

**1000 Islands Gananoque  
Chamber of Commerce**

**Premier Ranked Tourist Destination Project**

**FINAL  
October 12, 2007**

**Prepared by**

**BRAIN TRUST**  
MARKETING & COMMUNICATIONS

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## **Acknowledgements**

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1000 Islands Gananoque Chamber of Commerce acknowledges and thanks the many tourism business operators and industry colleagues who contributed to the success of the 1000 Islands Gananoque Premier Ranked Tourist Destination Framework.

### **1000 Islands Gananoque Chamber of Commerce Board of Directors**

- President - Alicia Vandine, The Perfect Place for Gifts and Collectables
  - Vice President - Lori Higgs, Best Western Country Squire Resort
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  - Lisa Wells, Islandview B&B
  - Anne Warren, Town of Gananoque Councillor
  - Charlie Kellington, TLTI Councillor

### **1000 Islands Gananoque Premier Ranked Advisory Committee**

- Gayle McBride - President (at the time) Chamber
- Alicia Vandine - Vice-President (at the time)
- Emily Bell - Co-Chair BIA
- Suzanne Rivard - Co-chair BIA
- Kent Fitzhugh - Economic Development Officer Town of Gananoque
- Julie Salter Keane - Director of Planning and Development TLTI
- Frank Kinsella - Councillor Town of Gananoque (at the time)
- Douglas Mackintosh - Councillor TLTI (at the time)

### **Ontario Ministry of Tourism:**

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This project was facilitated in partnership with Service Canada (now Employment Ontario) and the Ontario Ministry of Tourism.

## **Background**

The Premier Ranked Tourist Destination program was an initiative developed by the Ontario Ministry of Tourism under its Ontario Tourism Strategy in 2004. The goal of the PRTD program is to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage and ultimately improve to become a destination of choice. Being a Premier Ranked Tourist Destination indicates that “here is a place more attractive than the rest, a place the potential tourist visitor should consider first in making travel plans.” To be clear, Premier Ranked is not a formal tourism designation but rather is an internal tourism goal for a destination to work towards as it relates to becoming “better than the rest”.

To assist municipalities with assessing and developing their tourism product, the Ministry of Tourism established a tool called the Premier Ranked Tourist Destinations Framework. This framework assists jurisdictions in assessing their tourist assets, attractions and amenities and allows them to identify opportunities in tourism development. The Ministry of Tourism provides financial assistance to regions that successfully apply to undertake the PRTD process.

Several regions in Ontario have completed PRTD projects including the Regional Municipalities of Halton, Niagara, York, Prince Edward County, Muskoka and Durham. The cities of Mississauga, Hamilton and Kingston have also completed their PRTD assessments and have used the results of their studies in the development of comprehensive tourism plans. The City of Toronto is currently underway with their PRTD assessments.

The 1000 Islands Gananoque PTRD project is an initiative facilitated by 1000 Islands Gananoque Chamber of Commerce in partnership with the Town of Gananoque, the Township of Leeds and The Thousand Islands, the Ontario Ministry of Tourism, Service Canada (now Employment Ontario), and tourism industry stakeholders. The funding for the project came from three sources – 1000 Islands Gananoque Chamber of Commerce, Employment Ontario, and the Ontario Ministry of Tourism.

It should be understood that the PRTD project is a shared initiative of both individuals in the tourism industry in 1000 Islands Gananoque and the 1000 Islands Gananoque Chamber of Commerce and the organizations it represents. The successful implementation of the recommendations is based on a thorough understanding, appreciation, engagement and endorsement from both the private and public sector partners. This is not an initiative of government, at any level. It is a shared process undertaken by industry and government, both must accept the accountability for delivery if it is to be viewed as productive over the long term. At the outset the 1000 Islands Gananoque Chamber of Commerce Board of Directors understands this responsibility.

A 1000 Islands Gananoque PRTD Advisory Committee, made up of representatives from municipal governments, local tourism partners and industry stakeholders was established to direct and guide the development of the overall project. Through funding from Employment Ontario, contract staff was hired to assist in the development and completion of the PRTD resource audit.

The resource audit was carried out in the form of a detailed survey of 1000 Islands Gananoque establishments which asked respondents to describe their operations, services offered, customer base and tourism awareness among others. The survey was mailed to 1000 Islands Gananoque establishments from the accommodations, food and beverage, attractions and retail sectors. Survey results were compiled in a comprehensive database maintained by the PRTD Audit Team and shared with local tourism partners.

To assist the PRTD Steering Committee with the analysis of the audit results and preparation of the final report, a tourism consulting firm was retained in January 2007. The consultant worked with the PRTD Steering Committee and chamber staff to review the results, assess current industry strengths, weaknesses, attributes, product/service gaps, factors and conditions that impact existing and future development plans. They also identified potential opportunities and partnerships within the tourism industry.

- Intro meeting conducted with Chamber Board – March 22
- Data reviewed and DRAFT observations developed
- Presented DRAFT Findings to Chamber Board – April 18
- Presented DRAFT Findings to Industry Group – April 24
- Received feedback and affirmation
- Recommendations to Advisory Committee – May 9
- Received feedback and affirmation
- Recommendations to Board, Industry Group – May 24

A PRTD Introduction meeting was held with the Chamber Board on March 22<sup>nd</sup>. Initial findings from the audit, together with identification of the key tourism attractors were presented to the Chamber Board on April 18<sup>th</sup>. A presentation was made to the local tourism industry on April 24<sup>th</sup>. Based on the feedback and comments received from the Board and the industry at these sessions, recommendations for inclusion in the final report were presented to both the Board and industry group on May 24<sup>th</sup>, 2007.

It can be safely said that as a result of this consultative process the tourism industry in 1000 Islands Gananoque has endorsed the recommendations contained in this report. It is the culmination of many hours of diligent work, dialogue and discussion. This report contains key recommendations that if implemented, will have a positive impact on all of those who live, work and visit 1000 Islands Gananoque.

## **Introduction**

### **What is the Premier Ranked Tourist Destination Framework Process?**

The Premier Ranked Tourist Destination Framework (PRTD) was developed by the Ontario Ministry of Tourism to provide a framework for tourism destinations across Ontario to define their competitive position within the tourism marketplace on domestic and international levels.

**“Premier ranked is defined as:  
“A place more attractive than the rest, a place the tourist  
should consider first when making travel plans.”**

The Ministry of Tourism developed a resource audit and workbook format that outlines the attributes/factors/conditions that are considered prerequisites for a tourist destination to be considered serious in building the economic well being of its destination in order to grow tourism revenues for the destination and its tourism shareholders.

The workbook format provides a simple methodology that communities can follow to ensure consistency, accuracy, and maximum involvement of the key tourism and economic development stakeholders in the process. The workbook emphasis is on enabling any tourist destination of any scale to operate at the highest possible level it can achieve – not necessarily in competition with other operators, but in a complementary context within that particular destination. It should be noted that being or moving to being Premier Ranked IS NOT an official designation or grading. It is simply a process designed to help destinations improve their viability and competitiveness as a place visitors want to visit.

There are three specific dimensions of tourism assessment included in the study:

#### **1) The Product Dimension**

A Tourist Destination provides a high quality tourist experience, enabled through the destination’s offerings of:

- Distinctive Core Attractions
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- An Accommodations Base

#### **2) The Performance Dimension**

The quality of the tourist experience and the destination’s success in providing it is validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim

### **3) The Futurity Dimension**

The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

The process involves several critical steps along with a serious commitment and investment of time by industry partners. This investment of time and energy is rewarded with specific insights and direction. At its conclusion, the Premier Ranked Tourist Destination research project provides:

- A database of critical baseline tourism business data
- An understanding of 1000 Islands Gananoque destination status in the global tourism marketplace and opportunities and challenges constraining that status
- A solid base for preparing a long-term regional tourism strategy
- Product development and partnership opportunities
- Recommendations that support the growth and sustainability of the tourism sector
- A foundation to attract tourism investment and create employment opportunities.

The additional benefit of this methodology is the mobilizing of an expanded and more capable network of industry stakeholders. By working through this process stakeholders will have a more cohesive focus for solving current and future challenges that face the destination.

### ***Why 1000 Islands Gananoque?***

The desire of the 1000 Islands Gananoque Chamber of Commerce is to improve as a destination that attracts an ever growing number of tourists on behalf of its membership. The Chamber determined a number of reasons for undertaking the PRTD project and they include:

- To determine the current state and on-going potential for tourism in 1000 Islands Gananoque
- To capitalize and leverage investments made by the industry in recent product and infrastructure development
- To identify and affirm areas for future product development
- To increase overall revenues of tourism operators in 1000 Islands Gananoque

### ***Starting from a Position of Strength***

The Premier Ranked Tourist Destination process is designed to identify the areas where improvements are required. That being said this work has been done against the backdrop of an area that is starting from a position of strength. The 1000 Islands Gananoque area has long been a tourism engine for the entire 1000 Islands. There are many tourism businesses that have been in operation for more than 50 years and have truly established themselves as mainstays in the tourism industry, attracting hundreds of thousands of visitors over the years.

Positioned as the gateway to the 1000 Islands, Gananoque and the surrounding area have developed the infrastructure to support increased visitation and thriving tourism activity. Recent investments have been made specifically in the accommodation sector. As well, the OLG Casino 1000 Islands has provided a new reason for visitors to travel to Gananoque. Many other factors contribute to the areas viability as a tourism destination and include:

- A number of appealing visitor experiences can be found that have appeal to a varied audience and include the Thousand Islands Playhouse, the casino and the charming small town streetscape with shopping and dining options
- A fleet of cruise ships that log 350,000+ person trips annually and offer visitors an entertaining and informative tour of the St. Lawrence River and the 1000 Islands
- An anchor attraction in the OLG Casino 1000 Islands that offers visitors year-round gaming excitement
- A solid accommodation base with 742 rooms, many new or recently renovated
- 6.3+ million people living within 3 hours that affords the destination with a significant market to draw from
- Participation in the 1000 Islands St. Lawrence Seaway Tourism Marketing Partnership, which includes:
  - Brockville and District Chamber of Commerce
  - Cornwall & Seaway Valley Tourism
  - Kingston Economic Development Corporation
  - OLG Casino 1000 Islands
  - 1000 Islands Community Futures Development Corporation
  - 1000 Islands International Tourism Council
  - Grenville Community Futures Development Corporation
  - Ontario Ministry of Tourism
  - Parks Canada
  - St. Lawrence Parks Commission

### ***Project Process***

Completion of the Premier Ranked Tourist Destination project framework is based on the Audit Team facilitating the following four step process:

#### **Step One: Data Base Design and Collection**

- A database of “potential” tourism businesses was created and 270 questionnaires were delivered to companies representing the accommodation, food and beverage, attraction, heritage and cultural, campgrounds & parks, marinas, golf, transportation, retail, events, festivals and outdoor adventure sectors.
- 220 surveys were completed, representing a response rate of 81% - which is equal to or better than results achieved in other regions in Ontario and considered more than acceptable for the purpose of the work
- The survey data was accumulated, entered, clarified, analyzed and evaluated using the PRTDF workbook and the Tourism Resource Opportunity Matrix

## **Step Two: Evaluation of the Product, Performance and Futurity Dimensions**

- Each of 118 measures in the PRTD Workbook were completed using the survey data
- Third party research was also utilized to supplement survey data
- The Transportation Resources Checklist was completed. Information necessary to complete the checklist was drawn from commonly held knowledge or perceptions by area tourism stakeholders, committee and industry sessions, and through direct contact with attractions, taxi and transit service providers.
- The Travel Trade Resource Checklist was completed in consultation with area attractions and tour operators. Trade association directories helped to identify the relevant operators required to complete the checklist. Additional information was collected by contacting operators to discuss matters raised by the checklist.

## **Step Three: Completing the Destination Performance Summary**

- The consultant presented an initial summary of findings to the Board of the 1000 Islands Gananoque Chamber of Commerce and the Premier Ranked Steering Committee for reactions and comments
- Additional work was undertaken to fill in information gaps and supplement initial findings, some gaps were not filled due to lack of information
- Preparation of preliminary recommendations

## **Step Four: Present Summary Findings, Recommendations, Final Report**

- Tourism businesses were invited to several presentations to validate findings and recommendations, their comments and feedback were reflected in the on-going development of the final report

## EVALUATION PROCESS

Throughout this report symbols are used to indicate the performance rating of each section as determined by the survey data provided by the participants in the process.

The symbols are as follows:

- *Yes, the affirmation can be made and supported for the destination*
- ◐ Almost - the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation
- *No, the affirmation cannot be made or supported for the destination*

1000 Islands Gananoque performance is assessed by a series of measures specific to the Product, Performance and Futurity dimensions of the destination. The first part of the measure is in the form of a statement, found in the PRTD Workbook, with an implicit question asking whether you can affirm the statement as “true,” “almost true,” or “not true yet” for the destination. It is answered with a “Yes”, “Almost”, (“A”) or “No”. The second part asks for the facts that substantiate the answer to the first. The responses to the questions are recorded with a check mark in the appropriate box (Yes, “A” or No) on the work page, and transferred to the Performance Summary Form provided in the Workbook.

The Performance Summary Form (below) displays the logical structure of the Framework. Being a “Premier Ranked Tourist Destination” requires success across the Product, Performance and Futurity Dimensions. As illustrated to the left, each dimension is supported by Elements, denoted by the letters A to K. Each element has a series of consecutively numbered Criteria as in A1, A2 etc. Each criterion is supported by Measures, denoted by lower case Roman numerals. As an example, the Product dimension’s element A - Distinctive Core Attractions has two criteria, A1 and A2. The first has ten measures, the second has four. Element B - Quality and Critical Mass has seven criteria, each of which has two to four measures.

Performance Summary Form

<b>DIMENSION</b>	→	<b>PRODUCT</b>		
<b>Element</b>	→	<b>A. Distinctive Core Attractions</b>		
<b>Criteria</b>	→	<b>A1</b>	<b>A2</b>	
<b>Measures</b>	}	A1.i	A1.vi	A2.i
		A1.ii	A1.vii	A2.ii
		A1.iii	A1.viii	A2.iii
		A1.iv	A1.ix	A2.iv
		A1.v	A1.x	A2.v
<b>Element</b>	→	<b>B. Quality and Critical Mass</b>		
<b>Criteria</b>	→	<b>B1</b>	<b>B4</b>	<b>B6</b>
<b>Measures</b>	}	B1.i	B6.i	B6.i
		B1.ii	B6.ii	B6.ii
		B1.iii	B6.iii	B6.iii
		B1.iv	B6.iv	B6.iv
<b>Criteria</b>	→	<b>B2</b>	<b>B5</b>	<b>B7</b>
<b>Measures</b>	}	B2.i	B5.i	B7.i
		B2.ii	B5.ii	B7.ii

# **PRODUCT**

## **Evaluation Rating for 1000 Islands Gananoque**

The **Product** components, criteria, and measures address the features that enable a destination to offer a high quality tourist experience enabled through the destination's offerings of:

- *Distinctive Core Attractions*
- *Quality and Critical Mass*
- *Satisfaction and Value*

The following product characteristics reveal 1000 Islands Gananoque product attributes:

### **Distinctive Core Attractors**

This section assesses what it is about a destination that makes it stand out and distinctive, how the attractors are distinguished and how they are relevant to market wants. The evaluation process has identified 1000 Islands Gananoque core attractors, their distinctiveness, and the nature and size of the visitor markets to which they are to be considered to be attractive.

**Core attractors** should meet at least two of the following criteria:

- *Attract a significant number of visitors annually*
- *Have a physical or historical link to the destination*
- *Be a destination landmark*

### **1000 Islands Gananoque Distinctive Core Attractors:**

- **1000 Islands & St. Lawrence River Experience**
- **Natural Countryside & Rural Towns**
- **Thousand Islands Playhouse**
- **OLG Casino Thousand Islands**

#### **1000 Islands & St. Lawrence River Experience**

A picturesque water based attractor comprised of a variety of seasonal activities including a large fleet of tour ships (350,000+ trips), opportunities for pleasure boating, sailing, canoeing, kayaking, scuba diving, sport fishing and ice fishing.

- St. Lawrence Islands National Park
- Accessible islands
- UNESCO Frontenac Arch Biosphere Reserve – a “green” tourism designation

#### **Natural Countryside & Rural Towns**

The area features accessible natural landscapes that offer outdoor activities including hiking, cycling, canoeing, hunting, birding, camping, and golf. Charming rural towns can also be found that offer heritage experiences and annual festivals & events. The area also has many campgrounds and RV parks that offer overnight accommodation – 478 sites.

### **Thousand Islands Playhouse**

The Playhouse has provided a variety of theatre performances for many years and has become known as the most successful professional live theatre in the 1000 Islands. The Playhouse has two performance venues, the Springer & Firehall Theatres, and both are located in close proximity to the picturesque St. Lawrence River. The company features May – November performances and has an annual line-up of appealing shows that cater to a large market segment. The Playhouse offers attractive group rates and partners with a number of attractions in the area to provide an all-inclusive performing arts experience.

### **OLG Casino Thousand Islands**

The thrill of gaming can be found at the beautiful OLG Casino Thousand Islands. Located just off Highway 401 and minutes from the attractions of the Town of Gananoque and the St. Lawrence River, the casino serves up non-stop excitement. It features more than 500 slot machines and a variety of table games including Texas Hold 'Em Poker Blackjack, Let It Ride, Caribbean Stud Poker, Craps and Roulette to keep players off all levels entertained. The casino also offers guests dining opportunities in Oscar's Marina Grill.

### **More about the Distinctive Core and Supporting Attractors**

1000 Islands Gananoque distinctive attractors are part of a regional complex linked to the physical setting of the area. Gananoque and 1000 Islands and the Township of Leeds (Seeley's Bay, Lansdowne, and Rockport) comprise the area of focus.

The **physical** linkages are best connected to the core attractors as follows:

#### *1000 Islands and the St. Lawrence River Experience*

- The area sits on Frontenac Axis, an arch of Precambrian rock that connects the Canadian Shield to the Adirondack Mountains of New York state. This arch divides the Great Lakes lowlands from the Ottawa valley. The islands and unique land formations are a result of glacier action on the bedrock of the Precambrian shield. Natural ecosystems thrive in this area
- The St Lawrence Seaway is a system of canals and locks that permits ocean-going vessels to travel from the Atlantic Ocean to the Great Lakes. The seaway officially extends from Montreal to Lake Erie, including the Welland Canal. The Seaway plays a significant role in the transportation of goods

The **historical** linkages are best connected to the core attractors as follows:

#### *Heritage and Living History*

- The area was the playground of the rich and famous
- The area is the Garden of the Great Spirit to native North Americans and a refuge of Loyalists who settled and defended the area
- The importance of the area during industrialization and the great importance the river held in the transport of goods and people in both directions
- The St Lawrence Seaway with a system of locks and canals which opened the way for large ships to move between the Great Lakes and Montreal without the need for trans-shipment of cargo

- This history is evidenced by native anthropological sites, forts, battlefields, mansions, railways, mills, shipwrecks and light houses

While core attractors offer *collective appeal* there are other destinations that offer similar products and experiences.

<b>Competitive Destination</b>	<b>Distance (KM)*</b>
Brockville (1000 Islands/St. Lawrence River)	50 km
Kingston (1000 Islands/St. Lawrence River)	25 km
Cornwall (1000 Islands/St. Lawrence River)	100 km
Ottawa (historical / cultural heritage)	120 km
Niagara Region (historical heritage)	460 km
Prince Edward County (waterfront experience / historical heritage)	120 km
U.S. sites on the St. Lawrence River, Alexandria Bay for example	30 km

The tourism industry in 1000 Islands Gananoque does benefit from its geographic proximity to Toronto, Montreal and Ottawa; a reasonable drive from these major centres. As a result many visitors to Toronto, Montreal and Ottawa choose to also include a trip to the 1000 Islands to experience all that is available.

It can be said that the destination does stand out from its competition. 1000 Islands Gananoque is distinct because the unique offerings which include:

- Heritage sites of national significance
  - St. Lawrence Islands National Park
  - Mill on the Gananoque River erected by Sir John Johnson
  - Mill on the west bank of the Gananoque River erected by Joel Stone
  - Summer resort on Hay Island built by Jacob Duetta in 1895
  - Halfmoon Bay
  - Landon Bay – important outlet for the timber
  - Darlingside – east of Thousand Island Bridge for its cultural treasures
  - Christ Anglican Church
  - Pump House
  - Athlone Inn
  - Prameter House
  - Victoria Rose Inn
  - Skinner House
  - Trinity House Inn
  - King Street Bridge and Toll House
  - Hudson Bridge
  - John MacDonald House also known as Town Hall
  - Confederation Park
  - Lyndhurst Bridge
  - Fire Hall

- Confederation Park, Canada's largest outdoor contemporary art exhibit displaying sculptures leased from the Art Bank in Ottawa
  - John Bracken's Home – Ellisville Road – plaque
  - Lansdowne Fair Ground
  - Gananoque Inn
  - St. Lawrence Statute
- Architectural Heritage Sites:
    - The Stone Street Bar & Grill
    - The Town Hall
    - Old Post Office
    - Clock Tower
    - Old Foundry
    - Band shell
    - 11 Church Street (single family dwelling)
    - 145 Stone Street South (single family dwelling)
    - 120 King Street West (single family dwelling)
    - St. John the Evangelist Roman Catholic Church
    - Stone's Mill
- Spectacular scenery - the 1000 Islands Parkway and the Frontenac Axis offers unique landforms, scenic rugged landscapes and sightseeing opportunities
  - Charleston Lake Provincial Park
  - The area is part of the UNESCO Frontenac Arch \*Biosphere Reserve

\*Biosphere Reserves are areas of terrestrial and coastal ecosystems promoting solutions to reconcile the conservation of biodiversity with its sustainable use. They are internationally recognized, nominated by national governments and remain under sovereign jurisdiction of the states where they are located. Biosphere reserves serve in some ways as "living laboratories" for testing out and demonstrating integrated management of land, water and biodiversity. Each biosphere reserve is intended to fulfill three basic functions, which are complementary and mutually reinforcing:

- A conservation function - to contribute to the conservation of landscapes, ecosystems, species and genetic variation;
- A development function - to foster economic and human development which is socio-culturally and ecologically sustainable;
- A logistic function - to provide support for research, monitoring, education and information exchange related to local, national and global issues of conservation and development.

Biosphere Reserves are designed to meet one of the most challenging issues that the World is facing today: How can we conserve the diversity of plants, animals and micro-organisms which make up our living "biosphere" and maintain healthy natural systems while, at the same time, meet the material needs and aspirations of an increasing number of people? How can we reconcile conservation of natural resources with their sustainable use? Biosphere reserves have been designed as tools for reconciling and integrating the conflicting interests and pressures that characterize land-use planning today.

In terms of guest experience 1000 Islands Gananoque can't claim that its experience is superior in terms of overall satisfaction. The destination could offer a more positive visitor experience by addressing the seasonal availability of its attractions which limit the visitor experience in the shoulder and off seasons. It could also address inconsistency in experience delivery as it relates to quality, experience upgrades and development and overall customer service. These factors contribute to a less than superior overall guest experience.

The destination has not done guest surveys to monitor levels of satisfaction. It does have a visitor comment book in its visitor centre and visitors do offer unsolicited comments, many are very positive and speak to guest experience in an anecdotal context.

Although the destination and members of its tourism industry understands tourism and the role of destination marketing and servicing the visitor market it does not have a product positioning statement that describes in consumer terms its product offering or experience.

1000 Islands Gananoque products and experiences have both “mass” and “niche” appeal.

<b>Market.</b>	<b>Appeal</b>	<b># of Trips in Ont.</b>
Visiting friends and relatives	Mass	28,791,781
Touring families	Mass	3,718,208
Cultural Performances	Mass	3,267,180
Boaters	Niche	4,575,108
Corporate Travel	Mass / Niche	4,350,799
Golfers	Niche	1,667,525
Anglers	Niche	3,594,086
Cycling	Niche	1,336,465
Campers	Mass	Not available
Hunters	Niche	263,407

Source: 2004 CTS/ITS

These attractors appeal to guests from beyond Ontario’s borders and their appeal can best be described as follows:

<b><u>Attraction</u></b>	<b><u>Appeal</u></b>
Cruises (mass)	- Experience being on the water to see sights unique to the area
Sightseeing (mass)	- Enjoy the scenic beauty of the islands, river and rural areas
SCUBA (niche)	- fresh water diving with no thermoclines in an area with an abundance of wrecks, historic and natural points of interest
Boating (niche)	- the St. Lawrence River offers a playground for boaters with a variety of bays, islands, points of interest and navigational challenges
Live Theatre	- a professional theatre company, the 1000 Islands Playhouse offers a variety of entertaining musicals, drama, comedy annually with appeal to regular theatre goers as well as occasional theatre patrons
Corporate Travel	- convenient location between Ottawa, Montreal, Toronto and close to international bridges
Angling (niche)	- a wide variety of sport fish species in diverse aquatic habitats including protected bays, piers/docks, deep water, islands and shoals

Cycling	- part of the 1000 Islands Parkway bicycle path an appealing cycling corridor, and lots of opportunity to ride quiet back roads in a picturesque rural area
Hunting (niche)	- variety of small game, water fowl and uninhabited terrain
National Park (mass & niche)	- St Lawrence Islands National Park, Canada's second smallest national park contains many islands as well as a visitor centre on the mainland. Much of the park is accessible by boat and some islands have picnic and camping facilities.

The market segments for which these attractors have appeal have been identified and can best be described as follow:

<b>Experience</b>	<b>Descriptor and Market Data</b>	
Outdoor Activists (such as Divers, Cyclists)	Percent of Travelers (Canada): Average Age: Dominant Age Range: Household Income: Post-Secondary Education:  Occupation Status:  Dominant Life Cycle Stages:	5.4% 32.9 years 18 – 45 \$51,700 68% University / College 10% Advanced Degrees 68.6% Employed 11.8% Self-employed Young singles Young couples Young families
Boaters	Not available	
Golfers	Percent of Travelers (Canada): Average Age: Dominant Age Range: Household Income: Post-Secondary Education:  Occupation Status:  Dominant Life Cycle Stages:	5% 48.1 years 26 – 65 \$80,500 74.5% University / College 12.9% Advanced Degrees 52.8% Employed 20.8% Retired Senior couples Mature couples Young families Mature singles
Anglers / Hunters	Percent of Travelers (Canada): Average Age: Dominant Age Range: Household Income: Post-Secondary Education:  Occupation Status:  Dominant Life Cycle Stages:	5.1% 42.% years 26 – 55 \$53,500 46.4% University / College 6.4% Advanced Degrees 55.8% Employed 14.7% Self-employed Mature families Young families Mature couples

Source: Lang Research – TAMS 2006

1000 Islands Gananoque core experiences are not available on a year-round basis and therefore do not provide opportunities to extend traditional peak travel times into the shoulder seasons.

### Quality and Critical Mass

*This section addresses the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging in core and related activities as well as entertainment, dining, and shopping. The evaluation process has assessed the size of 1000 Islands Gananoque activity and amenities base and the quality of its entertainment, dining and shopping offerings.*

1000 Islands Gananoque does offer visitors some experiences that are considered to be memorable. The area offers a variety of different activities and attractions, however few could be considered unique but do have characteristics that are memorable, for example the theatre and cruise ship experiences are not unique but could be considered memorable by some guests.

Generally speaking 1000 Islands Gananoque offering of core attractors and on-theme activities do not generate visitation for periods greater than 24 hours. With the exception of diving experiences most don't require guests to stay overnight in the destination as detailed below:

Activity	Duration
Thousand Islands Playhouse	2 hours
OLG Casino 1000 Islands	3-5 hours
Cruise	3-5 hours
Diving	1-2 days
Festivals of the Islands	3-5 hours
Museums / Historic Sites	1-2 hours
Boating	1-2 days
Shopping	1-2 hours
Tours / Excursions	1-4 hours
Fishing	1-3 days

\*Source, PRTD Industry Survey, 2006.

1000 Islands Gananoque core and on-theme experiences for the most part are not available on a year-round basis and therefore do not provide opportunities to extend traditional peak travel times into the shoulder seasons.

Activity	Season
Historic Sites	Spring/Summer/Fall
Boating	Late Spring, Summer, early Fall
Boat Cruises	Late Spring, Summer, early Fall
Casino/Gaming	Year-round
Fishing	Year-round
Sightseeing	Spring/Summer/Fall
Diving	Summer/Fall

Festivals & Events	Spring/Summer/Fall
Shopping	Year-round
Culture Performing Arts	Spring/Summer/Fall

Source: PRTD Industry Survey, 2006

1000 Islands Gananoque product offerings are easily accessed or purchased from outside the region. Accommodations can be pre-arranged and tickets or admissions to attractions, tours, cultural and recreation events or activities can be purchased, via a 1-800 number or at the Visitor Centre. There is a central website for the destination with a list of activities where a visitor could pre-plan an itinerary.

1000 Islands Gananoque products and experiences are available to visitors at a variety of price points, the range being from free to \$75

Activity	Approximate Price Range
Cruises	\$8 - \$25
Diving	\$25 – \$75
Festivals & Events	Free - \$24
Theatre & Performing Arts	\$15 - \$32
Golf	\$16 - \$30
Fishing	Free - 1 person ½ day charter -\$200.00 2 person full day charter - \$350.00 2 person ½ day charter - \$250.00 3 person full day charter - \$400.00 3 person ½ day charter - \$300.00
Boat Rentals	Single Sea Kayak - \$15.00/hr, \$25.00/1/2 day; \$40.00/day; \$189.00/wk Tandem Sea Kayak - \$20.00/hr; \$35.00/1/2 day; \$55.00/day; \$269.00/wk Tour including kayak – half day 3 hours \$59.00, full day 5 hours \$95.00  Motor Boat - \$115.00 - \$170 1/2 day \$155 - \$235/day, \$700 - \$1175/week
Museums	\$2 to \$12

Source: PRTD Industry Survey, 2006

1000 Islands Gananoque offers visitors a range of activities encompassing a variety of price points and layers of added value. These activities include product experiences that provide opportunities for relaxation, entertainment, interpretation, education, cultural / historic understanding, skills development and adventure. The range of these activities is not widely known or promoted and therefore is not top of mind for *potential* or *existing* visitors. Communications is limited to brochures distributed through the Visitor Centre, hotels and attractions or signage on area roads.

<b>Category</b>	<b>Activity</b>	<b>Approximate Price Range</b>
Relaxation	Fishing Parks and Trails Shopping Festival of the Islands Lansdowne Fair	Free – Full charter Free – \$10  \$18.00 \$6.00
Entertainment	Cruises Festivals / Events Golf Parks and Trails OLG Casino Shopping Circle H. Trail rides Thousand Islands Playhouse	\$8 - \$25 Free - \$20 \$40 - \$85 Free – \$5.90  \$30 \$32
Interpretation	Museums Historic sites Parks and Trails Landon Bay Centre	Donation - \$5 Free - \$5 Free - \$10 \$4
Education	Museums Tours Gananoque Horticultural Society Lansdowne Fair	Donation - \$5  \$5 \$6
Cultural / Historical Understanding	Museums Art Centres - performances Historic sites Farmers markets Antique shopping Studio / House and garden tours Gallery Vaga 1000 Islands Sky-deck Festival of the Islands 1000 Islands Cruise In Thousand Islands Art Association (Autumn Leaves Tour)	Donation - \$5 \$15-\$32 Free - \$5  Donation - \$2 Free \$3 - \$9 \$18.00 \$5 Free
Skills development	SCUBA Golf	\$25 -\$75 \$40 - \$85
Adventure	SCUBA Fishing Hunting Boating-Canoeing / Kayaking Parks and Trails	\$25 – \$75 Free – Full charter Guided packages Rental \$15 - \$189 \$4

Source: PRTD Industry Survey, 2006

Communities within 1000 Islands Gananoque do not animate public spaces to generate interest or excitement in places local residents and visitors congregate on an ongoing basis.

1000 Islands Gananoque offers a variety of cultural and entertainment experiences and feature well known performers and artists. They are available at a variety of price points throughout the calendar year.

<b>Events</b>	<b>Artists</b>
Gallery Vaga	Free
Studio Tours	Free
Arthur Child Heritage Museum	Donation - \$5
Rotary Craft Fair Summer	Free
Rotary Fall/Xmas Craft Fair	\$2.00
Lansdowne Fair	\$3.00
Rockport Winter Fair	
Seeley's Bay Frost Fest	\$3.50
Lyndhurst Turkey Fair	

Source: PRTD Industry Survey, 2006

In terms of dining options 1000 Islands Gananoque offers a selection of dining experiences. Of these restaurants few have name recognition outside the area, none feature well known accredited chefs and none offer wine lists with more than 25 labels.

<b><u>Restaurant</u></b>	<b><u>Approximate Entrée Price Range</u></b>
Hidden Valley Donut & Coffee Shop	5.50
Robeson's Country General Store	5.00
Grecos	14.95
Goodtyme Charley's	13.95
MacNeil's Landing	18.00
Paddys Pub	15.00
Anthony's	18.95
The Lobster Trap	18.00
Bravo	10.95
Boston Café	14.95
Modern Restaurant	13.00
Colonial Resort	15.00
Boathouse Country Inn Restaurant	15.00
Muskie Jakes	14.95
Golden Apple	18.00
Oscar's Restaurant	15.00
Rockport Boat Line	9.95
Smuggler's Run	16.00
Trinity House	22.00
Glen House Resort	21.00
Casa Bella	28.00
Athlone Inn	28.00
Gananoque Inn	34.00
Blinkbonnie	14.00

In terms of retail shopping experiences, 1000 Islands Gananoque has a variety of high-end to main stream retailers. Some are independently owned and offer a unique selection of merchandise. Some also have name recognition beyond the region.

<b>Store</b>	<b>Quality of Merchandise (Bargain, Average, or High)</b>
Perfect Place for Gifts	High End
1000 Islands Duty Free	Medium
Woodchuck Gallery	High End
Woodleys Jewellers	High End
Admiral II	High End
All About Books	Medium
Blue Mountain Archery	Medium
Islands Memories	Low End
This, That & Everything	Medium End
Island Beach Company	Medium End
River Myst	High End
The King's Building	High End
Gallery Vaga	High End

Source: PRTD Industry Survey, 2006

Those retailers who have name recognition outside the local area of region include:

Woodchuck Gallery Gallery Vaga
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Source: PRTD Industry Survey, 2006

## Satisfaction & Value

*This section documents the extent to which 1000 Islands Gananoque offers its guests a warm welcome, satisfies expectations, and offers value for money. The evaluation process has identified how guests and outside marketers view the region against these attributes. It also evaluates how 1000 Islands Gananoque is investing in improving performance in these areas.*

1000 Islands Gananoque Chamber of Commerce does not conduct an annual visitor survey. Although it does offer visitors an opportunity to sign a Guest Book located in the Visitor Centre this is not an adequate process to track guest experiences.

Through industry consultations it appears that providing acceptable and consistent levels of service and offering value for money may be an issue. Operators commented on the lack of consistent delivery of visitor services at some locations. Comments ranged in nature but most focused on the lack of commitment from owner operators to ensure visitors were treated in a warm and friendly manner and received a good experience. Some operators directed comments towards the disrepair and lack of attention to some of the tourism product within the destination. It was suggested some product and experiences needed to be upgraded.

One indicator to support the notion that service and product/experience deliverables are not acceptable is that visitation has decreased and key experience and service price points are staying the same or trending downwards (prices have not increased over 3 years and if so, increase is minimal). Therefore, one might conclude that guests are not receiving value for money and are not receiving acceptable levels of service and hospitality.

### Accessibility Rating

*This section assesses the ease of getting to and traveling within 1000 Islands Gananoque, the transportation modes that serve it and the importance of transportation to the tourist experience. The evaluation process has identified how accessible 1000 Islands Gananoque is and how well that accessibility is being managed.*

There are more than 6.3 million people living within a 3 hour radius of 1000 Islands Gananoque. Proximity to a major international air gateway, Pearson International Airport in Toronto, is less than 2.5 hours away. There is a regional airport 30 minutes from Gananoque; it is the Norman Rogers Airport in Kingston. Visitors can travel by air from Toronto to Kingston in 45 minutes.

Population Within a 3 Hour Radius	
Montreal QC (CMA 2006)	3,720,000
Cornwall ON (MA 2001)	57,581
Ottawa ON (CMA 2005 est)	1,146,790
includes Gatineau QC	
Kingston ON (MA 2001)	146,838
Belleville ON (MA 2004)	88,025
Cobourg ON (City 2001)	17,172
Port Hope ON (City 2001)	15,605
Peterborough ON (City 2004)	74,600
Oshawa ON (MA 2004)	296,298
Watertown NY (City 2000)	26,705
Syracuse NY (MA 2000)	732,117
<b>Total</b>	<b>6,321,731</b>

Source: Stats Canada, 2006

For visitors who travel to 1000 Islands Gananoque by automobile or motor coach the drive is pleasant and achievable with minimum effort. The commonly used routes are:

Montreal	40 and 401 west
Toronto	401 east
Ottawa	416 south and 401 west
USA	Ivy Lea International Bridge

There are a variety of modes of travel available to reach the destination. While most travel is done in personal vehicles the area is serviced well by regularly scheduled train (VIA Rail), and motor coach operators.

The destination is accessible by cruise ships and has docking facilities adequate to accommodate this mode of travel.

1000 Islands Gananoque does offer sufficient slips for transient boaters (140). Some are located within walking distance to visitor services and tourism experiences within the Town of Gananoque.

The Transportation Check List has been completed and 10 Yes's (six or less = non compliance) have been recorded which assumes the destination can safely say it has consulted with transportation resources and provides fundamental transportation services. *See Appendix 1*

### Accommodation Base

*This section assesses the breadth and depth of the 1000 Islands Gananoque offering in terms of the range of accommodation classes available, their location, and the presence of higher end operators. The evaluation characterizes the region's accommodation base.*

1000 Islands Gananoque offers visitors accommodation options with a total of 742 roofed guest rooms at a variety of price points and most are within close proximity (walking distance) of core attractors. The region has 309 campsites and 169 RV sites.

Class	# of Properties	# of Rooms/Sites	Price Range
RV / Camp Parks	6	478	\$18 - \$100
Bed & Breakfast	15	38	\$50 - \$200
Cottages/Cabins	14	80	\$50 - \$200
Resort Lodge/Inn	5	121	\$50 - \$200
Motel – Independent	7	144	NA
Hotel – Independent	3	149	\$50-200
Hotel - Chain	4	210	\$50 - \$200

Source: PRTD Operator Survey, 2006

The accommodation inventory includes “branded” well known chains\*. These include Best Western, Comfort Inn, Quality Inn and Holiday Inn Express.

# **PERFORMANCE**

## **Evaluation Rating for 1000 Islands Gananoque**

*The **Performance** measures identify the extent to which 1000 Islands Gananoque is successful and recognized in the marketplace. By comparing 1000 Islands Gananoque performance attributes in terms of hard data, conclusions can be determined as to its actual performance against its primary competitors and in a competitive marketplace context. Visitation statistics, accommodation occupancy levels, and critical acclaim are all industry standards to measure performance.*

*The quality of the tourist experience and the destination's success in providing it is validated by:*

- *Visitation*
- *Occupancy and Yield*
- *Critical Acclaim*

### **Visitation**

*This section assesses 1000 Islands Gananoque market performance in terms of visitation numbers and market share, attractiveness to different market segments, and times of year.*

***NOTE: The data listed below is from the 2004 CTS/ITS Survey and includes numbers for the United Counties of Leeds Grenville which includes but is not limited to 1000 Islands Gananoque.***

In 2004 the United Counties of Leeds Grenville attracted a total of 1,932,393 guests. Of these 690,332 (36%) stayed overnight and 1,242,062 (64%) were day visits.

Between 1998 and 2004, person visits decreased by 23%, from 2,507,778 to 1,932,393, visits by Canadians decreased by 36%, from 1,799,726 to 1,144,219 while visits by US residents increased by 17%, from 633,075 to 743,743. Person visits by residents of other countries decreased by 41% from 74,977 to 44,432.

Of the 690,332 overnight visitors, 431,257 (62%) were on pleasure trips, 191,044 (28%) were traveling to visit friends and relatives, 27,904 (4%) were on a business trip and 6% were travelling for unknown reasons.

Leeds Grenville attracted 383,787 (56%) of its overnight visitation from the Ontario market. The strongest Ontario markets for overnight visits were Ottawa Carlton (15%), Toronto (5%) and Frontenac (4%). The other Canadian provinces represented 32,663 (4%) of visits. The US market represented 244,179 (35%) of overnight visits. The strongest US markets were Pennsylvania and New York which each represented 12% of total overnight visits to Leeds Grenville. Visitors from other countries represent 29,702 (4%).

Overnight visitors spent 2,276,788 person nights in Leeds & Grenville United Counties, with 745,947 (33%) of these nights in roofed commercial lodgings such as hotels, motels, resorts, B&Bs and commercial cottages. 361,194 (16%) person nights were spent in local campgrounds or trailer facilities and 882,253 (39%) person nights were spent in private homes or private cottages.

Of the 745,947 person nights in roofed commercial lodgings, 29% were spent by residents of the province, 2% were spent by residents of other Canadian provinces and 69% were spent by international visitors (66% Americans; 3% other countries).

83% of the overnight visitors were travelling in adult-only parties and the remaining 17% were travelling with at least one individual fifteen years of age or younger. The average party size for overnight visitors was 2.0 (including children).

Visitation/Spending 2004	Ontario			Leeds and Grenville		
	Total	Same Day	Overnight	Total	Same Day	Overnight
<b>Total Person Visits (All Flows)</b>	118,284,236	71,612,018	46,672,218	1,932,393	1,242,062	690,332
<b>% Market Share</b>				1.6%	1.7%	1.5%
<b>Origin</b>						
Canada (Total)	94,843,493	57,347,560	37,495,933	1,144,219	727,769	416,450
USA (total)	21,391,369	13,957,359	7,434,010	743,743	499,564	244,179
Overseas (Total)	2,049,374	307,099	1,742,275	44,432	14,730	29,702
<b>Visitor Spending</b>						
Total Visits	\$17,080,681,498	\$4,474,312,938	\$12,606,368,560	188,744,895	\$55,296,466	133,448,429
% Share of Total Spending				1.1%	1.2%	1.1%
Visitor Spending by Canadians	\$10,356,111,584	\$3,273,125,717	\$7,082,985,867	\$76,472,913	\$19,861,008	\$56,611,905
Visitor Spending by Americans	\$4,383,216,921	\$1,058,425,868	\$3,324,791,053	\$102,434,903	\$34,703,956	\$67,730,947
Visitor Spending by Overseas	\$2,341,352,992	\$142,761,353	\$2,198,591,639	\$9,837,079	\$731,502	\$9,105,577

Source: CTS/ITS Statistics 2004

The following chart compares pertinent visitor statistics of Leeds Grenville with other counties within close proximity to 1000 Islands Gananoque;

Competitive Comparisons - 2004	Ontario	Leeds Grenville	Ottawa Carlton	Hastings County	Prince Edward County	Lanark County	Frontenac County
Total Person Visits (Weighted)	118,284,236	1,932,393	7,498,345	2,096,853	435,272	897,877	2,645,045
Length of Stay in Region							
Same-Day	71,612,018	1,242,062	3,965,982	1,229,769	201,503	551,611	1,461,471
Market share - Day visits		1.73%	5.54%	1.72%	0.28%	0.77%	2.04%

Overnight	46,672,218	690,332	3,532,363	867,084	233,769	346,266	1,183,574
Market share- Overnight		1.48%	6.40%	1.86%	0.50%	0.74%	2.54%
Market share – total visits		1.63%	5.90%	1.77%	0.37%	0.76%	2.24%
Spending							
Total Spending Assigned to Region for Visits in Region	17,080,681,498	188,744,895	1,171,838,677	158,968,392	36,203,533	55,481,301	335,848,552
Total Spending Assigned to Region for Same-Day Visits in Region	4,474,312,938	55,296,466	221,137,945	38,968,463	3,578,378	22,642,566	78,910,147
Average Spending Per Person Per Night	84.45	62.96	66.22	49.61	52.92	33.47	68.86
Average Spending Per Person Per Same-Day Visit	62.56	44.52	55.76	31.69	17.76	41.05	53.99
Total Spending Assigned to Region for Visits in Region & Residents Leaving Region	21,378,861,672	230,624,777	1,766,488,960	215,343,010	64,788,957	80,382,880	404,552,944
Market share - total spending		1.60%	6.30%	1.80%	0.40%	0.80%	2.20%

Source: CTS/ITS Statistics 2004

## Occupancy & Yield

*This section assesses 1000 Islands Gananoque market performance in terms of accommodation occupancy and guest expenditure levels. The evaluation compared occupancy and expenditure performance against industry and provincial averages.*

1000 Islands Gananoque commercial accommodation occupancy in 2005 was 64.7% equalling the provincial average of 65%. The average daily rate was \$88.41, REV PAR was \$57.20.

Source: PKF, 2005

In 2004, total spending by guests on day trips to Leeds Grenville was \$55,296,466. Total spending by all tourists on day trips in Ontario was \$4,474,312,938; the destination's share of total spending by these tourists was 1.2%. Guests on overnight trips spent \$133,448,429, total spending by all tourists on overnight trips in Ontario was \$12,606,368,560, and the destination's share of total spending by these tourists was 1.1%.

The average per person per night spending for overnight visitors to Leeds & Grenville United Counties was \$63 compared to \$270.27 average for Ontario. Overnight visitors from Ontario spent approximately \$51 per person per night in the area; those from USA spent about \$70 per person per night; and those from other countries spent approximately \$83 per person per night. The average expenditure for guests on day trips was \$44.52 compared to \$62.56 average for Ontario.

Visitation to the destination is similar to most in Ontario with peak travel taking place in the 2<sup>nd</sup> and 3<sup>rd</sup> quarters.

<b>QTR. 1</b>	<b>QTR. 2</b>	<b>QTR. 3</b>	<b>QTR. 4</b>
15%	30%	32%	23%

Source: 2004 CTS / ITS, Statistics Canada

### **Critical Acclaim**

*This section addresses the extent to which 1000 Islands Gananoque is recognized as a must-see destination, has a profile that contributes to the attractiveness of Ontario and Canada as a destination, and is a “top-ranked” place to visit. The evaluation identifies if 1000 Islands Gananoque is recognized as standing out from its competitors.*

1000 Islands Gananoque could be considered a “must see / must do” destination. Activities such as boat cruises, attending a live theatre performance, diving and angling are very attractive to those who seek out these activities and could be considered “must see / must do”.

The destination has a few experiences that have been ranked as “Number 1,” “Best in Class” or “top tier.” The St. Lawrence National Park has been identified as a unique and best in class experience along with the Thousand Islands Playhouse. Images of 1000 Islands Gananoque are used in OTMP and CTC advertising from time to time.

## **FUTURITY**

### **Evaluation Rating for 1000 Islands Gananoque ○**

***Futurity** identifies the extent to which 1000 Islands Gananoque is investing in its future as a place with viable and continuing attractiveness to evolving markets. It includes the activities in place to raise awareness for the destination as well as the degree in which new investment in the form of capital dollars will be made to enhance its product offering. It also determines its capacity in a number of physical measures such as infrastructure.*

*The ability for a destination to thrive from tourism into the future is sustained by:*

- *Destination Marketing*
- *Product Renewal*
- *Managing within Carrying Capacities*

### **Destination Marketing**

*This section identifies to what extent 1000 Islands Gananoque targets viable markets, invests in managing and promoting its tourism marketplace, and consults with the travel trade serving the region. The evaluation identifies if 1000 Islands Gananoque is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.*

There is a market demand for the 1000 Islands Gananoque type of offering. This demand is demonstrated in the March 2006 Travel Attitude and Motivation study:

<b>Activity</b>	<b>Percentage of travelers for whom this activity motivated some of their trips</b>
Gaming	34%
All Water-Based Activities	33%
All Performing Arts	17%
All Festivals and Events	16%
All Shopping	16%
Visiting National, Provincial Parks	11%
Fresh Water Fishing	10%
Live Theatre	5%
Museums, General History or heritage	4%

\*TAMS 2006, Travel Attitude and Motivation Study, Ontario Ministry of Tourism

1000 Islands Gananoque Chamber of Commerce is the recognized DMO for the area. They perform a number of activities that are associated with a DMO in spite the fact that they are a Chamber of Commerce. This has created confusion as to the primary role for the DMO and also put pressure on both the human and financial resources of the DMO.

The Chamber does not have sufficient funding to effectively target potential markets and market the respected destination. Communications represents 31% of 1000 Islands Gananoque Chamber of Commerce's \$164,230, 2006 operating budget. The Chamber does not have an annual marketing plan and does not track the effectiveness of its marketing efforts.

While customer service training is viewed as important, little or no area-wide initiatives are in place. Individual businesses conduct tourism hospitality or service training but there is a gap in delivering consistent quality training to front line hospitality workers.

## **Product Renewal**

*This section identifies the extent to which 1000 Islands Gananoque is making capital investments in its attractiveness into the future. The evaluation documents the status and magnitude of 1000 Islands Gananoque investment in the future.*

In the past five years \$21 million has been invested in facility renewal and / or expansion and development with an emphasis on products that are directly or indirectly associated with tourism. 80% of this investment has occurred in the last two years.

## **Managing Within Carrying Capacities**

*This section assesses the extent to which 1000 Islands Gananoque is aware of, and manages within, its capacity thresholds specifically its local economy, ecosystems and soft services infrastructure, its guest's satisfaction levels, hard services infrastructure, and its administrative systems. The evaluation documents 1000 Islands Gananoque ability to manage the system that sustains it.*

Tourist visits to 1000 Islands Gananoque make a net positive contribution to the local economy. The \$188,744,895 in spending by all visitors to Leeds and Grenville generated over \$131,929,000 in direct, indirect and induced contributions to gross domestic product (GDP), \$67,999,000 of labour income and salaries and, 2,449 part-time, full-time and seasonal jobs. Total taxes generated as a result of visitor spending in Leeds and Grenville reached \$81,055,000 including \$4,083,000 in municipal taxes.

Source: CTS / ITS, Statistics Canada, 2004

Areas of the destination, specifically the Township, are rural and the economic impact from tourism is primarily centred where the bulk of the tourism businesses are located, specifically in the town of Gananoque. However, the surrounding area offers visitors natural landscapes that present many outdoor activities including hiking, cycling, canoeing, hunting, birding, camping, and golf. The charming rural towns offer heritage experiences and annual festivals & events. The areas outside the Town of Gananoque recognize economic benefit as a result of these products and experiences.

In some destinations growing tourism visitation impacts the local resident's cost of living; this is not the case in 1000 Islands Gananoque. To date housing costs have not risen due to a growing tourism market, however a growing number of individuals are moving to the area to retire and this is having an impact on housing costs.

Increased visitation is not threatening the visitor experience, so overcrowding and overuse are not being cited as reasons not visit 1000 Islands Gananoque. Traffic congestion and parking may be an issue during peak travel times.

It appears some labour issues exist in 1000 Islands Gananoque. Semi-skilled labour is not readily available to work in the tourism industry. Students take many of the seasonal tourism jobs therefore once school is back in session some businesses have difficulty properly staffing their operations in the early fall. This presents a problem when the desire is to expand business opportunities into the shoulder seasons (spring and fall).

Managing the carrying capacities of the natural systems that sustain local ecosystems and quality of life within 1000 Islands Gananoque are well understood and monitored, this is described in:

- Frontenac Arch Biosphere Business Plan 2005 – 2008
- St Lawrence Islands National Park Ecosystem Monitoring Programme
- SOS Website ([www.saveontarioshipwrecks.on.ca](http://www.saveontarioshipwrecks.on.ca))
- Leeds, Grenville and Lanark District Health Unit (web site)

It appears the destination understands its futurity specifically related to water treatment and delivery capacity, sewage treatment and trunk capacity:

- United Counties of Leeds and Grenville Groundwater Management Study June 2001, Application of Results and Future Direction

Source: [http://www.ene.gov.on.ca/envision/water/groundwater/leeds\\_grenville/index.htm](http://www.ene.gov.on.ca/envision/water/groundwater/leeds_grenville/index.htm) and related links

In terms of road, transit, parking and trail capacity and the environmental effects of infrastructure expansion some issues do exist. These are having negative effects on the environment. These include:

Area	Impact
St Lawrence Islands National Park	Widespread / ongoing ecological impacts
Charleston Lake	Species at risk
Beaches	Variety during peak periods

PRTD Industry Survey, 2006

Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented; this is demonstrated in the following reports:

- St Lawrence Park Ecosystem Management Goals
- Cataraqui Region Conservation Authority Strategic Plan
- Charleston Lake Plan
- Thousand Islands Parkway Study Final Report

## **SUMMARY OF FINDINGS**

At the outset of the report a measurement criteria was described that rates the destinations status related to its performance for its product, performance and futurity dimensions. After completing the Destination Performance Summary using the data provided through industry surveys and supplementary information it has been determined that the destination is lacking in a number of fundamental areas.

**Product** - A Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:

- Distinctive Core Attractions
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- An Accommodations Base

● Almost - the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation

**Performance** - The quality of the tourist experience and the destination's success in providing it is validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim

● Almost - the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation

**Futurity** - The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

○ *No, the affirmation cannot be made or supported for the destination*

While positive affirmations cannot be made for 1000 Islands Gananoque for all three measurement criteria, for Product and Performance however the destination should be encouraged that it is on its way to being able to positively affirm those dimensions. The destination has potential to improve. Both 1000 Islands Gananoque Chamber of Commerce and the tourism industry stakeholders should be encouraged that the PRTD work has been completed and it has revealed gaps in the tourism offering but it also offers clear direction for improvement. It supports a premise that 1000 Islands Gananoque has the opportunity to once again develop and emerge as a viable destination in the very near future.

## **OBSERVATIONS**

- The work completed to date indicates that a formal tourism development strategic plan must be initiated that determines future priorities for the destination.
  - Supporting tourism infrastructure like the accommodations are some of the most desirable in the 1000 Islands corridor, yet most tourism products and experiences are underdeveloped and/or underperforming.
  - The casino has potential to attract higher visitation especially in the shoulder season in conjunction with visitation to “other experiences” such as an outdoor experience or a performance at the playhouse for example.
  - The destination has a long standing product offering tied to a St. Lawrence River experience, however other than the casino 1000 Islands Gananoque offers no “new reasons to visit”.
  - The destination has already completed preliminary studies with a focus on product development. Attention has been directed at the downtown (Downtown Revitalization Proposal) and at the waterfront (Lowertown Study) in Gananoque. This work should be considered as part of any future development.

A long term tourism development strategic plan would focus product development on areas that build on the reputation of the destination, yet provide new experiences for visitors to enjoy.

- The destination must clarify the role of the Chamber and determine “who does what” as it relates to destination marketing, visitor services and destination development. The destination needs to formally recognize the Chamber as a DMO and establish a clear “tourism” mandate for this organization. This may translate into the creation of a new organization or some transition of the existing organization. Immediate work is needed on this and it should be a part of the tourism development strategic plan.
- Although the Chamber has taken a lead in tourism marketing and servicing the visitor while in the destination they are not adequately funded to impact travel to the destination in any significant way.
  - The destination does not have the needed resources to properly develop and then promote the destination in order to positively impact tourism receipts to the area and the individual tourism businesses within 1000 Islands Gananoque
- Attractors must be clearly understood in terms of how they match what visitors are looking for, “*you have what they want*”. As an example, the 2006 TAMS Study\* reveals that both Canadian and U.S. visitors desire to better themselves through learning while visiting a destination and the areas heritage experiences, especially those found in the Township meets aspects of those who desire a learning vacation.

- Attention must be directed to further develop attractors as overnight, year-round experiences; all have the potential to do this if seasonal closings are addressed and attractors are presented as a cluster of experiences and activities ideally combined with accommodations.
  - Attractors clearly have potential to position and differentiate the destination, for example the St. Lawrence River experiences connected to the positioning of Gananoque as the “Gateway to the 1000 Islands” has significant potential to differentiate it from other destinations on the St. Lawrence River.
- Day and overnight trip expenditures are well below the provincial average therefore steps must be taken to extend the length of stay of both of these important visitor market segments. This can be accomplished by:
    - Extending length of stay in the destination
    - Leveraging the significant number of trips that originate as a result of the visiting friends and relatives (VFR) market segment
    - Ensure visitors have the information they need, when they need it to plan their trip or when they are en-route. For example, the Ontario Visitor Centres on Highway 401 at the Quebec border and at Hill Island are not open year-round, therefore the likelihood of someone stopping in 1000 Islands Gananoque while travelling west from Montreal or from New York State are slim because they won’t know what is available to them.
  - It is unknown if the destination delivers good service and value for money
    - A visitor survey needs to be implemented to capture guest experiences and perception of the destination
  - An opportunity exists to upgrade the service offering and experience delivery of the destination by initiating consistent training for all front line staff and “market readiness” training for tourism operators
    - This begins by establishing a standard of service excellence among the owners and operators of the tourism businesses within 1000 Islands Gananoque
  - Importance of tourism is not widely understood and fully leveraged
    - The town and township mention tourism in their annual plans but it is not clear if they are committed to tourism development in the area

## **RECOMMENDATIONS**

Based on the findings and noted observations the following recommendations have been developed in consultation with the 1000 Islands Gananoque Chamber of Commerce and tourism stakeholders within 1000 Islands Gananoque. Immediate, mid-term and long term action steps have been identified.

### **Immediate**

- 1000 Islands Gananoque Chamber of Commerce takes responsibility for ensuring the recommendations contained in the PRTD Report are initiated
  - This group should recommend a formal process to undertake the recommendations and determine who does what
  
- Implement a Tourism Destination Development Plan for 1000 Islands Gananoque, it becomes the road map for any future tourism development
  - This strategic plan incorporates and becomes the framework for the recommendations identified in the PRTD report
  - Priority must be given to reviewing existing proposals and plans related to Downtown Revitalization, Lowertown Development and the Clayton Antique Boat Museum in order to determine if the recommendations in these reports have merit on future tourism development plans within the Town of Gananoque
  - Use the plan to rally the industry with one focused approach to destination development
  - Use the plan to define the scope, prioritize the deliverables, secure funding and human resources to see the destination move forward in both the short and long term- initiate in fall 2007
  
- Transition the 1000 Islands Chamber of Commerce into a recognized Destination Marketing Organization by redefining the role and responsibilities of the organization
  - The destination warrants a dedicated tourism marketing organization, currently the Chamber is not functioning solely as a DMO and therefore their mandate and accountability is unclear
  - Retool the current organization as necessary to deliver on a redefined tourism industry led mandate
  - Determine who is responsible for on-going product development, this may be a role for both the new DMO, the Town of Gananoque and the Township of Leeds and The Thousand Islands
  - Staff the DMO accordingly based on future priorities and direction
  
- Grow tourism development & marketing budgets through the introduction of a volunteer destination development / marketing fee by January 2008

- Create a private sector led Tourism Development Alliance to lead this initiative
- It is understood work is already underway on this initiative, it is recommended those involved take whatever steps necessary to be inclusive in the planning and implementation of this activity with all appropriate private sector partners
- Many destinations, both large and small have successfully implemented such funding mechanisms, including Toronto and St Catharine's, and the success has come as a result of establishing levels of trust among industry leaders and having clearly defined guidelines related to participation in the fund and where funds are to be directed
- Introduce an annual visitor survey to track visitor experiences
  - Empower Chamber's, BIA's, tourism operators to deliver – 2 weekends per quarter and then communicate the findings to the industry
  - Initiate in Fall 2007

### Mid Term – April 2008

- Understand future travel motivations / behaviours using TAMS\* & match these to area attractors and focus development and promotion on the key attributes of these attractors:
  - 1000 Islands & St. Lawrence River Experience
    - Motor boating 3,614,404
    - Scuba diving in lakes / rivers 157,993
    - Swimming in lakes 7,031,678
    - Museums - general history or heritage museums 4,672,996
    - Festivals & Events 9,038,556
  - Natural Countryside & Rural Towns
    - Canadians who went Fishing 4,227,732
    - U.S. individuals who went Fishing 25,330
    - Kayaking or canoeing 2,334,205
    - Ice fishing 1,084,909
    - Golfing - played an occasional game 3,220,747
    - Hiking- same day excursion while on overnight trip 4,798,694
  - Thousand Islands Playhouse
    - Canadians who went to Live theatre 3,379,641
    - U.S. individuals who went to Live theatre 23,011
  - OLG Casino Thousand Islands
    - Canadians who went to casino(s) 5,218,740
    - U.S. individuals who went to casino(s) 60,594

\*All numbers Canadian visitors unless stated, TAMS, 2006

  - These are product experiences that customers are looking for
  - Identify product matches that are under developed / underperforming and focus on developing these experiences – they are the core attractors

- Upgrade and enhance experience delivery in the destination by initiating “market readiness” training for tourism operators
  - Implement *Tourism Inc.* workshops offered by the Ministry of Tourism in January 2008

### **Long Term – October 2008**

- Identify tactics to extend length of stay
  - Facilitate industry partnership through education
  - Create opportunities for dialogue between industry partners
  - *Open For Business* – improve hours of operation daily and seasonally
  - Bundle experiences: develop itineraries, package, take to market...experiences must have an overnight component
  - Always identify new “*reasons to visit*”
  
- Increase awareness levels of the importance of tourism to 1000 Islands Gananoque
  - Initiate a campaign targeting business leaders, influencers, residents, government officials
  - Use the Ministry’s (Industry Development Office) “*Making the Case for Tourism*” tool kit to get the facts about tourism impacts to the area and develop a comprehensive document and supporting presentation to use in both formal deputations and informal conversations
  - Empower the industry to be advocates for tourism, give them the presentation and equip them with the facts
  - Establish a resident based “Ambassador Programme” designed to inform residents of the value of tourism to their region, to equip them to be tourism ambassadors and to encouraged them to invite friends and relatives to visit

## **CONCLUSION**

Tourism has tremendous potential to enhance job and wealth creation within local municipalities while contributing to the quality of life for all residents. The implementation of the recommendations in partnership with local municipal efforts supports building and diversifying jobs and economic growth. The Premier Ranked Tourist Destination project provides a database of critical baseline data that paints a clear picture of 1000 Islands Gananoque strengths and weaknesses and provides direction to pursue improved tourism industry success and augment Local Municipal tourism efforts. The process involved several critical steps along the way and a serious commitment and investment of time by the industry partners involved, for this we are grateful. The result in part is an expanded network of area stakeholders who have a more cohesive focus on solving ongoing and future tourism challenges.

# Appendix 1

## Transportation Resources Checklist Attribute

		Yes	No
1.	a. The destination has at least one easily accessed Visitor Information Centre,	X	<input type="checkbox"/>
	b. on a major transportation route.	X	<input type="checkbox"/>
	c. with clear and frequent directional signage	X	<input type="checkbox"/>
2.	a. Major tourist transportation routes to downtown(s) have frequent directional signage,	X	<input type="checkbox"/>
	b. well-maintained road surfaces,	X	<input type="checkbox"/>
	c. and attractively maintained public spaces.	X	<input type="checkbox"/>
3.	a. Transportation routes to major attractions have frequent directional signage,	X	<input type="checkbox"/>
	b. well-maintained road surfaces,	X	<input type="checkbox"/>
	c. and attractively maintained public spaces.	X	<input type="checkbox"/>
4.	Shuttle services or taxis and Tourist orientation information are available at transportation terminals	<input type="checkbox"/>	X
5.	Tourist traffic congestion and way-finding problems are addressed by transit-based interventions, e.g., municipal transit, shuttle services, People Movers, satellite parking.	<input type="checkbox"/>	X
6.	Transit services to core attractions have schedules that accord with attractions' hours of operation.		X
7.	a. Taxi drivers have been given service delivery training,	<input type="checkbox"/>	X
	b. and briefing on tourist attraction locations.	<input type="checkbox"/>	X
8.	All attractions serving the coach tour market have sufficient on-site bus parking, Or there is convenient access to a bus parking/staging area.	<input type="checkbox"/>	X