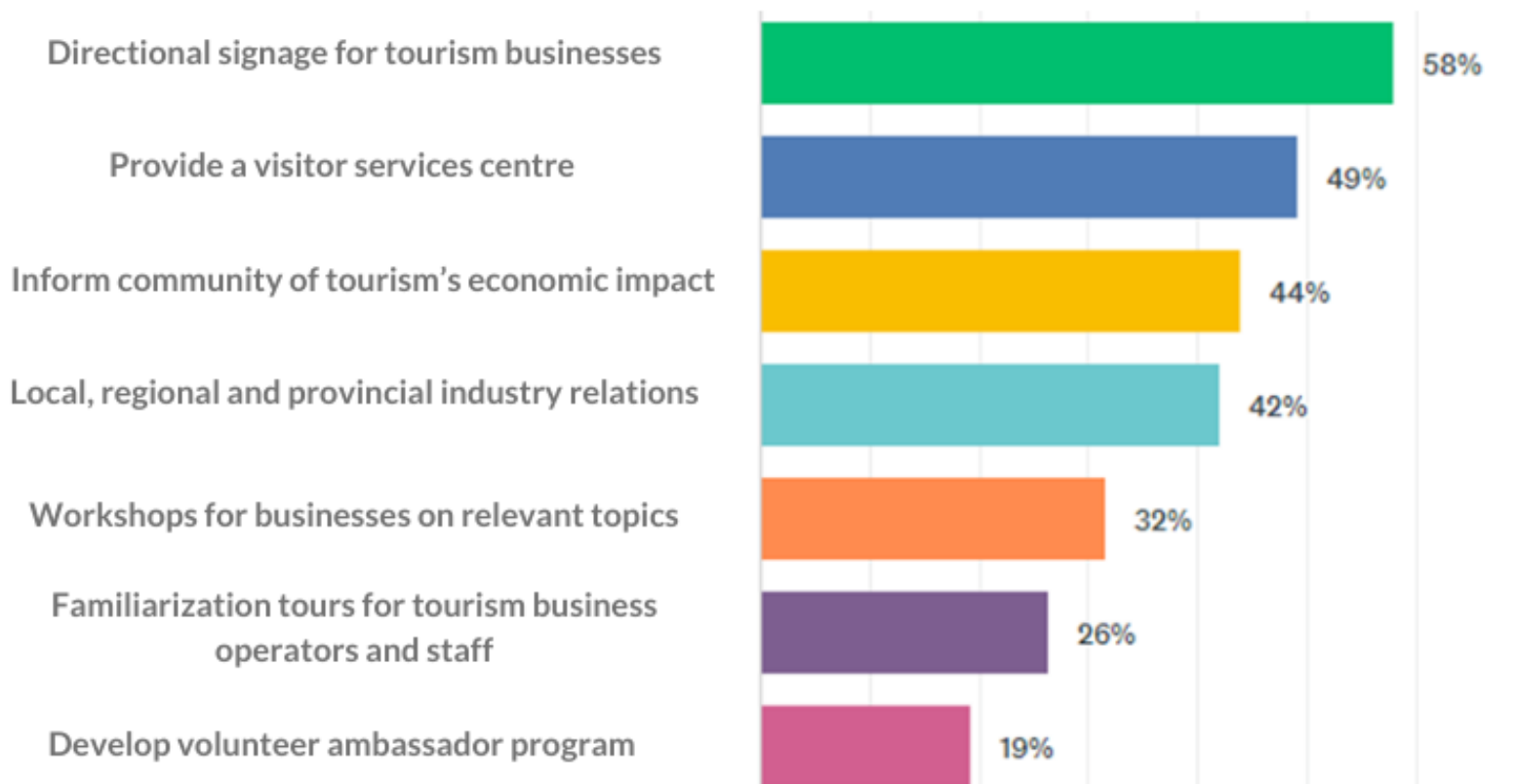
Survey Findings



Support for Municipal Accommodation Tax



Municipal focus: Tourism development



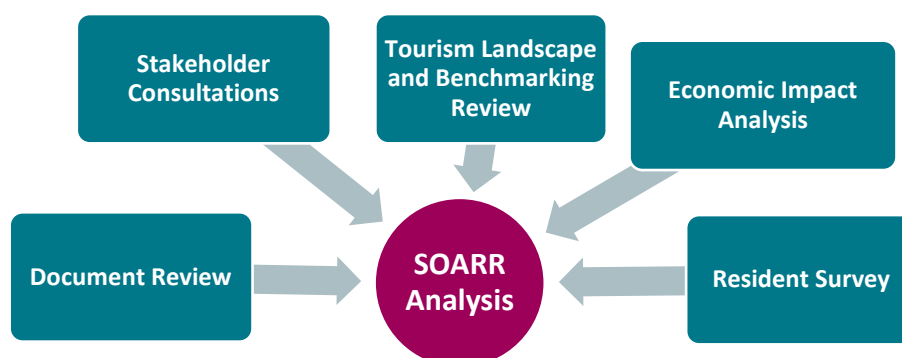
Data sources:
MDB Insight Resident Survey



SOARR Assessment

A SOARR Assessment is a model for reflecting on strategic planning by studying identified Strengths, Opportunities, Aspirations, Risks, and Results (SOARR). It is a forward-looking model, taking elements of what would traditionally be affiliated with an analysis of Strengths, Weaknesses, Opportunities, and Threats (SWOT). It then uses insights gained through stakeholder consultations to inform what is desired for the future and how to know when aspirations have been met (see Figure 23).

Figure 23: Data Points that Influence SOARR Assessment

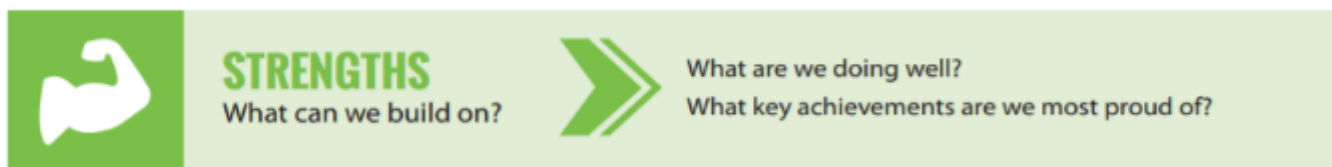


The concepts underpinning the SOARR model are outlined in Figure 24. The SOARR Assessment is developed in conjunction with the other background studies and content located in the Technical Report. In essence, the SOARR represents a summary of important learnings uncovered during the research that went into the strategy.

Figure 24: Key Considerations for a SOARR Analysis







Natural assets

The Municipality has a growing trail network with expansion potential. There is a need for better connectivity between assets (e.g., Ferguson Forest and Limerick Forest). Burritts Rapids Lock, Rideau Woodland Ramble, the Rideau Heritage Route, and the Garden Trail are also important assets.

Kemptville Campus

Formerly operated as part of the University of Guelph, the Municipality recently acquired the property with the eventual goal of creating an educational and multi-purpose community hub. A Kemptville Campus masterplan was recently completed and outlined an exciting vision and action steps for development.

Kemptville Live

Kemptville Live is the premiere live music concert event for the Municipality, drawing in tens of thousands of visitors each summer. Unfortunately, due to Covid-19, the event was cancelled in 2020.

Geographic location

North Grenville is uniquely located near several large urban hubs, including Ottawa, Kingston, and Montreal, along with smaller destinations such as Merrickville and Brockville. North Grenville has seen a 9% spike in population from 2011 to 2016, primarily due to an influx of commuting residents.

Hamlets

In addition to Kemptville, North Grenville is home to several historical hamlets, which are largely unvisited. These secret gems offer the potential for development and inclusion into the overarching tourism product.

Kemptville Creek and Rideau River

The Rideau River and Kemptville Creek are excellent paddling and recreational destinations for tourists. Beginners, leisure paddlers, and families find the creek suited for kayaking or fishing, while the river is ideal for boaters.

Ferguson Forest Dog Park

The Ferguson Forest Dog Park is just minutes from downtown Kemptville and is a drawing card for outside pet owners (e.g., Ottawa).



Kemptville Campus

As highlighted, Kemptville Campus offers numerous tourism opportunities for North Grenville and can act as a hub for tourism activities. Implementing actions from the *Kemptville Campus Master Plan*, in addition to actions recommended in this report, are essential initial steps.

Natural asset development

There is a lot of potential to improve the trail network, dog park, and more, to attract visitors. Increasing trail promotion, building winter-based trail activity (e.g., cross-country skiing), and improving signage are important actions. Furthermore, strengthening trail connectivity within the region is an important step. The *Municipality of North Grenville Parks, Recreation & Culture Master Plan (2020)* offers several detailed suggestions regarding trail and park development.

Leverage water assets

The waterfront could be improved and strengthened, improving boat access, pathway connectivity, tourism operators, and more. Several reports have been published exploring the potential for a water-based pontoon walkway and other development activities, which could be a promising draw for visitors.

Le Boat

Europe's largest self-drive boating company, Le Boat, made Smiths Falls its North American headquarters a few years ago, investing \$16 million in the region over several years. Le Boat's operations on the Rideau Canal will bring many high-income international tourists to the region. This significant investment has also inspired the towns along the Rideau Heritage Route to consider further investments in the canal.

Experiential tourism

There is an opportunity to grow this segment, capitalising on recent tourism trends (e.g., Covid-19 and the travel local movement.) More focus is needed on developing local food, arts and culture, and other event activities.

Agri-tourism

Local agriculture producers could be leveraged to build on-farm experiences and agri-based events. There are a few wineries in the region—more wineries, as well as craft breweries and distilleries, present positive prospects.

Winter-based activities

North Grenville's climate and predictable annual snowfall present opportunities to build out winter events, such as snowmobile trails, cross-country skiing, outdoor skating, snowshoeing, winter camping, winter markets, and more.



Downtown activation

The recent Promenade event demonstrated that the Municipality and BIA should continue with street activation events and focus on attracting more vendors and activities post-Covid. New merchants would be welcome in the downtown core, as it is very service-oriented. There could be more tourist shops.

Festivals and events

Kemptville Live is very successful, and there is an opportunity to expand into other seasons. For example, a regatta on the water, a winter-based skating festival, or more. A maple syrup festival located at Kemptville Campus is another opportunity.

Collaborative marketing

Marketing and linking assets together are significant opportunities. There has been little promotion to date of Kemptville and North Grenville as a destination outside of the Municipality's Facebook or Instagram pages, which are focused mostly on residents. Working with regional partners is an important first step, as is connecting with special-interest bloggers. Current staff outcomes have been excellent in connecting with operators and improving digital web and marketing presences, with positive feedback received from several stakeholders. Options could be explored for tourists to be able to download user-friendly maps that integrate with their smartphones.

Sports tourism

There is an opportunity to leverage the Municipality's recreational facilities and golf courses to build a sports tourism event calendar. The local curling club is popular and might have sports tourism potential.

Increasing accommodations supply

Kemptville Suites, the Clothier Inn Motel, and a few short-term rentals are the only accommodation options available currently. There is lots of room to attract more operators or utilise the residential facility on Kemptville Campus. This was a contentious issue raised by stakeholders.

Wayfinding & signage

Directional signage offers room for improvement. Opportunities to pull in traffic from the 416 are available, as North Grenville and Kemptville are being bypassed currently.

Promote the hamlets

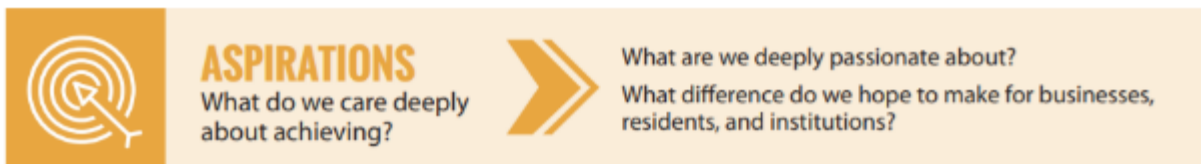
Kemptville has a distinct tourism appeal, but the hamlets are underutilised as possible locations of interest to tourists. Agri-tourism and more businesses like the Brigadoon Restaurant, as well as highlighting the beautiful architecture, offer opportunities.

Rebranding

A core issue is that North Grenville is not an easily recognisable brand. Visitors usually only recognise Kemptville. Therefore, there is an opportunity to explore a branding strategy.

Financial Incentives

Financial incentive programs through the Community Improvement Plan offer opportunities.



Recognisable and robust tourism brand is developed

The brand has been clearly defined, with no confusion between North Grenville and Kemptville.

Sustainable and thriving tourism sector

Growth is sustainable but consistent, and the region leverages local partnerships to their fullest. Traffic is pulled from Hwy 416.

Solid supply of accommodations

Enough hotels have been developed to service all market demographics, but there is not an oversupply of rooms.

Four-season destination

The Municipality has developed consistent visitation year-round that is driven by high-quality events, local products, and a strong marketing and communication strategy.

Kemptville Campus

Kemptville Campus has been developed and is a hub for activity and a centre of tourism efforts for Eastern Ontario, Quebec, and the U.S. It draws in thousands of visitors each year but also helps support the excellent quality of life for residents.

A wonderful place to visit interconnected and high-quality trail network

Weekend visitors are walking the waterfront trails from Ferguson Forest to downtown Kemptville and stopping for lunch, having a coffee, and interacting with locals. The Municipality is a hub for cyclists, young professionals, and young families.

Developed waterfront

Le Boat has been attracted to the region. Daytrip boaters are regularly using Kemptville Creek to access the downtown area for dining and shopping.

Agri-tourism

On-farm experiences and local food is flourishing. There is an established food and drink route through the Municipality. The farmers market is thriving at its new location at Kemptville Campus.


Diversified sector

Each hamlet retains its unique identity and is on the tourism map. Old Kemptville has become the hub of the tourist destination.


Supportive Council

Council and leadership figures continue to believe in and invest in the tourism sector.





RISKS
How will we recognize and mitigate or eliminate potential risks?



What are the key goals we would like to accomplish in order to achieve these results?

Lack of funding and leadership

Without municipal investment, the sector will not develop at a fast pace. There is a risk another Council may not be as supportive of the sector.

Covid-19

The pandemic has highlighted the fragility of the tourism sector. There is a risk the recovery will take longer than expected, or other global events will restrict growth.

Refusal to collaborate

Without successful partnerships, collaboration, and participation by local businesses to cooperate on marketing, product development, and training, progress will be stifled.

Proposed prison

Many residents and stakeholders are concerned that the correctional facility will negatively impact the brand reputation of North Grenville.

Brand confusion remains

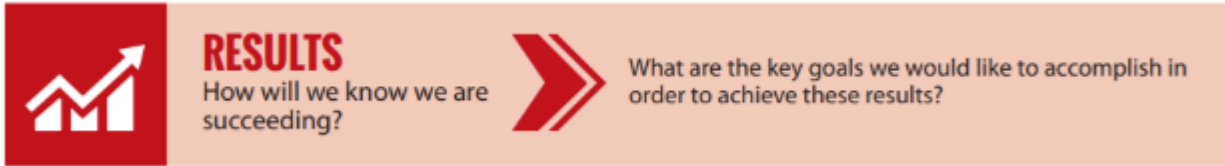
There is a risk that branding efforts will not be resolved, and visitors will continue to struggle to understand where North Grenville is located, even though marketing dollars have been spent to promote the unknown brand.

Residents fail to see the benefits of the tourism sector

Although survey data results are positive and residents say they support tourism, there is a risk of pushback if visitor numbers rise to become a nuisance. This has happened in some destinations which have experienced rapid growth. Ongoing communication is needed to reinforce the benefits of tourism. However, it is more critical the Municipality and the tourism industry manage the destination, the experiences, and the marketing in such a way that there are increases in revenue yields on an equivalent number of tourists, rather than merely trying to increase volumes.

Increased competition

North Grenville continues to see growing competition from neighbouring municipalities, reducing the potential to attract new tourism operators. Without efforts behind tourism development, North Grenville will continue to be overshadowed by Merrickville and southern destinations like Kingston and Brockville.



Tourism Strategy

This strategy is approved and actively used by tourism stakeholders to guide long term growth.

More resources for tourism

The Municipality – either through an increased line for tourism in its operating budget or supported by a Municipal Accommodation Tax – funds tourism development and promotion efforts.

Community Improvement Plan for tourism

A new Community Improvement Plan tailored for tourism businesses has been successfully implemented.

Tourism operator networking and training events

The Municipality coordinates ongoing get-togethers for all local tourism operators where they receive training, advice on support networks, and benefit from networking with other operators about potential collaboration opportunities.

Interconnected network of assets

An excellent network of assets that are linked and accessible, catalogued, and marketed, has been developed.

Location of new hotels

The attraction of several new hotels will be evidence there is a substantial visitor market.





Tourism Service Delivery Analysis

Tourism comprises “the activities of the person travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes,” according to the World Tourism Organization. The key phrase is “staying in places outside their usual environment.” Therefore, tourism activities for the purpose of municipal service delivery would be directed toward local stakeholders (businesses and organisations) that benefit primarily from tourists. Any marketing to tourists would therefore be directed to the communities in which the tourists live, not to audiences located in North Grenville.

The tourism service delivery analysis is based on an organisational review of tourism organisations to fully assess North Grenville’s current standing in the tourism landscape in reference to Regional Tourism Organization (RTO) 9 – branded as South Eastern Ontario – and other partner organisations.

How other jurisdictions deliver tourism services

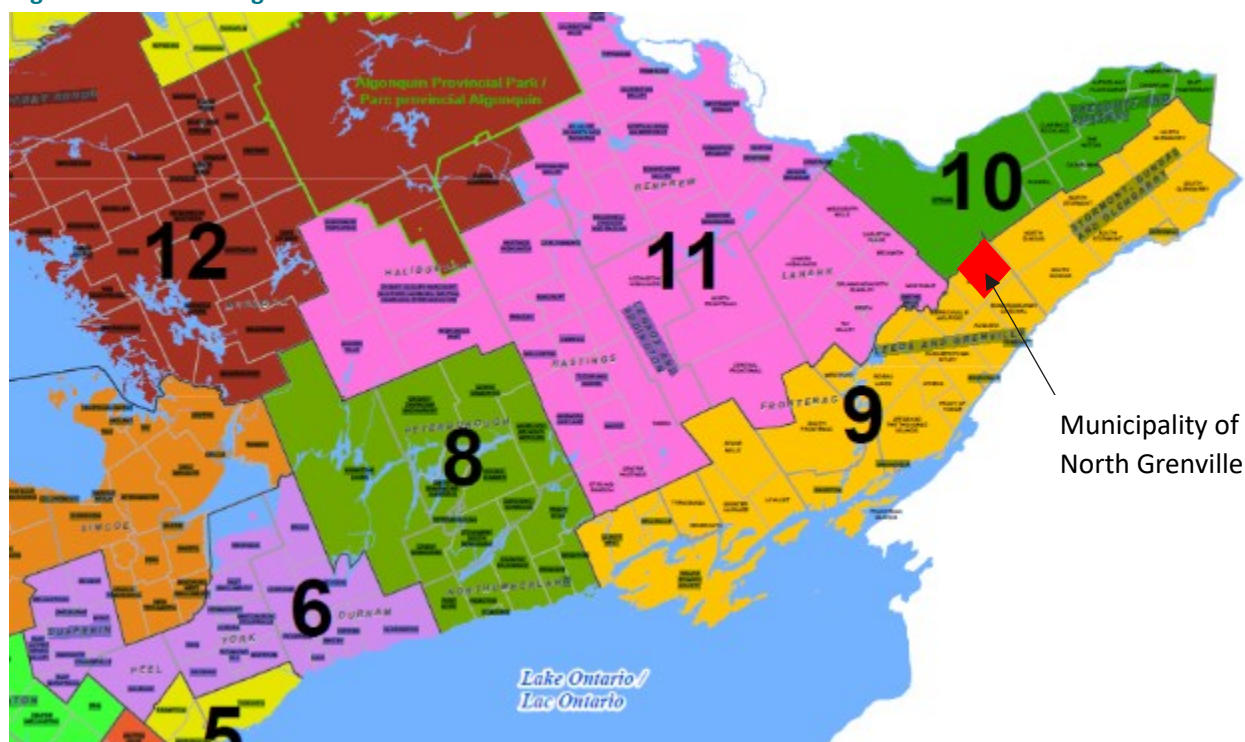
Tourism mandates can be found in all levels of government in Canada. Destination Canada is the nation’s tourism authority, with annual expenses of \$125.4 million (2019), of which \$113 million was spent on marketing and \$11 million on corporate services, strategy, and planning. Parliamentary appropriations funded \$95.6 million, with the remainder generated by partner revenues.

Destination Ontario is provincially funded, with a mandate to market Ontario as a travel destination, undertake joint marketing initiatives with the tourism industry, and support and assist the marketing efforts of the tourism industry. Destination Ontario is an agency of the Province of Ontario, with a 17-member board of directors, 84 staff, and an operating budget of \$35.1 million (2019-20), of which \$33.4 million is provincial government funding. Expenditures for the fiscal year included \$17.2 million for advertising and marketing, \$7.5 for administration, \$6 million for travel information centres, and \$4.8 million for the “Tourism Consumer Information System” website.



Apart from its situation in RTO 9, the Municipality of North Grenville is located at the intersection of South Eastern Ontario, Ontario's Highlands (RTO 11), and "Ottawa and Countryside" (RTO 10). See Figure 25. Ottawa Tourism is the Destination Marketing Organization for the City of Ottawa and area. It is a non-profit organisation governed by a 17-member board of directors, with 39 staff (as of May 2020). Ottawa Tourism is also Regional Tourism Organization 10, one of 13 RTOs in Ontario. In 2019, Ottawa Tourism had a budget of \$19 million (of which \$15.5 million was funded by a MAT). More than \$7.1 million was spent on marketing, \$3.3 million on business events, \$2.2 million on travel trade, \$1.8 million on administration. Spending has mainly been put on hold due to the pandemic.

Figure 25: Tourism Regions of Ontario



South Eastern Ontario (RTO 9) is a non-profit corporation governed by a 13-member board, with four staff (pre-Covid). This region includes the municipalities of Greater Napanee, Kingston, Leeds and Grenville, Prince Edward County, Quinte West, Stormont Dundas, and Glengarry. RTO 9 primarily uses the "South Eastern Ontario" brand, but also the "destinations" of Prince Edward County, Bay of Quinte, Lennox & Addington, Frontenac County, Kingston, 1000 Islands Gananoque, Brockville, Cornwall, and SDG Counties, and Rideau Canal (see Figure 26). North Grenville is considered part of the Rideau Canal destination, and specifically "Rideau Canal North" on the Parks Canada visitrideaucanal.com website. In 2019-2020, RTO 9 had a budget of \$1.9 million (\$1.7 million of which was funded by the Province of Ontario). More than \$878,000 was spent on marketing, \$453,700 on partnership funding projects, and \$277,000 on product development, and \$275,000 on administration.



Figure 26: RTO 9's destinations



Ontario's Highlands Tourism Organization (RTO 11) is a non-profit corporation with a ten-member board, funded primarily by the Province of Ontario. There is three staff. RTO 11 uses the brand "Come Wander" to encompass the Haliburton Highlands, Hastings County, Frontenac County, Lanark County, Lennox & Addington, and the Ottawa Valley. In 2019-2020, RTO 11 had a budget of \$1 million (\$950,000 of which was funded by the Province of Ontario). More than \$232,000 was spent on advertising, media, and public relations, \$180,000 on partnership funding projects, \$7,000 on product development, and \$437,000 on salaries and benefits, general administration, and governance.

Within its region, North Grenville is overshadowed by several well-known tourism brands: Prince Edward County, Kingston, 1000 Islands, and Bay of Quinte. Smaller nearby destinations such as Brockville, Merrickville, and Westport are worthy competitors in the tourism market.

Prince Edward County's tourism development and marketing programs are operated by this single-tier Municipality's Community Services, Initiatives and Programs Department. The department manages several other economic development tactics, including business retention and expansion, physician recruitment, real estate sales, investment and resident attraction, and customer service. Total expenditures budget for the entire "community development" department in 2020 was \$1.08 million (net levy).

Tourism Kingston is a non-profit corporation with a 15-member board and ten staff (pre-Covid). In 2018, Tourism Kingston had a budget of \$1.8 million, of which \$1.3 million came from municipal funding. \$192,000 was spent on marketing, \$188,000 on sports tourism, and \$120,000 on meetings, conferences, and travel trade, and over \$1.2 million on salaries and administration.

The Bay of Quinte Tourist Council is a non-profit corporation governed by a 10-seat board. In 2016-17, BQTC had a budget of about \$425,000, of which \$162,000 was funded by municipalities (over \$156,000 total from Belleville, Quinte West, and Hastings County), local chambers of commerce, and other agencies, with an additional \$239,500 budgeted to be raised from the tourism industry via cooperative marketing fees. BQTC planned to spend \$143,000 on marketing, and \$275,000 on staff, administrative expenses, and board and task group expenses.

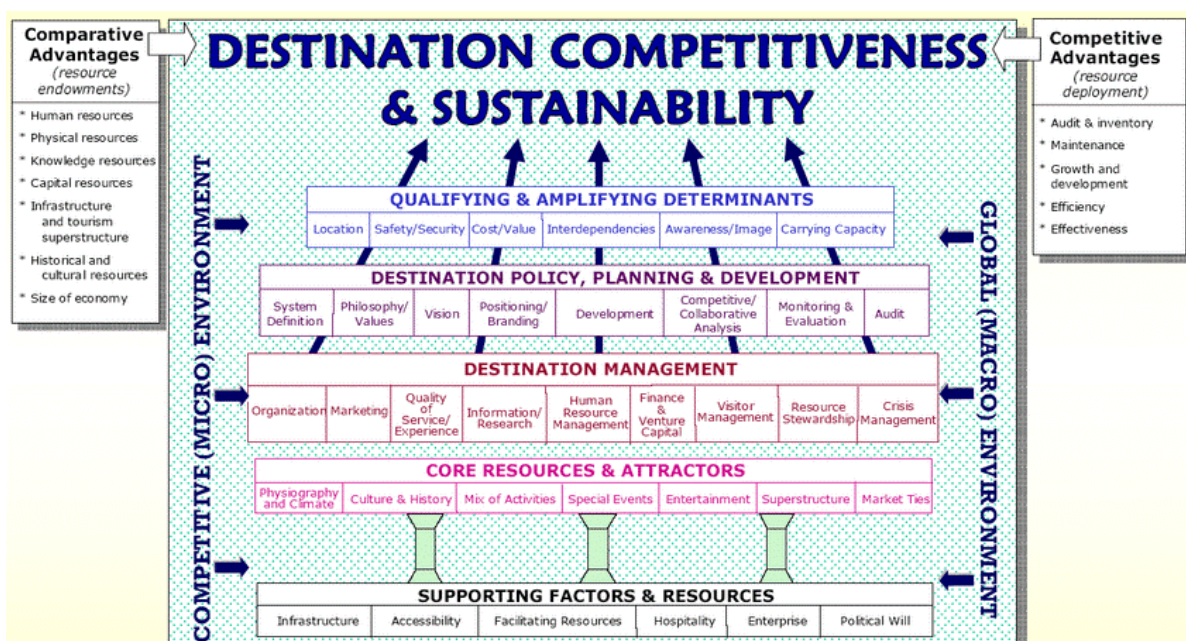


The Village of Merrickville-Wolford budgeted \$38,000 in 2020 for various economic development and tourism expenses, mainly related to events and streetscape decorations. Also that year, the Municipality received a Rural Economic Development (RED) grant, in addition to annual programs. The Merrickville-Wolford & District Chamber of Commerce also includes tourism marketing in its mandate and undertakes advertising initiatives regularly.

A model for destination competitiveness and sustainability

Using the Ritchie/Crouch Model of Destination Competitiveness/Sustainability (Figure 27), the plan identifies present and future opportunities for domestic, regional tourism markets, and international tourism markets once border restrictions are lifted. It focuses on tourism assets, marketing and service delivery, product development, and destination management.

Figure 27: Ritchie/Crouch Model of Destination Competitiveness / Sustainability



Destination management, according to the Ritchie/Crouch model, relates to the capacity for a community to control marketing, service experience, information and research, wellbeing of the destination, safety and security, finance and venture capital, human resource development, awareness and image, visitor management, resource stewardship, cost/value, and carrying capacity. The provincial government, upper and lower-tier municipalities, and their related agencies have several roles and responsibilities (infrastructure, health care, policing, etc.) for the community's benefit, and inasmuch that good management translates into a healthy and attractive community, then tourism can benefit as well. Community Improvement Plan incentives in public and private realms also help to enable destination development. As this Strategy was being developed, the Municipality of North Grenville was in the process of establishing a CIP.



Service delivery models

There are generally four structures used to deliver tourism services for a destination marketing organisation (DMO):

1. Municipal Tourism Department, with funds from the operating levy and/or MAT, using municipal staff and passive support from the tourism industry support. Council is ultimately in charge.
2. Municipal Tourism Department with Pay-to-Play Program for the industry, with funds from the operating levy and/or MAT, using municipal staff, matching funding from the tourism industry, such as annual fees and other charges, and a Council-appointed Advisory Committee. Council is ultimately in charge.
3. Municipally funded Tourism Contract, with funds from municipal grant and/or MAT, with funds flowing to an existing arms-length organisation with their staff or seconded municipal staff, additional funding from the tourism industry, and an arms-length board of directors reporting annually to Council.
4. Autonomous Tourism Association, an independent non-profit organisation, supported financially by tourism businesses, perhaps receiving a small grant from the Municipality, operated with little or no staff and/or volunteers, and an independent board of directors.

Option #2, Municipal Tourism Department with Pay-to-Play Program for the industry, is recommended for the Municipality of North Grenville.

Tourism Landscape Review

The tourism landscape review includes an overview of the regional, provincial, and Canadian inbound travel situation and any future predictions that may have been articulated by tourism authorities. In most cases, data is based on statistics gathered by Statistics Canada's Travel Survey of Residents of Canada and the International Travel Survey and prepared by the Ontario Ministry of Heritage, Sport, Tourism and Culture Industries (MHSTC). Statistics Canada and MHSTC no longer report data at the Census Division or Census Subdivision level. In most cases, the most recent data available is 2017. Specific tourism volumes and visitor spending are not available for North Grenville.

Canada's tourism industry, pre-Covid, was a \$105-billion industry, supporting 748,000 jobs directly and 1.9 million jobs in tourism-dependent industries. Tourism worldwide took an unprecedented hit in 2020, and recovery outlooks are not optimistic. "The Visitor Economy is facing an unprecedented collapse," said Destination Canada in its October 2020 State of the Industry Update. By June 2020, Canada had lost 354,000 jobs in the visitor economy, 47% of all jobs in that sector. The accommodation sector lost 74% of revenues in the second quarter of 2020.

The economic impact of Ontario's tourism industry is considerable. In 2017 (latest data available), the total Gross Domestic Product attributed to tourism was \$34.8 billion (including over \$11.6 billion from the U.S. and overseas), employing 401,206, and generating \$12.5 billion in government tax revenues.

For North Grenville's RTO, Number 9 known as South Eastern Ontario, visitors spent \$900.8 million in 2017, with \$74.9 million from overseas travellers.

RTO 10, Ottawa Tourism, estimated 2019 visitor spending at \$2.3 billion, of which \$762 million was international in origin. 2019 was a record-breaking year for the Nation's Capital. However, the Covid-19



pandemic has hit Ottawa hard. For 2020, total visitor spending is expected to fall to \$800 million.

RTO 11, Ontario's Highlands, recorded \$557 million in visitor spending in 2017, with \$23.6 million from overseas travellers.

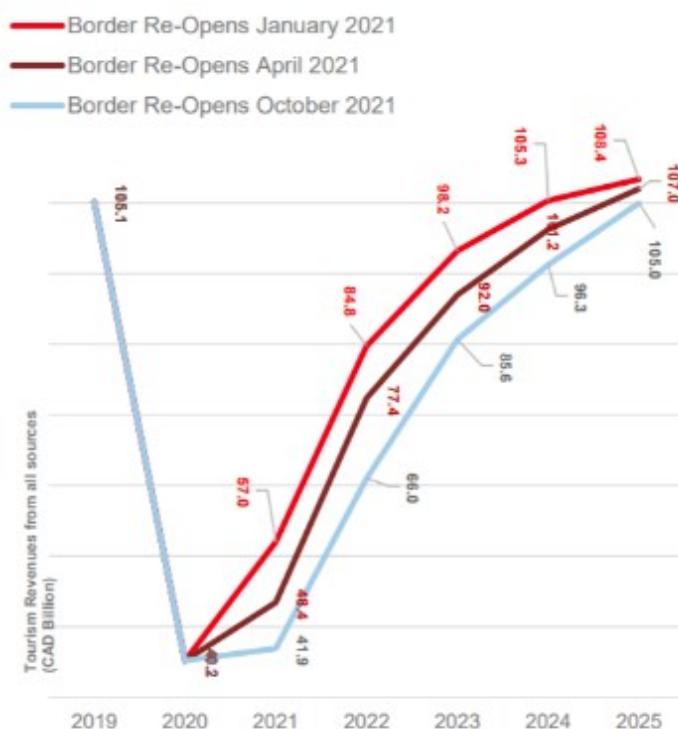
The Tourism Industry Association of Ontario (TIAO) has coordinated several industry surveys during the Covid-19 pandemic. In its October 2020 report, TIAO argued that earlier benchmark reporting underestimated the scale of loss in revenue that tourism businesses are suffering. A report by McKinsey report estimated that tourism businesses were suffering a 58% reduction in revenue, but a TIAO survey reported that the average revenue decline is higher at 69%.

Pent-up demand

In its November 2020 Visitor Demand Forecast (see Figure 28), Destination Canada estimates that if the border re-opens in January 2021 (highly unlikely), tourism revenues will increase from \$40B in 2020 to \$57B in 2021 and fully recover to 2019 levels by 2024. With a border re-opening in April 2021, tourism revenue is forecasted to reach \$48.4B in 2021 and to recover to 2019 levels by 2025. A border re-opening in October 2021, recovery to 2019 levels are not expected until 2026.

Destination Canada predicts the domestic tourism market will recover by 2022 if Covid-19 remains under control following the second wave. Redirecting outbound travel spending by Canadians to destinations within their own country will “blunt losses incurred from the loss of international visitors.” If the pandemic has waned to the point that the border can re-open in April 2021, then intra-provincial tourism spending should return to 2019 levels by May 2022.

Figure 28: Destination Canada's Tourism Recovery Scenarios





A survey conducted in October 2020 by Destination Canada reported 65% of Ontarians feel safe when thinking about travelling to nearby communities, and 53% feel safe when thinking of travelling within Ontario. However, at the same time, Ontarians' sentiment toward visitors decreased: 47% would welcome visitors from nearby communities, and 37% would welcome visitors from other parts of Ontario.

The head of Expedia Group is more optimistic, commenting in November 2020 that the process of worldwide tourism returning to normal, once a vaccine is implemented, will be less than the three to five years others are predicting.

A report by CIBC published in November 2020 indicates Canadian households are holding on to more than \$90 billion in excess cash, which is equal to four per cent of consumer spending. The report said the cash is likely being held by higher-income Canadians saving money on services like dining out. The head of portfolio management for investment company PIMCO Canada Corp. commented that consumers could "unleash a torrent of cash into the domestic economy once the Covid-19 pandemic is firmly in the rear-view mirror".

Ottawa Tourism predicted in fall 2020 that after the pandemic, pent-up demand from Montrealers and Torontonians would help kickstart the tourism sector.





Benchmarking Review

In developing the tourism strategy, a benchmarking review was also conducted. The purpose of the review was to provide insight on what comparable municipalities have done to develop a successful tourism destination. The three municipalities analysed, and selection rationale can be seen below:



United Counties of Stormont, Dundas, and Glengarry – Selected as a benchmarking comparator due to its similarities in urban/rural population mix, geographic proximity to North Grenville, and similar target market, SDG has been effective in its use of financial incentives to spur the tourism sector alongside well-executed online and offline marketing tactics.



Niagara-on-the-Lake – The Town was selected as it is an excellent case study on growing tourism within a region that is sandwiched by world-class tourism assets (e.g., the City of Toronto and Niagara Falls). This is a strong parallel to North Grenville's relationship with Ottawa. The town is also a highly developed tourism destination and so offers North Grenville a potential endpoint in terms of development potential.



Haldimand County – Located south of Hamilton on Lake Erie and the Grand River, Haldimand was selected as it is at a similar stage in its tourism development journey. Haldimand is mostly rural, and like North Grenville, is surrounded by more visited urban hubs. Over the past several years, the County has worked hard to increase its tourism presence developing several initiatives that align with North Grenville's tourism potential (e.g., mapping, brand design, trail integration, website enhancement, and financial incentives).

Benchmarking criteria and findings

Each benchmark community was analysed on a range of factors, including:

1. **Strategic tourism approaches** – Including analysis of tourism website effectiveness, social media presence, and marketing actions (e.g., visitor guides).
2. **Tourism strategy** – Evidence of an official tourism or economic development strategy and relevant actions.
3. **Budget information** – For marketing, product development, and capital investment, where available.
4. **Fees, taxes, incentives** – Use of destination marketing fees and/or municipal accommodation tax.
5. **Organisational roles and responsibilities** – Including a review of tourism services in terms of program delivery model, revenues, and expenses, where available.
6. **Use of emerging technologies** – such as integration of virtual or augmented reality into tourism product offerings.



Implementing financial incentives to stimulate growth

An overarching insight from the benchmarking review is the importance of creating financial incentive programs to stimulate the tourism sector. From an incentive perspective, ensuring that the Community Improvement Plan has supportive policies for tourism development is critical. Haldimand County offers the [Rural Business and Tourism CIP](#), which includes a range of property development incentives to business/property owners engaging in value-added agriculture, commercial roofed accommodations, as well as businesses operating in hamlets and heritage-designated buildings. The program offers numerous matching grants for eligible operators, from façade development to tax-based redevelopment grants for large-scale capital projects. Similarly, the [United Counties of Stormont, Dundas, and Glengarry](#) offer several tourism-related grant programs to improve regional signage and existing businesses to expand and attract more visitors. North Grenville's current redevelopment of its CIP program should draw on these initiatives.

Implementing a Municipal Accommodation Tax – the earlier, the better

From a tax perspective, Niagara-on-the-Lake offers a key learning regarding the importance of establishing a MAT early on in a region's tourism development journey. Niagara-on-the-Lake is currently [facing push back on plans to incorporate a MAT](#), with local operators believing it will harm potential visitation numbers. As a visitor-based tax, it is one of the most efficient ways for a municipality to gather funds to facilitate tourism development activities. Although North Grenville has limited established accommodations at this stage, early implementation of a MAT could avoid potential future push back and help to set the sector up for success.

Allocating the appropriate resources to facilitate growth

A common theme across all comparator communities was the importance of allocating appropriate financial and human resources to the tourism department to ensure strategic goals and objectives are achieved. Each of the comparator communities analysed commits a sizeable portion of their budget towards the tourism department (\$500,000+) through the hiring of staff members, funding allocation towards financial incentive programs, marketing and outreach programs, training and development, and product development. This analysis helped to form the tourism budget allocation recommendations included within the final strategy.

Being clear on growth goals

Niagara-on-the-Lake was an important comparator as it sets the bar in terms of tourism potential for North Grenville. When compared, Kemptville could be the Niagara-on-the-Lake equivalent for the City of Ottawa. By investing in developing local products, establishing strong regional partnerships (e.g., marketing), and growing agri-tourism related products, the growth potential for North Grenville could be similar. Niagara-on-the-Lake's tourism successes partly relied on attracting pre-existing tourism operators from the Niagara region (e.g., Whirlpool Jet Pool) and establishing a subsidiary locally. Additionally, the town successfully built a healthy range of culinary assets (e.g., wineries and breweries) and a major summer theatre (e.g., Shaw Festival) that ensure consistent visitation. However, Covid-19 highlighted the Municipality's overdependence on the tourism sector, indicating the importance for North Grenville to have a diversified economy.



Understanding the value of a brand

The North Grenville versus Kemptville brand dilemma is not unique. Many municipalities across Canada continually face brand recognition issues, primarily if there is a large established urban centre that conflicts with the renaming, allocation, or reclassification of a municipal district. For example, Haldimand County's recent tourism and economic development strategy outlined the need for a strong brand to raise the County's profile and differentiate it in the minds of prospective investors, visitors, and businesses to foster economic growth. This was primarily a tourism department led initiative which later gained the support of the entire county. In 2018, the County received funding from the Ontario Ministry of Agriculture, Food, and Rural Affairs (OMAFRA) Rural Economic Development Fund to conduct the brand strategy. Part of the rebrand involved the creation of a new tagline that celebrates what makes Haldimand a unique destination for both visitors and prospective investors. The new [Economic Development & Tourism tagline – Real. Potential.](#) – speaks to two elements of Haldimand County's character: authenticity and opportunity. For North Grenville, this example of brand strategy update and the incorporation of a tagline is a substantial opportunity to cater to both the North Grenville and Kemptville sides of the brand. Potentially accessing funding through OMAFRA to fund a more detailed brand review is another option.

Increasing website usability and map integration

Another important takeaway from the review was the potential of better integrating GIS mapping software with visitor guides. Haldimand County has made good progress on linking its [Trail and Pathways](#) with mapping software so that users can easily see what routes are available. Additionally, the County has made several day itinerary paths that are displayed on a [virtual map](#) and can be shared to Google Maps, allowing for easy smartphone integration. From a parks-and-recreation perspective, Haldimand County has also been working hard to connect its trail network with regional partners, including the Hamilton region and Norfolk County, to create a seamless tourism experience. It is important to acknowledge that North Grenville has made tangible progress on its tourism webpage and visitor guides. However, Haldimand County is a fine example of additional options that could be explored regarding integrating mapping software. This could be done in collaboration with the internal planning and parks and recreation departments.

Balance between offline and online digital marketing tools

All comparators have well-executed online and offline digital marketing tools, most of which North Grenville already successfully employs. However, one important takeaway is ensuring that any visitor guides developed are both downloadable as a PDF but also integrated onto the tourism webpage. For example, Haldimand County has developed a series of [printable PDF handouts](#), which are distributed throughout the Municipality and available on the website. However, they have also integrated these suggestions on the ['Things to Do'](#) and itinerary sections. Today's tourism consumers are highly reliant on their mobile devices when interacting with a destination. As such, the more digitised and mobile-friendly content that is produced, the more effective it will be.



Niagara-on-the-Lake is another great example of a municipality that has successfully built strong regional partnerships to help push marketing and communication messages. [Niagara Falls Canada](#), the regional agency, promotes the Niagara-on-the-Lake region strongly alongside the [Chamber of Commerce](#). Additionally, the municipality benefits from numerous external businesses and bloggers (e.g., TripAdvisor, Ontario Travel, etc.,) that provide detailed itinerary plans and inform potential visitors of events. The more external-based information sources that can be established, the more effective pull-marketing messages will be, due to increasing consumer trends that look for peer reviews before visiting a destination.

Tourism and technology integration

In creating the tourism strategy, it is also important to recognise current and future technology trends to better position North Grenville as an exciting destination both now and for years to come. Emerging technology trends that are relevant to the tourism sector include augmented reality, virtual reality, and chatbots. Augmented reality is important because it allows visitors to immerse themselves in a destination via their smartphones. Innovative applications of this technology that have been successfully employed include a virtual visitor tour of destinations, showcasing historical information of the region, and virtual visitor tour guides. From a chatbot perspective, several destinations are using chatbots in place of a visitor information centre, with pre-programmed questions and responses being integrated into a tourism Facebook page or marketing campaign. This automated software can then reply to visitor inquiries in real-time, using modern, everyday language.



