Phase 5
Final Tourism Strategy

Niagara-on-the-Lake Tourism Strategy, Masterplan, and Action Plan (2024-2028)

Town of Niagara-on-the-Lake
1593 Four Mile Creek Road, PO Box 100
Virgil, Ontario, L0S 1T0
CBRE File No. 22-APPRHOTELS-0090

CBRE

January 31, 2024

Town of Niagara-on-the-Lake
1593 Four Mile Creek Road, PO Box 100,
Virgil, Ontario, L0S 1T0

RE: Niagara-on-the-Lake Tourism Strategy, Masterplan, and Action Plan (2024-2028), Phase 5 – Final Tourism, Strategy, Masterplan, and Action Plan

Dear Lord Mayor and Council,

In accordance with the terms of our engagement, CBRE Tourism Consulting ("CBRE") is pleased to submit the attached unformatted Final Tourism Strategy, Masterplan, and Action Plan on behalf of the Town of Niagara-on-the-Lake ("NOTL"). The CBRE Team is currently working on a high-quality, formatted publication of the Tourism Strategy, which will be presented under separate cover.

It has been a pleasure working with the Tourism Strategy Committee and Town Staff on this project and we wish much success to the Town in fulfilling your inspiring Vision for the tourism sector in Niagara-on-the-Lake.

Respectfully submitted,

Rebecca Godfrey, CMC, MBA
Senior Vice President, Tourism Consulting
Valuation & Advisory Services
Phone: 647 943 3743
Email: rebecca.godfrey@cbre.com

Contents

Acknowledgements

The Niagara-on-the-Lake ("NOTL") Tourism Strategy, Masterplan and Action Plan is the culmination of a strategic process that included research and analysis, public engagement, and plan development. It was created by the CBRE Project Team with the support of Town of NOTL staff, and the NOTL Tourism Strategy Committee, which is made up of industry leaders, operators, and stakeholders.

CBRE Project Team

— **Rebecca Godfrey** – Senior Vice President, CBRE Tourism Consulting (Project Lead)

— **Monica Pagtalunan** – Research Consultant, CBRE Tourism Consulting

— **Dan Hollingsworth** – Principal, N1 Strategy

— **Jennifer King-Callon** – Managing Director, N1 Strategy

— **Tracy John** – Principal, Amplify Marketing & Communications Canada

Town of NOTL Staff

— **Bruce Zvaniga** – Interim Chief Administrative Officer, Town of NOTL

— **Shannon Mista** – Legislative and Committee Coordinator, Town of NOTL

NOTL Tourism Strategy Committee

— **Andrew Niven, Committee Chair –** Director of Marketing & Hospitality, Konzelmann Estate Winery

— **Robin Garrett, Committee Vice-Chair** – Independent Consultant

— **Councillor Wendy Cheropita** – Councillor, Town of NOTL

— **Vladimir Haltigin** – Ambassador, Town of NOTL

— **Tim Jennings** – Executive Director, Shaw Festival

— **Erica Lepp** – Owner, Rentals Niagara

— **Councillor Maria Mavridis** – Councillor, Town of NOTL

— **Richard Mell** – Real Estate Agent, Sotheby's International Realty / Co-Owner, Grape Escape Wine Tours Inc.

— **Mark Torrance** – Vice President Estate Wineries, Andrew Peller Limited

— **Minerva Ward** – President & CEO of Niagara-on-The-Lake Chamber of Commerce & Tourism Niagara-on-the-Lake

Introduction

The Town of Niagara-on-the-Lake ("NOTL") retained CBRE Tourism Consulting, in association with N1 Strategy Inc. and Amplify Marketing & Communications Canada (the "CBRE Team"), in December 2022 to develop a comprehensive five-year Tourism Strategy, Masterplan and Action Plan. The CBRE Team has undertaken an interactive strategic planning process with the Town and its partners to move forward with S.M.A.R.T. objectives in the short-term (year 1), mid-term (2-3 years), and long-term (years 4-5 and beyond), based on strong consultation and data analysis.

This process has involved five phases, organized as follows:

— Phase 1: Environmental Scan and Destination Analysis

— Phase 2: Economic Impact Assessment

— Phase 3: Vision and Focus

— Phase 4: Strategies and Action Plan

— Phase 5: Final NOTL Tourism Strategy, Masterplan, and Action Plan and Presentations

Phases 1 to 4 have been completed and the Team is currently completing Phase 5 of the project work, which involves finalizing the Tourism Strategy, Masterplan and Action Plan for NOTL and creating a high-quality, formatted publication.

In preparing the subject Phase 5 Final Strategy, Masterplan and Action Plan Report in its current unformatted version, the CBRE Team has undertaken the following steps:

— Finalized Indicators of Success and Strategic Actions to guide NOTL's efforts in Governance and Destination Management, Product and Experience Development, Visitor Infrastructure and Investment Attraction, and Destination Marketing.

— Created a full Action Plan with partners, priority level, timeframe and budget (where applicable) for each strategic action item.

— Met with the Tourism Strategy Committee to review the Draft Final Tourism Strategy and Draft Action Plan.

— Incorporated mutually agreeable changes into the subject Final NOTL Tourism Strategy, Masterplan, and Action Plan.

Niagara-on-the-Lake's Tourism Positioning

The Town of Niagara-on-the-Lake is a well-known Canadian tourist destination, located in Southern Ontario. The town has become a popular leisure destination, offering a range of accommodations, culinary assets, wineries, breweries distilleries and cideries, agri-tourism experiences, arts and culture (notably the Shaw Festival theatre), golf courses, greenspace, gardens, cycling trails, and retail (including the Outlet Collection at Niagara—Canada's largest open-air outlet shopping mall). Niagara-on-the-Lake was an important site during early Canadian history and is home to several historic sites, including the Fort George National Historic Site, Brock's Monument, Laura Secord Homestead, Mackenzie Printery & Newspaper Museum, as well as period-restored heritage homes, and the Niagara-on-the-Lake Museum.

The Town is made up of five neighbourhoods: Old Town, Virgil, Glendale, St. Davids, and Queenston, as well as rural areas, and is accessible by road, air, and the nearby GO Transit rail stations in Niagara Falls and St. Catharines. In addition to being directly connected to major highways into the United States and across Canada, the Niagara District Airport is located at the western end of NOTL.

Of over 3,400 businesses in Niagara-on-the-Lake, approximately 22% of all establishments were related to tourism. The CBRE team undertook an in-depth analysis of Niagara-on-the-Lake's tourism products (assets) by type. This tourism asset inventory gives an indication of the experiences that tourists seek out when they visit the Town and informs the Town's strategy for future product and experience development and attraction within its tourism industry. Of note, the majority of accommodations, arts and culture, and retail assets are located within Old Town. Wineries and Cideries are spread throughout the region, with the majority along major throughways such as Lakeshore Road or Highway 55.

NOTL Tourism Assets			
Asset Category	**Count**	**Asset Category**	**Count**
Airport	**1**	**Heritage**	**8**
Accommodations	**362**	**Nature & Outdoors**	**14**
Hotel	8	Conservation Area	2
Inn	11	Garden	1
B&B/Vacation Rental	342	Park	3
RV/Cottage Rental	1	Trail	8
Agri-Tourism	**14**	**Retail**	**121**
Farmers' Market	5	Food/Confectionary	15
Lavender Farm	1	Beauty/Wellness	21
Orchard	8	Clothing/Accessories	53
Attraction/Experience	**3**	Antiques/Art	13
Arts & Culture	**16**	Gifts/Souvenirs	10
Art Gallery	10	Floral	8
Art Museum	1	Outlet Mall	1
Theatre	2	**Sports & Recreation**	**7**
Visual Arts	3	Golf	5
Brewery/Distillery	**10**	Arena	1
Brewery	4	Community Centre	1
Distillery	2	**Tour & Transportation**	**10**
Cidery	4	Tour Operator	9
Culinary / Restaurants	**70**	Transportation	1
Limited Service	33	**Waterfront**	**2**
Full Service	24	Jet Boat Tours	1
Bakery	5	Sailing Club	1
Pub/Bar&Grill	4	**Visitor Services**	**2**
Caterer	4	**Winery & Vineyard**	**40**
Total			**680**

Source: NOTL Business Counts 2022, Statistics Canada, 2023 ShopNOTL Directory

In recognition of tourism's importance to the economy, Tourism Niagara-on-the-Lake (Tourism NOTL) was elected as the Town's official destination marketing organization ("DMO") under a Fee-for-Service agreement with the Town. Tourism NOTL is a subsidiary of the NOTL Chamber of Commerce, which has been in existence for 70 years. The Town also approved a Municipal Accommodation Tax ("MAT") to be applied to accommodation establishments of 5 or more rooms, within the NOTL geographic region. The MAT funds generated are collected by the Town in a separate reserve and kept there until they are divided equally (after administration costs), between the Tourism NOTL and the Town of NOTL. The Town elected a Committee of Council in 2023 to determine the best utilization of the Town's portion of MAT revenues, which are currently held in reserve for future tourism initiatives, which include capital projects.

While the Town has set strategic direction and funding for tourism and is managing collection of Municipal Accommodation Tax ("MAT") revenues, local business development efforts are provided through the Chamber, and marketing and promotion for the Town are provided by the local DMO. Nevertheless, through the study process, it was determined that to manage sustainable growth of the tourism industry within Niagara-on-the-Lake, more distinct roles and responsibilities for governance and accountability between tourism industry stakeholders would be required.

During the process of our stakeholder engagement, certain themes and objectives rose to the top in defining a Vision for NOTL's visitor economy moving forward, including (but not limited to), the following:

— Preserving Small Town Community Culture

— Alleviating Visitor Pressure (Overcrowding) in Peak Season

— Wayfinding and Experience Corridor Development

— Creating Products & Experience Clusters

- Activating the Waterfront
- Elevating Off-Peak Activities (e.g., arts & culture, parks & trails, conferences, etc.)
- Improving Transportation and Access
- Finding Solutions for Parking
- Creating Better Visitor Infrastructure (public washrooms, VIC, etc.)
- Defining the Organizational Approach to Tourism
- Support for New Tourism Investment and Development
- Improving Communication / Collaboration between Businesses
- Converting Daytrippers to Overnight Guests
- Modernizing and Digitizing Visitor Information

Through the engagement the CBRE Team also identified certain priorities relative to tourism infrastructure investment in NOTL and the type of investor required. Many of these projects could be funded through newly acquired MAT revenues (e.g., the 50% allocated to the Town), acting as the driver for other new tourism investment.

Infrastructure Options	Investor Type
Parking structure	Public / Private / P3 Partnership
Old Town visitor infrastructure (public washrooms, water bottle refill stations, crosswalks)	Public
Waterfront infrastructure and activation (boardwalks, public piers, boat launch, drinking fountains, rentals, etc.)	Public / Private / P3 Partnership
Wayfinding / Signage (including Experience Corridors)	Public
Bike lanes & infrastructure	Public
Hop-on Hop-off Bus / Shuttle Service for employees and visitors throughout NOTL	Public / Private / P3 Partnership
Bus coach staging area in Old Town	Public
Public transportation from Glendale to Old Town	Public / P3 Partnership
Needs study for accommodations outside Old Town / Glendale	Public
Medical centre with emergency care	Public
Runway and terminal expansion at Niagara District Airport to increase capacity	Public / Private / P3 Partnerships
Needs study for developing pedestrian only section on Queen Street & associated infrastructure	Public

The Final Tourism Strategy, Masterplan, and Action Plan has considered feedback from a wide range of industry stakeholders to ensure effective implementation and buy-in from NOTL residents, government and the business community. The strategy builds on the "best of NOTL," leveraging opportunities to sustainably grow NOTL's visitor economy, while addressing existing challenges and mitigating threats from external forces.

Fundamentals of the Tourism Strategy

The Town of Niagara-on-the-Lake's Tourism Strategy is expected to set the course for the Town's tourism industry efforts, based on a robust strategic process. In determining how best to move forward with destination management and development, the Plan must be based on the following fundamental elements:

— The **Vision Statement** succinctly describes the desired future state of the entity in question, which in this case, is the Town of Niagara-on-the-Lake as a tourism destination. The Vision can also reveal the "where" of an entity - not just where it seeks to be, but where it wants the industry to be as a result. As such, the Vision Statement for this Strategy will be specifically dedicated to the Town's tourism potential.

— **Values** are the core beliefs that inspire or guide the entity's choices, which in this case is the Municipality's choices. Values guide how things should be done in pursuit of the Vision. The values need to be filtered through the community and respected by everyone involved in destination management and development.

— **Strategic Priorities** provide a structure for key outcomes and actions in the strategy, for instance, "Tourism Marketing" would have distinct outcomes and actions from "Governance."

— **Priority Objectives** refer to the overarching goal within each Priority, while **Indicators of Success** provide direction on the end-state for each Priority and are directly linked to the Vision.

— **Strategic Actions** offer a roadmap for achieving outcomes identified by the Indicators of Success under each Priority area.

Since this is not a Strategic Plan for a specific organization, but rather a Strategy for NOTL's tourism industry, the CBRE Team has determined that no Mission Statement is required. (NOTE: a Mission Statement is an action-oriented statement, declaring the purpose an organization serves to its audience.)

Vision Statement

> **Niagara-on-the-Lake is an extraordinary wine country destination, known for its natural beauty and unrivaled cultural experiences.**

Values

— Authenticity

— Collaboration and Communication (Engagement and Relationships)

— Community Pride and Responsibility (municipality, businesses, residents and visitors)

— Inclusivity

— Preservation and Regeneration (of heritage, beauty, infrastructure)

Overall Tourism Goal

To enhance sustainable growth of tourism businesses, overnight visitation and spending in NOTL.

Strategic Priorities

1. Governance and Destination Management
2. Product and Experience Development
3. Visitor Infrastructure and Investment Attraction
4. Destination Marketing

Indicators of Success

The following chart outlines Priority Objectives and Indicators of Success for each of the four Priority areas.

Priority	Priority Objective	Indicators of Success
Governance and Destination Management	— Develop a sustainable tourism ecosystem with clear organizational roles, responsibilities, and dedicated resources	— Leadership is established and capacity building enhanced within NOTL's tourism ecosystem. — A responsibility framework is formalized, and internal processes are established to maintain a sustainable tourism ecosystem in NOTL. — All municipal decisions are assessed through a tourism lens, including the Town's share of Municipal accommodation Tax (MAT) revenue investment moving forward. — Resources and supports are provided for tourism related businesses in NOTL, and in turn improve the guest experience. — The online visitor experience is streamlined. — Platform established for interactive communication between the municipality, businesses, and residents. — Regular collection and analysis of meaningful visitor data to support product development, investment attraction, visitor infrastructure development and marketing.
Product and Experience Development	— Adopt a strategy to enhance the Town's best assets, define the Experience Corridors, and capitalize on new	— A Product and Experience Development plan is identified and responsibilities assigned.

	developments to broaden NOTL's market base	— Existing tourism products are enhanced and categorized into Product Clusters, in alignment with the Tourism Vision for NOTL and its tourism partners.
		— NOTL's Experience Corridors are defined and established, and products are identified within each grouping.
		— Gap assessment criteria are created for the Experience Corridors to encourage new investment and development.
Visitor Infrastructure and Investment Attraction	— Approach economic and community development through a tourism lens	— Municipal roles and responsibilities for tourism investment attraction and visitor infrastructure are established.
		— Transportation solutions are identified to support businesses and visitors, including parking, intercommunity transit, and bike lanes.
		— An Experience Corridor Wayfinding strategy is initiated, including signage and relevant infrastructure initiatives.
Destination Marketing	— Adopt the Tourism Vision for NOTL as an outward-facing brand, leading with NOTL's best experiences	— Roles and responsibilities for marketing and promotion of the destination are allocated.
		— A visitor-facing brand is developed for the Town of NOTL as a destination, distinct from the civic brand identity.
		— Marketing campaigns showcase the best experiences in NOTL's wine country.
		— NOTL's Product Clusters and Experience Corridors continue to align with visitor needs and wants year-round.

Indicators of Success & Strategic Actions

The following section provides the specific actions designed to move the Town of NOTL forward towards its Tourism Vision. These actions have been organized under each of the four Strategic Priorities, as shown in Exhibit 1.

Exhibit 1: Town of NOTL Strategic Priorities for Tourism
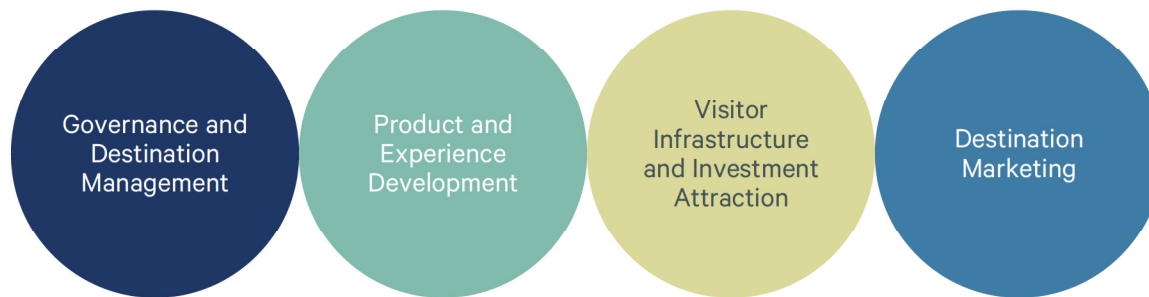
Governance and Destination Management

Product and Experience Development

Visitor Infrastructure and Investment Attraction

Destination Marketing

PRIORITY #1 - Governance and Destination Management

Priority Objective – Develop a sustainable tourism ecosystem with clear organizational roles, responsibilities and dedicated resources

Destination management is the coordinated and thoughtful planning of all elements that make up a tourism destination. It involves attracting visitors, supporting businesses, addressing resident concerns, working with appropriate partners, and generally making the business of tourism a sustainable initiative for the destination (including environmental, economic, social, infrastructure, and other relevant considerations). Strong governance needs to be in place to ensure a sustainable tourism ecosystem with all the afore-mentioned responsibilities addressed.

This means addressing the interactions between visitors, the industry that serves them, the community that hosts them, and the broader environment, to fulfill a collective destination vision. Although there is no "one-size-fits-all" solution for organizational structure, CBRE research demonstrates that organizations in positions of leadership for the tourism industry are expanding (or seeking to expand) beyond a traditional marketing and promotion focus to a broader mandate that includes destination development and management, and bridges the gap between economic development and tourism.

According to Destination International's *DestinationNEXT 2023 Futures Study*, organizations are both expanding their mandates and changing how they prioritize their mandates. The top 5 of 50 strategies for DMOs are as follows:

1) Protect revenue sources to maintain current funding levels

2) Focus on developing authentic experiences for the customer

3) Better integrate tourism and economic development

4) Build the destination brand around the community's goals, values and creative energy

5) Have a greater role in destination and product development

Greater industry, community and government alignment is driving destination competitiveness and brand awareness, and ensuring financial sustainability is a big piece of that equation.

NOTL's tourism industry supports about 3,350 jobs (59% of total base jobs in NOTL) and draws approximately 2.2 million visitors annually, meaning that tourism is a significant economic driver and core part of life for a community of less than 20,000 residents. With the importance of tourism to the Town of NOTL, the CBRE Team sees an opportunity for the Town to take a leadership role and build capacity within the tourism ecosystem.

Given that the Town has already recognized the need for and allocated funding to the creation of an Economic Development position, the CBRE Team recommends creating **a new Economic Development and Tourism Director position at the Town.** The main roles and responsibilities of this position would include traditional economic development, as well as managing the implementation of the new Tourism Strategy, working internally on processes within the municipality, taking advice from other senior staff, and managing tourism-related business relations and infrastructure initiatives, and work collaboratively with tourism partners (including Tourism NOTL). The Economic Development and Tourism Director should adopt a "concierge" approach to help tourism businesses navigate municipal processes (e.g., licensing and permitting, zoning, etc.), and would direct them to either the DMO for product or experience development and promotional needs. Furthermore, it will be important for the new Director to develop a results-based accountability framework to track the success and outcomes of the NOTL Tourism Strategy, and report on progress to the Tourism Strategy Committee and Town Council. From an organizational perspective, this role might fit best reporting directly to the Chief Administrative Officer (CAO), and ideally offers many of the services required by an Economic Development Officer focusing on Tourism, including more traditional economic development responsibilities, such as workforce attraction.

The Economic Development and Tourism Director position must be distinct from the President & CEO role at Tourism NOTL, whose role will continue to be focused on marketing, promotion, and product and experience development. It will be important to establish clear and consistent communication once roles are allocated.

It will also be important to secure sustainable sources of funding from the Town's portion of the MAT to support the Economic Development and Tourism Director role and related responsibilities (at least in Years 1-2 of strategy implementation), as well as visitor infrastructure projects.

It is pivotal to the success of this Strategy that the Economic Development and Tourism Director adopt a strong destination management role AND work in harmony with the President & CEO of Tourism NOTL (the Town's Destination Marketing Organization). The Town's Economic Development and Tourism Director will need to play a central role in advocacy for the visitor economy, highlighting business intelligence relative to tourism, and aligning government, community, and industry needs in order to attract new tourism investment.

Critical roles for the destination's tourism ecosystem and the recommended allocation of responsibility have been provided in Exhibit 2.

Exhibit 2: Recommended Roles and Responsibilities for NOTL's Tourism Ecosystem

Roles	Town of NOTL	Tourism NOTL (DMO)
Execution & Oversight of Tourism Strategy	X	
Community Relations	X	
Data Analysis, Tourism Research & Business Intelligence	X	X
Governance & Administration (with Tourism Strategy Committee)	X	
Government Relations	X	
Marketing & Promotion of NOTL		X
Product & Experience Development		X
Special Event Hosting (e.g., Peach Festival)		X
Tourism Branding		X
Tourism Business Support & Relations	X ("concierge" approach)	X
Tourism Investment Attraction	X	
Visitor Infrastructure (e.g., parking)	X	
Visitor Services (website, guidebooks, information booth, etc.)		X
Wayfinding and Signage	X	

To ensure accountability and clarity for tourism roles in balance with community needs, the Town should revise its Memorandum of Understanding (MOU) with Tourism NOTL, as identified in Exhibit 2.

Furthermore, members of industry should continue to support and represent NOTL's visitor economy, as provided by the NOTL Tourism Strategy Committee (TSC) throughout the strategic planning process. Thus, to demonstrate sound governance, ensure clear communication and support the Town and the DMO, it is recommended that existing **Tourism Strategy Committee remains active in an advisory role**.

Destination management is deeply rooted in the needs and wellbeing of the community and its environment. Ensuring residents, businesses and visitors are benefitting from initiatives underway in the greater visitor economy should be top of mind. To this extent, the Town's share of MAT funding must support infrastructure that will benefit visitors, businesses and residents. Ensuring residents and operator needs are being met will further support the economic and social benefits of the visitor economy.

CBRE is recommending the following overall goal for use of the Town's share of MAT revenue: **to ensure NOTL is a profitable and sustainable destination for visitors, businesses and residents**. To ensure all aspects of the subject Tourism Strategy can be met, it is recommended that the Town's share of MAT revenue is divided into two categories:

1) **NOTL Destination Management Fund**: To support development of a new Economic Development and Tourism Director to manage tourism at the Town level with associated resources, reporting to the CAO.

2) **NOTL Destination Development Fund**: To support for new and/or enhanced visitor and resident infrastructure, focusing on ways to capitalize on "wine country" and cultural experiences.

It will be important for the Town to measure the impacts of rolling out the subject NOTL Tourism Strategy to inform future decision-making and new investment, and to see if visitation has changed within the Town. Measuring success

and using data driven decision making supports the balanced growth of NOTL, for instance, it can help make better informed decisions regarding future investments in projects and opportunities. Furthermore, establishing and assessing a set of key indicators for tourism will enable NOTL to communicate results. One of these key indicators will be visitor data. Reporting on outcomes will also build public confidence in the Strategy and assist in communicating the activities completed by the Town and Tourism NOTL and demonstrate the importance of a balanced approach to tourism.

Governance and Destination Management - Indicators of Success and Strategic Actions

Indicators of Success	Strategic Actions
Leadership is established and capacity building enhanced within NOTL's tourism ecosystem	1. Create a dedicated **Economic Development and Tourism Director** to manage Tourism at the Town of NOTL, reporting to the CAO; whose role would be to ensure effective implementation of the subject NOTL Tourism Strategy, manage tourism-related infrastructure projects, community and government relations, and liaise with the Tourism Strategy Committee and Tourism NOTL.
	2. Establish the Tourism Strategy Committee as an ongoing Committee of Council to support the new Economic Development and Tourism Director and provide oversight of the Strategy's implementation
	3. Review and execute on recommended roles and responsibilities, and organize implementation of the subject NOTL Tourism Strategy
A responsibility framework is formalized and internal processes are established to maintain a sustainable tourism ecosystem in NOTL	4. Review Town of NOTL budget and determine appropriate allocation for new Economic Development and Tourism Director to manage Town tourism-related responsibilities (outlined in Exhibit 2).
	5. Revise Memorandum of Understanding (MOU) and accountability framework between the Town of NOTL, and Tourism NOTL to ensure sufficient resources are allocated to tourism-related roles and responsibilities, and that roles and responsibilities are clearly defined (as outlined in Exhibit 2).
	6. Provide updates to Council (quarterly at most) to reinforce the importance of tourism to NOTL's economy.
	7. Consider hosting an annual Town Hall in collaboration with the DMO to provide tourism updates.
	8. Implement system of regular checks on tourism roles and responsibilities for accountability purposes.
All municipal decisions are assessed through a tourism lens, including the Town's share of MAT revenue investment moving forward	9. Schedule regular meetings between the Town's Economic Development and Tourism Director and other Town departments to ensure tourism initiatives are communicated and needs of the tourism industry are being met.
	10. Develop an overall goal for use of the Town's share of MAT revenue: **to ensure NOTL is a profitable and sustainable destination for visitors, businesses and residents**.
	11. Develop two distinct funds to support NOTL's goal for use of the Town's share of MAT revenue: a. NOTL Destination Management Fund

Purpose: To support development of a new Economic Development & Tourism Director to manage tourism at the Town level with associated resources; reporting directly to the CAO.

b. NOTL Destination Development Fund

Purpose: To support for new and/or enhanced visitor and resident infrastructure, focusing on ways to capitalize on "wine country" and cultural experiences

12. Determine budget allocations for each category and adjust on an annual basis.

13. Select projects and infrastructure initiatives that promote and support tourism and economic development efforts that benefit both visitors and residents, through use of an Evaluation Matrix for Destination Development Fund allocation.

Resources and support are provided for tourism related businesses in NOTL, and in turn improve the guest experience	14. Create an information and awareness program to educate and inform tourism related businesses, tourism stakeholders, and residents on the economic benefits and impact of the visitor economy.

15. Collaborate with the NOTL Community & Development Services department to support the sustainability and expansion of tourism businesses, with a focus on their unique needs.

16. Develop a suite of information, data, and training resources to support tourism related businesses, including for example:

a. Visitor friendliness checklist

b. Data analysis (sector studies, Prizm segment descriptions)

c. Links to training programs and resources

d. Links to other supporting tourism organizations (RTO2, TIAO, Destination Ontario, Culinary Tourism Alliance, TIAC, Niagara Aspiring Global Geopark, etc.)

e. Funding programs

f. Calendar of major tourism events and festivals taking place in Niagara-on-the-Lake

17. Enhance the guest experience for visitors who are already coming to NOTL to ensure they stay longer and do more in the community

a. Encourage operators to direct guests to the DMO website for itineraries and accommodation ideas

b. Ensure visitors are provided with many touch points to obtain directions to other activities, transit, parking, etc.

c. Provide tools for businesses to cross-promote

18. Create a visitor-friendliness plan to help tourism businesses direct residents and visitors to notable assets and experiences within NOTL (e.g., drive visitors to different parts of the Experience Corridors)

	19. Make it easier for event organizers to manage costs and receive permits for celebrations, festivals, and events within the Town (e.g., at community parks)
The online visitor experience is streamlined	20. Identify and eliminate any tourism websites for NOTL experiences that are currently not functioning
	21. Isolate and develop the **Tourism NOTL website as the only visitor-facing website**
	22. Develop a webpage on the **Town's website for tourism-related businesses and potential investors to interact**, in collaboration with the Chamber of Commerce
Platform established for interactive communication between the municipality, businesses, and residents	23. Build an online platform to encourage and facilitate collaboration between tourism businesses on the Town's website
	24. Collaborate with Tourism NOTL to organize regular meetings (e.g., quarterly) with tourism businesses to learn about new initiatives and opportunities for future collaboration
	25. Introduce and provide regular updates to the public on NOTL Tourism Strategy implementation, focusing on the importance of sustainability for strategic success
Regular collection and analysis of meaningful visitor data to support product development, investment attraction, visitor infrastructure development and marketing	26. Develop a program to track visitation to NOTL through: a. macro 3rd-party data b. industry-generated data (segmented by festivals/events, major business events in hotels, sporting events)
	27. Work with partners to undertake annual visitor surveys to gain a qualitative understanding of visitors' perception of NOTL's tourism offerings
	28. Work with the Tourism Partnership of Niagara (TPN / RTO2) and Niagara Economic Development to undertake enhanced visitor research and analysis
	29. Collect and track tourism economic development statistics, in collaboration with external partners (like TPN), including: — New and enhanced investment into tourism assets and experiences, — The number of tourism-related businesses and the associated employment using the Tourism Asset Inventory, and — The economic impact of NOTL's visitor economy by measuring visitor spending, the attributable GDP portion, and infrastructure associated with new/enhanced investments.
	30. Contribute data regularly to the suite of information, data, and training resources to support tourism related businesses.
	31. Ensure public awareness of tourism strategy implementation success

PRIORITY #2 - Product and Experience Development

Priority Objective: Adopt a strategy to enhance the Town's best assets, define the Experience Corridors, and capitalize on new developments to broaden NOTL's market base.

Product development can be defined as the creation of new or enhanced and innovative products, experiences, and services for visitors to enjoy, but also as the act of connecting stakeholders with those products and experiences (both the business operators and the visitors or residents).

It was unanimously agreed that leading with the best assets NOTL has to offer, and both defining the Experience Corridors (ECs) and integrating new product development within the ECs was a high priority for Niagara-on-the-Lake as a way to establish and broaden a strong destination identity. CBRE recommends that the Town's Economic Development and Tourism Director take on the role of establishing the ECs and managing projects associated with building visitor infrastructure, while Tourism NOTL take on the responsibilities associated with development and marketing the different product clusters and building itineraries for the Experience Corridors.

The recommended Product and Experience Development Plan for NOTL is as follows:

1) Enhance what exists today and categorize those offerings into Product Clusters

A compelling tourism experience consists of the core product (attraction, activity, etc.), the service before, during, and after the visit, the story of the place or people that make the experience memorable, and the narration or unique way that story is delivered. Typically, it is the role of the DMO to connect the dots for visitors and create a compelling story, building on the product and destination's unique offerings.

In order to enhance what exists today, the natural starting point would be to create a Tourism Product & Experience Inventory. This requires categorizing assets by type, according to industry best practices and discussions with operators. Development of a Tourism Product & Experience Inventory, wherein assets can be clustered by activity type and used to develop itineraries for visitors, in a consistent manner would certainly help to position NOTL as a destination.

Once the inventory is developed, it will be possible to create clusters of experiences and packages for further marketing and promotion. There is a clear need for tourism product and experience clustering, first with existing businesses where capacity exists, and with new businesses in the longer term.

Potential Product Clusters include the following, each of which will need to be fully defined in terms of both the product offering and visitor appeal:

— Culture, heritage and theatre
— Wineries & related experiences
— Nature & outdoor activities (including gardens)
— Culinary experiences & restaurants
— Major festivals & events
— Breweries, distilleries & cideries
— Retail & shopping
— Recreation & sports
— Conferences & business events (including sustainable business event initiatives)
— Spas & wellness

2) Develop Experience Corridors and integrate products clusters

Throughout the stakeholder engagement, NOTL's **Experience Corridors** and their potential for dispersing visitors were frequently mentioned. These "Corridors" include assets located on and around the major road arteries through NOTL, including but not necessarily limited to:

— Niagara Stone Road (55)

— York Road (89) connecting Glendale to St. Davids and Queenston

— Niagara River Parkway

— Lakeshore Road (87)

— Queen Street / Historic Old Town

— Four Mile Creek Road (100)

As shown in the exhibit below, **the Experience Corridors are natural corridors that visitors already choose to travel on and spend time along, however there is currently limited bundling of activities within the corridors and a lack of supporting wayfinding infrastructure**. Ideally, these corridors are themed based on their unique attributes and the types of experiences available.

Exhibit 3: Potential Experience Corridors

There is no comprehensive wayfinding strategy that connects visitors to NOTL's many tourism assets and experiences. A wayfinding strategy that incorporates both hard assets (signage) and digital navigation (based on digital maps and directions) will be instrumental in assisting visitors to find their way and experience the many related tourism assets that are dispersed throughout NOTL and its ECs. The development of this wayfinding strategy has been included within Priority #3 – Visitor Infrastructure and Investment Attraction.

Once the ECs are established, it will be important to translate assets into itineraries. Destination itineraries are the outcome of combining a destination's tourism assets with the destination's visitor preferences. Itineraries allow the destination to suggest tourism assets that match a visitor's preferred activities, interests, and ways to experience a destination.

Itineraries do not need to capture all possible assets in a destination, but rather provide an opportunity to curate tourism assets into experiences, based on the types of visitors a destination receives. Examples of itineraries for NOTL include combining elements from multiple asset categories such as nature and outdoors, wineries, culinary, breweries and distilleries, history and heritage, culture, and wellness:

- York Road = Winery tour, culinary experience, and nature trail
- Queen Street = Historical tour, lunch in Old Town, Shaw Festival theatre show, and gardens

3) Attract new products and experiences for NOTL that fit within the Experience Corridors

In the longer-term, it is recommended that the Town undertake a gap analysis to determine what products and experiences would best serve **to grow the economy and bring more high-value visitors** (particularly those that stay longer and spend more in the community). Waterfront activities could be one area of focus, for example: an enhanced boardwalk experience, private boat launches, food trucks, waterfront dining, etc. to drive the summer visitor off of Historic Queen Street. Driving more high-quality retail and upscale accommodations would also be important.

Another core driver will be to develop new products/experiences that drive visitation during the off-season, such as attracting relevant meetings, conferences or incentive events.

There are some well-developed Indigenous Tourism and Black heritage products and experiences within the Town of NOTL, including the Landscape of Nations Memorial in Queenston Heights Park and the Voices of Freedom Park in Old Town, and NOTL played a critical role as a refuge for African Americans in conjunction with the Underground Railroad. Enhanced efforts to include and invite First Nations communities to work on tourism initiatives within the Experience Corridors are strongly recommended. Consideration should also be given towards identifying and supporting additional tourism experiences connected to Black history and heritage.

Product and Experience Development - Indicators of Success and Strategic Actions

Indicators of Success	Strategic Actions

A Product and Experience Development plan is identified, and responsibilities assigned	1. Define the Product and Experience Development Plan for NOTL:
	
	    a) Enhance what exists today and categorize those offerings into Product Clusters
	
	    b) Develop NOTL's Experience Corridors (ECs) and integrate products clusters
	
	    c) Attract new products and experiences for NOTL that fit within the Experience Corridors
	
	2. Allocate all responsibilities related to Experience Corridor and product cluster development, itinerary-building, and marketing ECs to **Tourism NOTL.**
	
	3. Allocate all roles related to tourism strategy implementation, tourism-related infrastructure project management, and investment attraction to the **Town of NOTL under the new Economic Development and Tourism Director**.

Existing tourism products and enhanced and categorized into Product Clusters, in alignment with the Tourism Vision for NOTL and its tourism partners	4. Utilize the asset inventory created by CBRE to establish NOTL's Tourism Product Cluster Inventory
	5. Develop **NOTL's Product Clusters and define the product offering and visitor appeal within each Cluster:**

    a) Arts, culture and theatre

    b) Agri-tourism

    c) Heritage & historic experiences

    d) Wineries & related experiences

    e) Nature & outdoor activities (including gardens)

    f) Culinary experiences & restaurants

    g) Major festivals & events

    h) Breweries, distilleries & cideries

    i) Retail & shopping

    j) Recreation & sports

    k) Conferences & business events (including sustainable business event initiatives)

    l) Spas & wellness

6. Create itineraries that build upon the draw of NOTL's "Wine country" experiences to increase length of stay

7. Create digital tours (e.g., downloadable walking tours, maps, etc.).

NOTL's Experience Corridors are defined and established, and products are identified within each grouping	8. Identify main travel routes through NOTL and define boundaries and theming for each of the six (6) **NOTL ECs**, including but not necessarily limited to:

    a) Niagara Stone Road (55)

    b) York Road (89) connecting Glendale to St. Davids and Queenston

    c) Niagara River Parkway

    d) Lakeshore Road (87)

    e) Queen Street / Historic Old Town

    f) Four Mile Creek Road (100)

9. Initiate a wayfinding strategy that incorporates both hard assets (signage) and digital navigation (based on digital maps and directions) for each of the ECs.

Gap assessment criteria are created for the Experience Corridors to encourage new investment and development	10. Create assessment criteria to help guide new investment within NOTL's ECs, including but not limited to following:

    a) Does it fill a gap within the existing product inventory (e.g., waterfront activities)?

    b) Does it help to extend the visitor season year-round?

c) Is it a "high-quality" experience (e.g., boutique retail)?

d) Does it help to promote green space and natural beauty aligned with "wine country"?

11. Enhance efforts to include and invite First Nations communities to work on tourism initiatives within the Experience Corridors

PRIORITY #3 - Visitor Infrastructure and Investment Attraction

Priority Objective: Approach economic and community development through a tourism lens.

The Tourism Industry is one of the fastest growing industries in the 21st century. Visitor Infrastructure is the key element in tourism development to support balanced growth, as it both supports targeted tourism activity and contributes to consistency and enjoyment of visitor experiences within a destination market.

Infrastructure primarily includes transportation assets (roads, railways, and airports), which make a tourist destination accessible. Within a destination, it will also include parking facilities, municipal services such as public restrooms, sidewalks, footpaths, public information, access ways to public spaces or parks, public transport, bike lanes/paths, conference and meeting facilities, camping facilities, and finally, recreation and sport facilities. It may also include ancillary and complementary facilities, such as, wayfinding signage, equipment, systems, processes, and resources necessary for the functioning of every tourist destination.

It is important to note that tourism infrastructure is crucial to local residents, community businesses and visitors. The infrastructure developed by a community such as NOTL must ensure it is 'mixed use' and balances the requirements of local users and the visitors to the community. Visits by a tourist create additional infrastructure requirements on development such as parks, gardens, open spaces and cultural and arts facilities.

The population of NOTL and that of visiting tourists can have a significant effect on infrastructure development. Visitors use a variety of facilities depending on their priority, but so to do residents. Forecasting resident and visitor demand throughout the year is crucial in determining the amount invested in developing the supporting infrastructure for a destination. This will be a consideration on how MAT funds are utilized to support the priorities of the town.

Tourism infrastructure is typically funded by local government, but often it is supported by senior levels of government (provincial or federal), as it is viewed as public infrastructure. The infrastructure possibilities are based on available funding programs, levels of project and community commitment, stakeholders and overall project assessment.

During the process of our stakeholder engagement, the CBRE Team identified certain priorities relative to tourism infrastructure investment in NOTL and the type of investor required. Many of these projects could be funded through newly acquired MAT revenues (e.g., the 50% allocated to the Town), acting as the driver for other new tourism investment.

Infrastructure Options	Investor Type
Parking structure	Public / Private / P3 Partnership
Old Town visitor infrastructure (public washrooms, water bottle refill stations, crosswalks)	Public
Waterfront infrastructure and activation (boardwalks, public piers, boat launch, drinking fountains, rentals, etc.)	Public / Private / P3 Partnership
Wayfinding / Signage (including Experience Corridors)	Public
Bike lanes & infrastructure	Public
Hop-on Hop-off Bus / Shuttle Service for employees and visitors throughout NOTL	Public / Private / P3 Partnership
Bus coach staging area in Old Town	Public

Public transportation from Glendale to Old Town	Public / P3 Partnership
Needs study for accommodations outside Old Town / Glendale	Public
Medical centre with emergency care	Public
Runway and terminal expansion at Niagara District Airport to increase capacity	Public / Private / P3 Partnerships
Needs study for developing pedestrian only section on Queen Street & associated infrastructure	Public

It would be beyond the scope of the Economic Development & Tourism Director role to determine what the best projects might be moving forward. This will need to be determined in conjunction with the Tourism Strategy Committee and the Town's MAT Committee. However, the CBRE Team strongly recommends that the Town's portion of MAT funding is directed towards visitor infrastructure that supports economic development efforts.

Upon finalization of the NOTL Tourism Strategy and when potential uses for the Town's portion of MAT revenue have been confirmed, there may no longer be a need for both Committees. **It is the CBRE Team's recommendation that the Tourism Strategy Committee continues to work with the Economic Development & Tourism Director in the initial years of implementation and that Council considers integrating representation from the existing MAT Committee on the Tourism Strategy Committee moving forward** (e.g., skillsets related to planning and/or finance).

Also, given tourism's importance to the people of the community, all future infrastructure will need to be considered from a Tourism lens, using the Town's share of MAT revenues allocated to the **NOTL Destination Development Fund** (as detailed in Pillar #1). Projects that rise to the top for future consideration include:

— New parking infrastructure

— Hop-on Hop-off Bus / Shuttle Service for employees and visitors

— Wayfinding (for ECs)

By way of example, allocating funding to a feasibility study to develop parking infrastructure will help to determine the primary location(s) and infrastructure options for NOTL. A study should provide options such as the reuse of existing locations or a new build of an efficient and sustainable asset, along with the parking infrastructure(s) that best complements the surrounding area. Consideration should be given to areas of high impact for both community, visitors and workforce.

Improving traffic flow in and out of NOTL is essential for visitors, residents and incoming workforce. As such, the Town may also look to provide options for strategic highway parking/carpool locations, with access to a shuttle or "hop on hop off" service. A well-planned location with ample parking, ease of shuttle use, green space and user amenities would be ideal. The study may consider a multi-level parking complex as an option. The complex design and exterior façade should complement the EC/area of NOTL the structure resides within. (historic, low impact, green space). Furthermore, parking should be multi-purpose to accommodate washrooms and user amenities, such as garbage bins, EV charging stations, tourist and event information.

There are many ways in which the Town can "advocate" for new visitor infrastructure, without spearheading the process. For instance, the Economic Development and Tourism Director could collaborate with Parks Canada and/or Niagara

Parks to assess and determine the viability of extending shuttle service beyond the route from Fort George to Queen Street, and potentially offering service through the ECs to leading tourism assets. This service would benefit visitors, residents and workforce, offering alternate and less congested options.

The Town can also advocate for NOTL Destination Development Fund revenue to go towards projects that have already been initiated, such as the "Park 'n' Pedal" Plan. Participating with the city planning department to ensure current and future waterfront infrastructure considers waterfront activation for visitors and residents, would also be important.

Other potential initiatives include the review of transportation infrastructure requirements and planning through the lens of both community residents and the visitor, and ensuring senior levels of government are engaged in assessing and planning NOTL's requirements for connecting infrastructure such as bussing, passenger train service and highway planning.

Investment Attraction refers to the pursuit of the identified opportunities by attracting new businesses or enterprises from outside the region to invest in NOTL. This is a process for assessing the community readiness for new opportunities to ensure adequate land, infrastructure (power, water sewer, access to broadband) and the necessary skill sets are available to meet the needs of new businesses, that will fill in gaps or complement other tourism-related businesses in NOTL.

Investment Attraction will be an important consideration to ensure all identified opportunities are explored. The attraction of new investment is dependent on ensuring the proper infrastructure is available in NOTL to grow these opportunities, and requires an "all government" approach, for example: Tourism themes are considered by Planning and Community Development and Services when considering new development.

Finally, fundamental destination management functions include gathering market intelligence (data gathering and analysis, market research, etc.), monitoring the industry, and fostering investments. The Town's Economic Development and Tourism Director will act as the central source to collect data and to distribute market intelligence to the community businesses, residents, and the supporting government organizations. Having quality and current data will also support new and future projects, and any potential support that could be available by senior levels of government.

Visitor Infrastructure and Investment Attraction - Indicators of Success and Strategic Actions

Indicators of Success	Strategic Actions
Municipal roles and responsibilities for tourism investment attraction and visitor infrastructure are established	1. Allocate all Visitor Infrastructure and Investment Attraction related roles and resources to the Town's new Economic Development and Tourism Director. 2. Ensure the Economic Development and Tourism Director is responsible for clearly communicating activities and outcomes to partners and stakeholders, as well as with the leadership of the community, in collaboration with Tourism NOTL. 3. Provide the resources for the Economic Development and Tourism Director to execute on opportunities to attract new investment to NOTL (which may include financial support for travel to meet with targeted investors, partners and businesses.)

	4. Ensure the Town's share of MAT funds are allocated to support not only infrastructure projects, but also resources for an Economic Development and Tourism Director to implement the strategy.
	5. Confirm current state of NOTL investment readiness, including current requirements for a Community Improvement Plan (CIP) to support new investment.
Transportation solutions are identified to support businesses and visitors, including parking, intercommunity transit, and bike lanes	6. Collaborate and explore opportunities with the Chamber, DMO and NOTL's businesses to connect visitors to transit and parking solutions (e.g., shuttle services, offsite parking, community trolley/hop-on-hop-off tours at key attractions) and consider a review of Town-owned land for potential sites for off-site parking and shuttles to Old Town.
	7. Prioritize and plan infrastructure requirements for the Town and using NOTL Destination Development Fund revenue, focusing on:
	a. Parking Infrastructure – conduct a feasibility study for a new parking facility including site review to alleviate downtown parking and visitor parking within the community.
	b. Hop-on Hop-off Bus – collaborate with Parks Canada and/or Niagara Parks to assess potential for a shuttle from Fort George to Queen Street, and potentially through the ECs
	c. NOTL Park 'n' Pedal Plan – complete and implement the plan, ensuring cyclists can enjoy a safe system to connect the tourism businesses and assets in NOTL through bike lanes and trails.
	8. Advocate for enhancements at Niagara Regional Airport and support a regional initiative for future infrastructure planning.
	9. Collaborate with NOTL Community Development & Services to advocate and identify what lands and access is available along the waterfront.
	10. Engage and expand upon work underway in NOTL with the planning department, to ensure that visitors are an important consideration in planning initiatives to develop new infrastructure.
	11. Engage regional partners and the Province of Ontario on planning that includes NOTL's requirements to ensure access and safety of visitors to the community.
An Experience Corridor Wayfinding strategy is initiated, including signage and relevant infrastructure initiatives	12. Develop a 'Wayfinding Strategy' for the community and visitors to better understand the assets in NOTL, linked to the brand and vision of the plan. This would be completed once the ECs are well defined.
	13. Clearly define the approach of the ECs within NOTL and how the corridors can expand the visitor experience and assist with identifying programming that visitors can enjoy (see Priority 2: Product and Experience Development).
	14. Link businesses to the ECs that highlight the unique products of each set of opportunities. The ECs should be targeted at specific audiences and should be considered in Tourism NOTL's Marketing Plan.

PRIORITY #4 - Destination Marketing

Priority Objective: Adopt the Tourism Vision for NOTL as an outward-facing brand, leading with NOTL's best experiences.

The CBRE Team subscribes to the rule of thumb that product development is the first step in marketing. A destination needs to have products and experiences that resonate with residents and visitors before a destination can effectively promote it through positioning statements, branding, marketing campaigns, and advertisements. There is a diverse range of offerings in NOTL, and a wide range of marketing campaigns that support them, but NOTL would benefit from a more data-driven and unifying identity and brand platform.

The following outlines the core steps required for strategic destination marketing on behalf of NOTL as a destination and will largely be carried out by the Town's DMO (Tourism NOTL), in conjunction with the Economic Development and Tourism Director. It will be important that marketing, strategic engagement and brand development initiated by the DMO are integrated with NOTL tourism-related infrastructure projects and stakeholder relations.

1)　Destination Marketing: Strategic Engagement

In a post COVID competitive marketplace, destination marketing requires unique strategic thinking. It will be important for the DMO to develop a supportive integrated marketing plan, with a creative and bold approach to attract, engage and convert potential visitors to extend their stay (and who, in turn, will tell friends and family of their outstanding experiences and return for more).

While today's marketing tools allow for laser precision in the pursuit of a target audience, it requires bold and strategic creative content to engage and hold people's attention. When this is attached to a recognizable and respected brand – it then becomes memorable.

2)　Creating a NOTL Brand that delivers on the Brand Promise

It will be important to develop and launch an experiential consumer **visitor brand** that will be firmly supported by Tourism NOTL's corporate identity and general marketing efforts. The visitor brand will be informed by a range of new and existing products and experiences, as well as related marketing assets. A future thinking approach to brand positioning should capture NOTL's aspirational Tourism Vision:

> **Niagara-on-the-Lake is an extraordinary wine country destination, known for its natural beauty and unrivaled cultural experiences.**

Creating a true consumer visitor brand that will attract both day-trippers and overnight visitors with appropriate tourism products and experiences is key to the future sustainability of NOTL as a destination.

A professional brand is not simply a graphic and a tagline. A brand is as complex as a person, with core beliefs, likes, dislikes, attitudes, nuances. It consistently looks a certain way so whatever the environment it may be in, it is instantly recognizable. Like a person it will develop over time, but it will never deviate from its brand promise which will be developed from the brand positioning statement in the brand strategy.

3)　Update the Marketing Strategy for Tourism NOTL

As with any marketing plan identifying and understanding who the target audience(s) is/are NOTL wants to engage with, is the first step. An in-depth understanding of these "personas" will be the key to delivering relevant information to them when and how these people want to receive it.

This plan will identify and integrate all the marketing items required to create a unified approach to creating marketing campaigns. It will allow the destination to see where strategic partnerships fit and what is required to facilitate successful partnerships.

4) Fine-tune the Digital Environment

In today's digital world a prominent and professional online presence is critical. Mobile technology (Smartphones, tablets, and mobile devices) aligns perfectly with the massive cultural shift in consumer behavior and is a game-changer in the tourism sector, enabling seamless travel experiences. Likewise, the NOTL Tourism web experience needs to be intuitive and easy to use, not too busy, too slow or too old – in style or content. The following are other recommendations for remaining relevant on the digital stage:

— Remaining on the first page of Google is a must. Make sure the NOTL Tourism website is primed for success by providing valuable content, creating unique content, making sure the backend code is optimized by using unique keywords and invisible descriptors of pages and images. Use headers and sub heads to boost rankings and develop backlinks with strategic partners.

— Create interest to gain information. Building an up-to-date database is one of many ways to gain direct access to a potential or returning visitor. Always provide an easy way for people to provide their information via mobile, website etc. Guide them with a compelling call to action.

— As visitors plan their trips online reviews do influence decisions (for good or bad). NOTL can utilize Yelp, google, and trip advisor to build brand awareness.

— Blog consistently – this could be via influencers providing unique information, travel tips or sharing stories. Develop a strategy around a campaign theme.

— Understanding how NOTL's potential visitors use social media is critical to enable specific social media strategic plan(s) for each target audience and their specific channel of choice.

— Short form video is also a game changer for the tourism sector as it delivers a form of interaction for the potential visitor to "see" themselves in that particular environment, live streamed for a sense of authenticity that is not possible from a high production video.

5) Experiential Marketing

Engagement marketing is when visitors literally experience your Brand. It allows someone to experience what the NOTL Brand is about in a personal way, not just through conventional advertising, by using real branded materials in creative ways.

Destination Marketing - Indicators of Success and Strategic Actions

Indicators of Success	Strategic Actions
Roles and responsibilities for marketing and promotion of the destination are allocated	1. Ensure all marketing and promotion, including building the visitor-facing website, are allocated to the Town's DMO: Tourism Niagara-on-the-Lake ("Tourism NOTL") 2. Adapt Tourism NOTL's existing Marketing Strategy to support NOTL's Tourism Vision and initiate branding efforts 3. Collaborate with regional tourism partners to leverage the regional Niagara experience and position NOTL as a hub for a premium wine country experience in Niagara

A visitor-facing brand is developed for NOTL as a destination, distinct from the civic brand identity	4. Undertake a visitor branding exercise for NOTL that aligns with the Tourism Vision and NOTL's civic brand identity.
	    a. Build a dynamic and memorable personality for NOTL's visitor brand– considering NOTL as both a day-trip and overnight destination that is high-quality and appealing
	    b. Create a unique and engaging logo and tagline for the NOTL's visitor brand
	
	5. Develop collateral materials using the new visitor brand
	
	6. Develop a brand manual to educate all stakeholders and strategic partners how to use the new Tourism Brand
	
	7. Work with appropriate strategic partners to grow awareness of the new visitor brand identity and build excitement

Marketing campaigns showcase the best experiences in NOTL's wine country	8. Create an awareness marketing plan to specifically showcase the best experiences in wine country, in alignment with NOTL's tourism Vision statement 9. Build marketing assets for the campaign (e.g., website/micro site, traditional marketing materials, digital materials, videos, direct mail/email campaign, etc.) 10. Aggressively market the Experience Corridors and key existing tourism Product Cluster for wider recognition, promoting on the "best of NOTL"

NOTL's Product Clusters and Experience Corridors continue to align with visitor needs and wants year-round	11. Align NOTL's Product Clusters and Experience Corridors to the needs and wants of its visitor markets
	    a. Establish specific value propositions for NOTL's target audiences and ensure marketing campaigns are specific in their content, language, and benefits for each audience
	    b. Review NOTL's product clusters in relation to historic visitation, as detailed in the Phase 1: Background Review & Initial Findings Report

12. Aggressively market the Experience Corridors and key existing tourism Product Cluster for wider recognition, focusing on year-round experiences, including (but not necessarily limited to):

   a. Seasonal Experience Corridor itineraries

   b. Wine and winery-related experiences

   c. Culinary establishments, products, and experiences

   d. Event and festival venues and experiences

   e. Business event and conference venues and related tourism experiences

   f. Cultural and heritage experiences (including Indigenous Tourism and Black history & heritage experiences)

Action Plan

Action Plan Process

For each strategy there are action items, with key partners identified, the proposed time frame for implementation, the estimated budget (where applicable) and the priority, as detailed below.

The partners section identifies both the **lead** and **partner** organizations or individuals that could contribute to this action, however there may be others who can make a meaningful contribution to these areas.

- There are many potential partnerships that DMC could choose from to effectively implement this Plan, for financial, human, and data/information resources.

The **time frame** provides some guidance to the appropriate timing of these within the five-year time frame of the plan.

- Immediate is within the **first six months** of the plan.

- Short-term is within the **first year**.

- Medium-term is within the **year 2 or 3** of the plan.

- Long-term would be **beyond year 3** of the implementation plan.

- Once implemented, some elements will continue for the duration of the plan and beyond and have been identified as **ongoing**.

The actions are also categorized by **priority**.

- **Critical** actions are essential to the effective implementation of the plan.

- **High priority** actions are deemed as important to the overall success of the plan.

- **Medium priority** items will add to the success of the existing program.

The Action Plan provides the **estimated budget** where appropriate for the various actions. The budget allocations have been estimated based on current market intelligence, but may be subject to change, depending on the project.

The Action Plan also provides the basis for measuring performance. **Performance metrics** link the individual actions in the implementation plan to specific outputs that lead to desired outcomes.

PRIORITY #1 – Governance and Destination Management

PRIORITY OBJECTIVE – Develop a sustainable tourism ecosystem with clear organizational roles, responsibilities and dedicated resources

Indicators of Success	Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget
Leadership is established and capacity building enhanced within NOTL's tourism ecosystem	1. Create a dedicated Economic Development and Tourism Director to manage Tourism at the Town of NOTL, reporting to the CAO; whose role would be to ensure effective implementation of the subject NOTL Tourism Strategy, manage tourism-related infrastructure projects, community and government relations, and liaise with the Tourism Strategy Committee and Tourism NOTL.	**Town of NOTL,** Tourism Strategy Committee	Immediate	Critical	TBD (incremental $30,000 to $40,000 to current budget allocation)
	2. Establish the Tourism Strategy Committee as an ongoing Committee of Council to support the new Economic Development and Tourism Director and provide oversight of the Strategy's implementation	**Town of NOTL,** Tourism Strategy Committee	Immediate	Critical	N/A
	3. Review and execute on recommended roles and responsibilities, and organize implementation of the subject NOTL Tourism Strategy	**Town of NOTL,** Tourism Strategy Committee, Tourism NOTL	Immediate	Critical	N/A
A responsibility framework is formalized and internal processes are established to maintain a sustainable tourism ecosystem in NOTL	4. Review Town of NOTL budget and determine appropriate allocation for new Economic Development and Tourism Director to manage Town tourism-related responsibilities (outlined in Exhibit 2).	**Town of NOTL (Council and Finance),** Tourism Strategy Committee, MAT Committee	Immediate	Critical	N/A
	5. Revise Memorandum of Understanding (MOU) and accountability framework between the Town of NOTL and Tourism NOTL to ensure sufficient resources are allocated to tourism-related roles and responsibilities, and that roles and responsibilities are clearly defined (as outlined in Exhibit 2).	**Town of NOTL, Tourism NOTL**	Immediate	Critical	$2,500 (legal fees)
	6. Provide updates to Council (quarterly at most) to reinforce the importance of tourism to NOTL's economy.	**Town of NOTL,** Tourism Strategy Committee	Short-term and ongoing	High	N/A
	7. Consider hosting an annual Town Hall in collaboration with the DMO to provide tourism updates.	**Town of NOTL,** Tourism NOTL	Short-term	High	$5,000 annually (hosting and materials)
	8. Implement system of regular checks on tourism roles and responsibilities for accountability purposes	**Town of NOTL,** Tourism Strategy Committee	Short-term and ongoing	High	N/A

Goal	#	Action	Responsibility	Timeframe	Priority	Budget
All municipal decisions are assessed through a tourism lens, including the Town's share of MAT revenue investment moving forward	9.	Schedule regular meetings between the Town's Economic Development and Tourism Director and other Town departments to ensure tourism initiatives are communicated and needs of the tourism industry are being met.	**Town of NOTL (various departments)**	Immediate and ongoing	High	N/A
	10.	Develop an overall goal for use of the Town's share of MAT revenue: to ensure NOTL is a profitable and sustainable destination for visitors, businesses and residents	**Town of NOTL,** Tourism Strategy Committee, MAT Committee	Immediate	Critical	N/A
	11.	Develop two distinct funds to support NOTL's goal for use of the Town's share of MAT revenue: **NOTL Destination Management Fund** Purpose: To support development of a new Economic Development & Tourism Director to manage tourism at the Town level with associated resources; reporting directly to the CAO. **NOTL Destination Development Fund** Purpose: To support for new and/or enhanced visitor and resident infrastructure, focusing on ways to capitalize on "wine country" and cultural experiences	**Town of NOTL,** Tourism Strategy Committee, MAT Committee	Immediate	Critical	$2,500 (legal fees)
	12.	Determine budget allocations for each category and adjust on an annual basis.	**Town of NOTL,** Tourism Strategy Committee, MAT Committee	Immediate	High	N/A
	13.	Select projects and infrastructure initiatives that promote and support tourism and economic development efforts that benefit both visitors and residents, through use of an Evaluation Matrix for Destination Development Fund allocation	**Town of NOTL,** Tourism Strategy Committee, MAT Committee	Short-term and ongoing	Critical	N/A
Resources and support are provided for tourism related businesses in NOTL, and in turn improve the guest experience	14.	Create an information and awareness program to educate and inform tourism related businesses, tourism stakeholders, and residents on the economic benefits and impact of the visitor economy.	**Town of NOTL**	Short-term	High	$5,000
	15.	Collaborate with the NOTL Community & Development Services department to support the sustainability and expansion of tourism businesses, with a focus on their unique needs.	**Town of NOTL,** Chamber of Commerce	Short-term	High	N/A
	16.	Develop a suite of information, data, and training resources to support tourism related businesses, including for example: a. Visitor friendliness checklist b. Data analysis (sector studies, Prizm segment descriptions) c. Links to training programs and resources d. Links to other supporting tourism organizations (RTO2, TIAO, Destination Ontario, Culinary Tourism Alliance, TIAC, Niagara Aspiring Global Geopark, etc.) e. Funding programs	**Town of NOTL,** Chamber of Commerce	Short-term and ongoing	High	$25,000 (database set-up, analysis and materials)

Theme	#	Action	Responsible	Timeframe	Priority	Cost
	f.	Calendar of major tourism events and festivals taking place in Niagara-on-the-Lake				
	17.	Enhance the guest experience for visitors who are already coming to NOTL to ensure they stay longer and do more in the community a. Encourage operators to direct guests to the DMO website for itineraries and accommodation ideas b. Ensure visitors are provided with many touch points to obtain directions to other activities, transit, parking, etc. c. Provide tools for businesses to cross-promote	**Tourism NOTL**, Town of NOTL, NOTL Ambassadors	Short-term	High	$5,000
	18.	Create a visitor-friendliness plan to help tourism businesses direct residents and visitors to notable assets and experiences within NOTL (e.g., drive visitors to different parts of the Experience Corridors)	**Third-party consultant,** Tourism NOTL, Town of NOTL	Medium-term	High	$15,000
	19.	Make it easier for event organizers to manage costs and receive permits for celebrations, festivals, and events within the Town (e.g., at community parks)	**Town of NOTL,** Chamber of Commerce	Short-term	Medium	N/A
The online visitor experience is streamlined	20.	Identify and eliminate any tourism websites for NOTL experiences that are currently not functioning	**Tourism NOTL**, Town of NOTL	Short-term	Medium	N/A
	21.	Isolate and develop the Tourism NOTL website as the only visitor-facing website	**Tourism NOTL**	Short-term	High	$10,000
	22.	Develop a webpage on the Town's website for tourism-related businesses, potential investors and residents to interact, in collaboration with the Chamber of Commerce	**Town of NOTL,** Tourism NOTL, Chamber of Commerce	Short-term	High	$5,000
Platform established for interactive communication between the municipality, businesses, and residents	23.	Build an online platform to encourage and facilitate collaboration between tourism businesses on the Town's website	**Town of NOTL,** Tourism NOTL, Chamber of Commerce	Short-term	High	(included in above)
	24.	Collaborate with Tourism NOTL to organize regular meetings (e.g., quarterly) with tourism businesses to learn about new initiatives and opportunities for future collaboration	**Town of NOTL,** Tourism NOTL	Short-term and ongoing	Medium	$2,500 (hosting and materials)
	25.	Introduce and provide regular updates to the public on NOTL Tourism Strategy implementation, focusing on the importance of sustainability for strategic success	**Town of NOTL,** Tourism Strategy Committee	Short-term and ongoing	High	N/A
Regular collection and analysis of meaningful visitor data to support product development,	26.	Develop a program to track visitation to NOTL through: a. macro 3rd-party data b. industry-generated data (segmented by festivals/events, major business events in hotels, sporting events)	**Town of NOTL / Third party data provider,** Tourism NOTL	Medium-term and ongoing	High	$30,000 (data provider and database set-up)
	27.	Work with partners to undertake annual visitor surveys to gain a qualitative understanding of visitors' perception of NOTL's tourism offerings	**Tourism NOTL**	Medium-term	High	N/A

Category	#	Action	Lead / Partners	Timeline	Priority	Cost
investment attraction, visitor infrastructure	28.	Work with the Tourism Partnership of Niagara (TPN / RTC2) and Niagara Economic Development to undertake enhanced visitor research and analysis	**Town of NOTL,** Tourism NOTL, TPN, Niagara Economic Development	Medium-term	Medium	N/A
development and marketing	29.	Collect and track tourism economic development statistics, in collaboration with external partners (like TPN), including: a. New and enhanced investment into tourism assets and experiences b. The number of tourism-related businesses and the associated employment using the Tourism Asset Inventory, and c. The economic impact of NOTL's visitor economy by measuring visitor spending, the attributable GDP portion, and infrastructure associated with new/enhanced investments.	**Town of NOTL / Third-party consultant**	Medium-term	High	$20,000
	30.	Contribute data regularly to the suite of information, data, and training resources to support tourism related businesses.	**Town of NOTL,** Chamber of Commerce	Medium-term	Medium	N/A
	31.	Ensure public awareness of tourism strategy implementation success	**Town of NOTL,** Tourism NOTL	Short-term and ongoing	High	N/A

PRIORITY #1 Performance Measures

Output/Outcome	Performance Measure
Tourism Leadership Established and Capacity Building Enhanced	– Economic Development and Tourism Director role established and filled – Tourism Strategy Committee terms extended – Defined roles and responsibilities for Tourism Strategy Committee – # of Committee meetings Held – Level of participation per meeting annually – Defined roles and responsibilities for tourism split between Town and Tourism NOTL
Responsibility Framework Formalized and Internal Processes Established for Tourism Organizational Structure	– Increased collaboration and initiatives between Town and Tourism NOTL – $ invested in salaries/wages – $ of MAT revenue invested in support of economic development and tourism projects (destination management) – $ of MAT revenue invested in tourism infrastructure (destination development) – # of destination development projects underway – Level of budget invested in Economic Development – Evaluation Matrix complete for Destination Development Fund projects – # of projects initiated using Destination Development fund – # of projects completed (in future) – $ allocated from City/external sources in addition to MAT portion

Tourism Education and Awareness Plan Implemented
- # of tourism businesses using Town of NOTL information and training tools
- # of cross-promotion campaigns identified between operators
- Visitor-friendliness plan in place for NOTL
- Positive feedback about NOTL tourism initiatives from local businesses on social platforms
- # of businesses participating in a Spark program
- # of Meetings with other Town departments to discuss tourism initiatives
- Semi-annual review of tactics to reach related strategic goals# of tourism operators using DMC web platform for collaboration

Tourism Businesses are Successful and Well-Supported
- # of new operator initiatives underway
- # of tools for businesses to cross promote
- # of businesses promoting each other online
- # of businesses aware of NOTL Tourism Strategy

Enhanced Visitor Experience
- # of visitors using Tourism NOTL website for itineraries and accommodation ideas
- # of operators directing visitors to Tourism NOTL website

Enhanced Online Visitor Experience
- # of visitors attending events
- Level of visitor satisfaction
- level of visitor spending
- Positive feedback about Tourism NOTL and Town of NOTL initiatives from visitors on social platforms
- # of complaints from visitors using dysfunctional websites
- # of hits / conversion rate for Tourism NOTL website

Enhanced Resident Experience
- # of residents aware of Tourism NOTL and Town of NOTL tourism initiatives
- # of residents attending events with tourism businesses
- Positive feedback about Tourism NOTL and Town of NOTL initiatives from residents on social platforms
- # of residents aware of NOTL Tourism Strategy

Business Intelligence & Research Informs Tourism Initiatives
- Macro-data visitation tracking program developed
- Industry-generated visitation data tracking program developed
- Research and advocacy program developed

Data Tracking & Collection Leads to Destination Enhancements
- # of partners participating in providing industry-generated data
- # of joint initiatives with Tourism Partnership of Niagara (TPN)
- # of annual visitor survey respondents
- # of festivals, events, conferences, etc. contributing to event data
- # of investment into new/enhanced tourism assets and experiences
- # of tourism-related businesses and associated employment

- Increase in economic impact of NOTL's visitor economy, including $ visitor spending and attributable $ GDP portion
- # of overall room nights occupied in overnight accommodations
- Index of room nights by month measuring seasonality (where a sustainable destination has little seasonality and generates room nights year round)

PRIORITY #2 – Product and Experience Development

PRIORITY OBJECTIVE – Adopt a strategy to enhance the Town's best assets, define the Experience Corridors, and capitalize on new developments to broaden NOTL's market base

Indicators of Success	Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget

A Product and Experience Development plan is identified, and responsibilities assigned	1. Define the Product and Experience Development Plan for NOTL:
	  a. Enhance what exists today and categorize those offerings into Product Clusters
	  b. Develop NOTL's Experience Corridors (ECs) and integrate products clusters
	  c. Attract new products and experiences for NOTL that fit within the Experience Corridors
		Tourism NOTL, Town of NOTL, Tourism Strategy Committee	Immediate	Critical	N/A

	2. Allocate all responsibilities related to Experience Corridor and product cluster development, itinerary-building, and marketing ECs to Tourism NOTL.	**Town of NOTL,** Tourism NOTL, Tourism Strategy Committee	Immediate	Critical	N/A
	3. Allocate all roles related to tourism strategy implementation, tourism-related infrastructure project management, and investment attraction to the Town of NOTL under the new Economic Development and Tourism Director.	**Town of NOTL,** Tourism NOTL, Tourism Strategy Committee	Immediate	Critical	N/A
A responsibility framework is formalized and internal processes are established to maintain a sustainable tourism ecosystem in NOTL	4. Utilize the asset inventory created by CBRE to establish NOTL's Tourism Product Cluster Inventory	**Tourism NOTL,** Town of NOTL, Tourism Strategy Committee	Immediate	Critical	N/A

	5. Develop NOTL's Product Clusters and define the product offering and visitor appeal within each Cluster:
	  a. Arts, culture and theatre
	  b. Agri-tourism
	  c. Heritage & historic experiences
	  d. Wineries & related experiences
	  e. Nature & outdoor activities (including gardens)
	  f. Culinary experiences & restaurants
	  g. Major festivals & events
	  h. Breweries, distilleries & cideries
	  i. Retail & shopping
	  j. Recreation & sport
	  k. Conferences & business events
	  l. Spas & wellness
		Tourism NOTL, Town of NOTL, Tourism Strategy Committee	Short-term	Critical	$25,000

	Action	Responsibility	Timeframe	Priority	Cost
	6. Create itineraries that build upon the draw of NOTL's "Wine country" experiences to increase length of stay	**Tourism NOTL**	Short-term and ongoing	High	$5,000
	7. Create digital tours (e.g., downloadable walking tours, maps, etc.).	**Tourism NOTL**	Short-term and ongoing	High	$5,000 (app fee)
NOTL's Experience Corridors are defined and established, and products are identified within each grouping	8. Identify main travel routes through NOTL and define boundaries and theming for each of the six (6) NOTL ECs, including but not necessarily limited to: a. Niagara Stone Road (55) b. York Road (89) connecting Glendale to St. Davids and Queenston c. Niagara River Parkway d. Lakeshore Road (87) e. Queen Street / Historic Old Town f. Four Mile Creek Road (100)	**Tourism NOTL, Town of NOTL,** Tourism Strategy Committee, TPN	Immediate	High	N/A
	9. Initiate a wayfinding strategy that incorporates both hard assets (signage) and digital navigation (based on digital maps and directions) for each of the ECs.	**Third-party consultant,** Town of NOTL, Tourism Strategy Committee	Short-term	Critical	$100,000
Gap assessment criteria are created for the Experience Corridors to encourage new investment and development	10. Create assessment criteria to help guide new investment within NOTL's ECs, including but not limited to following: a. Does it fill a gap within the existing product inventory (e.g., waterfront activities)? b. Does it help to extend the visitor season year-round? c. Is it a "high-quality" experience (e.g., boutique retail)? d. Does it help to promote green space and natural beauty aligned with "wine country"?	**Town of NOTL,** Tourism Strategy Committee, Tourism NOTL	Medium-term	High	N/A
	11. Enhance efforts to include and invite First Nations communities to work on tourism initiatives within the Experience Corridors	**Town of NOTL,** Tourism NOTL, local Indigenous community members	Short-term	High	$3,000 (meetings and materials)

PRIORITY #2 Performance Measures

Output/Outcome	Performance Measure
Product and Experience Development Plan Established	– Roles established for Experience Corridor and product cluster development with Tourism NOTL – Year 1 Action Plan and tactics identified for Product and Experience Development Plan
Tourism Product Clusters Defined	– Tourism asset inventory established and maintained – Products and experiences defined within 12 product clusters – # of experiences/itineraries created from asset inventory

- Range of experiences available in NOTL enhanced within 12 product clusters
- # of new itineraries created for "wine country" experiences
- # of itineraries available online
- # of downloads of itineraries
- # of participating tourism operators in tourism itineraries
- # of participating operators/ attractions
- Participation in visitor and operator satisfaction surveys

NOTL Experience Corridors In Place

- Main travel routes and boundaries for Experience Corridors ("EC"s) defined
- # of experiences along each EC
- Wayfinding strategy and EC navigation actions underway:
  - Digital base map established
  - # of clicks on links to digital map
  - Wayfinding strategy established and implemented
  - Share of tourism assets and itineraries incorporating digital map links
  - Funding secured to support wayfinding strategy and implementation
- # of positive impressions from visitors including mention of ECs
- # of operators promoting their products & experiences within ECs

New Investment in Tourism

- Gap assessment criteria developed
- # of new investors interested in ECs
- # of gaps filled in NOTL tourism product inventory
- # of year-round experiences
- # of "high-quality" experiences
- # of new indigenous tourism experiences
- # of meetings with First Nations communities

PRIORITY #3 – Visitor Infrastructure and Investment Attraction

PRIORITY OBJECTIVE – Approach economic and community development through a tourism lens

Indicators of Success		Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget
Municipal roles and responsibilities for tourism investment attraction and visitor infrastructure are established	1.	Allocate all Visitor Infrastructure and Investment Attraction related roles and resources to the Town's new Economic Development and Tourism Director.	**Town of NOTL,** Tourism Strategy Committee	Immediate	Critical	N/A
	2.	Ensure the Economic Development and Tourism Director is responsible for clearly communicating activities and outcomes to partners and stakeholders, as well as with the leadership of the community, in collaboration with Tourism NOTL.	**Town of NOTL,** Tourism Strategy Committee, Tourism NOTL	Immediate	Critical	N/A
	3.	Provide the resources for the Economic Development and Tourism Director to execute on opportunities to attract new investment to NOTL (which may include financial support for travel to meet with targeted investors, partners and businesses.)	**Town of NOTL,** Tourism Strategy Committee	Immediate	Critical	TBD (dependent on Priority #1 – Action 4)
	4.	Ensure the Town's share of MAT funds are allocated to support not only infrastructure projects, but also resources for an Economic Development and Tourism Director to implement the strategy.	**Town of NOTL,** Tourism Strategy Committee, MAT Committee	Immediate	Critical	TBD (dependent on Priority #1 – Action 4)
	5.	Confirm current state of NOTL investment readiness, including current requirements for a Community Improvement Plan (CIP) to support new investment.	**Third-party consultant,** Town of NOTL	Immediate	Critical	$75,000
Transportation solutions are identified to support businesses and visitors, including parking, intercommunity transit, and bike lanes	6.	Collaborate and explore opportunities with the Chamber, DMO and NOTL's businesses to connect visitors to transit and parking solutions (e.g., shuttle services, offsite parking, community trolley/hop-on-hop-off tours at key attractions) and consider a review of Town-owned land for potential sites for off-site parking and shuttles to Old Town.	**Town of NOTL,** Tourism NOTL, Chamber of Commerce, Parks Canada, Niagara Parks, Niagara Region, individual businesses	Short-term	Critical	$2,500 (meetings and materials)
	7.	Prioritize and plan infrastructure requirements for the Town and using NOTL Destination Development Fund revenue, focusing on: a. Parking Infrastructure – conduct a feasibility study for a new parking facility including site review to alleviate downtown parking and visitor parking within the community. b. Hop-on Hop-off Bus – collaborate with Parks Canada and/or Niagara Parks to assess potential for a shuttle from Fort George to Queen Street, and potentially through the ECs	**Third-party consultant,** Town of NOTL, Tourism Strategy Committee, Parks Canada, Niagara Parks, individual businesses	Short-term	Critical	$25,000 to $50,000

	Action	Lead / Partners	Timeframe	Priority	Reference
	c. NOTL Park 'n' Pedal Plan – complete and implement the plan, ensuring cyclists can enjoy a safe system to connect the tourism businesses and assets in NOTL through bike lanes and trails.				
	8. Advocate for enhancements at Niagara Regional Airport and support a regional initiative for future infrastructure planning.	**Town of NOTL**, Niagara Regional Airport	Medium-term	High	N/A
	9. Collaborate with NOTL Community Development & Services to advocate and identify what lands and access is available along the waterfront.	**Town of NOTL**	Medium-term	Medium	N/A
	10. Engage and expand upon work underway in NOTL with the planning department, to ensure that visitors are an important consideration in planning initiatives to develop new infrastructure.	**Town of NOTL**	Medium-term	Medium	N/A
	11. Engage regional partners and the Province of Ontario on planning that includes NOTL's requirements to ensure access and safety of visitors to the community.	**Town of NOTL**, Niagara Region	Medium-term	Medium	N/A
An Experience Corridor Wayfinding strategy is initiated, including signage and relevant infrastructure initiatives	12. Develop a 'Wayfinding Strategy' for the community and visitors to better understand the assets in NOTL, linked to the brand and vision of the plan. This would be completed once the ECs are well defined.	**Third-party consultant,** Town of NOTL, Tourism Strategy Committee	Short-term	Critical	See Priority #2 – Action 9
	13. Clearly define the approach of the ECs within NOTL and how the corridors can expand the visitor experience and assist with identifying programming that visitors can enjoy (see Priority 2: Product and Experience Development).	**Town of NOTL,** Tourism NOTL, Tourism Strategy Committee	Immediate	Critical	See Priority #2 – Action 2
	14. Link businesses to the ECs that highlight the unique products of each set of opportunities. The ECs should be targeted at specific audiences and should be considered in Tourism NOTL's Marketing Plan	**Town of NOTL,** Tourism NOTL	Short-term	Critical	N/A

PRIORITY #3 Performance Measures

Output/Outcome	Performance Measure
Roles and Responsibilities for Tourism Investment Attraction and Visitor Infrastructure Established	– New Economic Development and Tourism Director role includes visitor infrastructure and investment attraction responsibilities – Year 1 Action Plan and tactics identified – Level of financial resources available for economic development and tourism – MAT Destination Development Funds – Study underway to confirm NOTL's investment readiness – Investment in a Community Improvement Plan – # of municipal departments aware of tourism initiatives
Transportation Solutions in Place	– # of meetings with industry partners on transportation & parking solutions – # of presentations made/reports published on potential transportation solutions

- # of stakeholders participating in brainstorming meetings
- # of solutions identified (transportation and parking)
- Parking Infrastructure
  1) Feasibility study underway for new parking structure
  2) E-commerce issues with meters addressed
  3) Positive feedback from residents on parking solutions
- Hop-on Hop-off Bus
  1) # of meetings with Parks Canada and Niagara Parks
  2) Trial shuttle test run in place
  3) Routes identified for trial shuttle
- NOTL Park 'n' Pedal
  1) Plan completed and responsibilities allocated for implementation
  2) # of bike lanes and trails created
  3) # of cyclists using the bike lanes and trails
  4) # of business promoting bike lanes and trails
- Investment into Niagara Regional Airport
- # of airlines using Niagara Regional Airport
- # of packages between Airport and local accommodations and attractions
- # of waterfront sites identified for potential tourism investment
- # of new infrastructure projects that directly mention benefits for visitors AND residents
- # of new regional tourism partnerships
- # of updates provided annually to Council on the importance and economic benefit of tourism in NOTL

Experience Corridors (ECs) Established

- Wayfinding strategy underway (see Product Development PMs)
- # of visitors enjoying ECs
- # of new/enhanced tourism products within identified gap areas established
- Wider scope of visitor origin (# km travelled)
- Increased visitor length of stay (# of nights)
- Increased visitor satisfaction with NOTL's tourism offerings

Enhanced Tourism Investment in NOTL

- Investment attraction tool (such as booklet/webpage/PDF) is created
- # of leads generated through tool
- # of new/enhanced tourism assets as a result of investor activity
- # of tourism infrastructure projects identified
- # of projects completed (in future)
- # of meetings with Black community leaders
- # of meetings with Indigenous community leaders

— $ allocated from Town/external sources in addition to MAT portion

PRIORITY #4 – Destination Marketing

PRIORITY OBJECTIVE – Adopt the Tourism Vision for NOTL as an outward-facing brand, leading with NOTL's best experiences

Indicators of Success	Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget
Roles and responsibilities for marketing and promotion of the destination are allocated	1. Ensure all marketing and promotion, including building the visitor-facing website, are allocated to the Town's DMO: Tourism Niagara-on-the-Lake ("Tourism NOTL")	**Tourism NOTL,** Town of NOTL, Tourism Strategy Committee	Immediate	Critical	N/A
	2. Adapt Tourism NOTL's existing Marketing Strategy to support NOTL's Tourism Vision and initiate branding efforts	**Tourism NOTL,** Town of NOTL, Tourism Strategy Committee	Immediate	Critical	N/A
	3. Collaborate with regional tourism partners to leverage the regional Niagara experience and position NOTL as a hub for a premium wine country experience in Niagara	**Tourism NOTL,** Tourism Strategy Committee, TPN, regional municipalities	Immediate	High	N/A
A visitor-facing brand is developed for NOTL as a destination, distinct from the civic brand identity	4. Undertake a visitor branding exercise for NOTL that aligns with the Tourism Vision and NOTL's civic brand identity. a. Build a dynamic and memorable personality for NOTL's visitor brand– considering NOTL as both a day-trip and overnight destination that is high-quality and appealing b. Create a unique and engaging logo and tagline for the NOTL's visitor brand	**Third-party consultant /** **Tourism NOTL,** Town of NOTL, Tourism Strategy Committee	Immediate	Critical	$50,000 (brand strategy)
	5. Develop collateral materials using the new visitor brand	**Third-party consultant /** **Tourism NOTL,** Tourism Strategy Committee	Immediate	Critical	$10,000 to $15,000
	6. Develop a brand manual to educate all stakeholders and strategic partners how to use the new Tourism Brand	**Third-party consultant /** **Tourism NOTL,** Tourism Strategy Committee	Short-term	Critical	$5,000 to $8,000
	7. Work with appropriate strategic partners to grow awareness of the new visitor brand identity and build excitement	**Tourism NOTL,** Town of NOTL, Tourism Strategy Committee, individual businesses	Short-term	High	N/A
Marketing campaigns showcase the best experiences	8. Create an awareness marketing plan to specifically showcase the best experiences in wine country, in alignment with NOTL's tourism Vision statement	**Third-party consultant /** **Tourism NOTL,** Tourism Strategy Committee	Short-term	High	$10,000

	Description	Responsibility	Timeframe	Priority	Cost
experiences in NOTL's wine country	9. Build marketing assets for the campaign (e.g., website/micro site, traditional marketing materials, digital materials, videos, direct mail/email campaign, etc.)	**Third-party consultant / Tourism NOTL,** Tourism Strategy Committee	Short-term	High	$50,000-$100,000 for web development, print materials, etc. (NOTE each video costs $10,000 excl. media buy)
	10. Aggressively market the Experience Corridors and key existing tourism Product Cluster for wider recognition, promoting on the "best of NOTL"	**Tourism NOTL, individual businesses**	Short-term	Critical	TBD
NOTL's Product Clusters and Experience Corridors continue to align with visitor needs and wants year-round	11. Align NOTL's Product Clusters and Experience Corridors to the needs and wants of its visitor markets a. Establish specific value propositions for NOTL's target audiences and ensure marketing campaigns are specific in their content, language, and benefits for each audience b. Review NOTL's product clusters in relation to historic visitation, as detailed in the Phase 1: Background Review & Initial Findings Report	**Tourism NOTL,** Town of NOTL	Medium-term	High	N/A (Included in Priority #2)
	12. Aggressively market the Experience Corridors and key existing tourism Product Cluster for wider recognition, focusing on year-round experiences, including (but not necessarily limited to): a. Seasonal Experience Corridor itineraries b. Wine and winery-related experiences c. Culinary establishments, products, and experiences d. Event and festival venues and experiences e. Business event and conference venues and related tourism experiences f. Cultural and heritage experiences (including Indigenous Tourism and Black history & heritage experiences)	**Tourism NOTL, individual businesses**	Medium-term	High	TBD

PRIORITY #4 Performance Measures

Output/Outcome	Performance Measure
Tourism NOTL Recognized for Marketing and Promotion of NOTL	— NOTL's Marketing Strategy adapted to support NOTL's Tourism Vision — # of regional partners working with Tourism NOTL on tourism initiatives — $ invested in Tourism NOTL's visitor-facing website — # of hits on Tourism NOTL's website

NOTL has a Recognizable Visitor Brand and Identity

- Outside agency completes Visitor Brand strategy & new brand developed for Tourism NOTL
- The Visitor Brand's brand manual is being followed by all parties (marketing partners, in-house designers, stakeholders, strategic partners, tour operators, media companies, etc.)
- Uptake, momentum of organic growth of Visitor Brand through social media, keyword and hashtag searches
- Increased traffic and positive feedback regarding Visitor Brand experience via regular surveys tied to campaigns

NOTL is Recognized for its a Unique Wine Country Experiences

- Recognition and buy in of the new Visitor Brand Logo and messaging
- Recognition of & buy in of a new dynamic and memorable personality for NOTL's visitor brand that appeals to both day-trip and overnight visitors
- Uptake, momentum of organic growth of Tourism NOTL through social media, keyword and hashtag searches
- Website + social media + paid advertising analytics to track specific marketing campaigns targeted to visitors
- Analysis of visitor and operator interaction on website to track success of targeted marketing campaigns and check the alignment of products to visitor queries and satisfaction
- Analysis of visitor traffic and feedback regarding visitor experience and product development via regular surveys
- # of views tracked from video campaigns and accompanying digital ads via specific call to action to a dedicated campaign landing page on Tourism NOTL's website
- $ invested in website content development, showing increased traffic in general
- # of website visits based on specific campaigns with directed audience messaging to identified target audiences
- # of click-throughs to operator websites
- # of operators uploading information and packages/interacting with member portal
- # of engagements via social media posts – specifically around Tourism NOTL's promotion of new product and experience itineraries that include 12 product clusters
- Growth of existing and new subscribers via Visitors Brand newsletter to increase CRM data
- Positive responses to social media re: content creation of products and services from visitors and operators

Next Steps

The CBRE Team will prepare a high-quality formatted version of the Final Tourism Strategy, Masterplan and Action Plan, and will present the subject report to the Tourism Strategy Committee, followed by a presentation to the Lord Mayor and members of Council.

PHASE 1	PHASE 2	PHASE 3	PHASE 4	PHASE 5
Environmental Scan & Destination Analysis	**Economic Impact Assessment**	**Vision and Focus**	**Draft Strategy, Masterplan & Action Plan**	**NOTL Tourism Strategy, Masterplan & Action Plan**
Key Tasks	**Key Tasks**	**Key Tasks**	**Key Tasks**	**Key Tasks**
—Literature Review	—Benchmarking & Performance Metrics	—Visioning Session	—Recommended Draft Strategy	—Final NOTL Tourism Strategy, Masterplan and Action Plan Report
—Stakeholder Consultation	—Economic Impact Assessment Review	—Draft Vision, Focus, and Strategic Priorities	**Deliverables**	—High Quality Publication
—Asset Inventory	**Deliverables**	**Deliverables**	—*Draft Report: Nov 30*	—Final Presentations
—Organizational Review	—*Draft Report Due: Jun 30*	—*Strategic Priorities Memo due: Sep 15*	—*TSC Presentation: Dec 18*	**Deliverables**
—PESTLE & SWOT	—*TSC Meeting #1: Aug 15*	—*Visioning Session: Sep 20*	—*Incorporate Edits to Draft Strategy*	—*Final Report (unformatted): Jan 31*
Deliverables	—*TSC Meeting #2: Sep 7*	—*Draft Report Due: Oct 6*	—*Draft Final Strategy and Draft Action Plan: Jan 2024*	—*Final Report Presentation to TSC and Council (TBC)*
—*Draft Report Due: Jun 9*	—*Council Presentation: Sep 19*	—*TSC Presentation: Oct 16*		
—*TSC Meeting #1: Aug 15*				
—*TSC Meeting #2: Sep 7*				

Appendix A – CBRE Assumptions and Limiting Conditions

1. The report, including its conclusions and any portion of such report (the "Report"), is as of the date set forth in the letter of transmittal and based upon the information, market, economic, and property conditions and projected levels of operation existing as of such date. The dollar amount of any conclusion as to value in the Report is based upon the purchasing power of the Canadian Dollar on such date. The Report is subject to change as a result of fluctuations in any of the foregoing. CBRE Limited. through its appraiser and/or advisor (collectively, "CBRE") has no obligation to revise the Report to reflect any such fluctuations or other events or conditions which occur subsequent to such date.

2. Unless otherwise expressly noted in the Report, CBRE has assumed that if any information inconsistent with any of the foregoing assumptions is discovered, such information could have a substantial negative impact on the Report. Accordingly, if any such information is subsequently made known to CBRE, CBRE reserves the right to amend the Report, which may include the conclusions of the Report. CBRE assumes no responsibility for any conditions regarding the foregoing, or for any expertise or knowledge required to discover them. Any user of the Report is urged to retain an expert in the applicable field(s) for information regarding such conditions.

3. CBRE has assumed that all documents, data and information furnished by or behalf of the client, property owner, or owner's representative are accurate and correct, unless otherwise expressly noted in the Report. Such data and information include, without limitation, numerical street addresses, lot and block numbers, Assessor's Parcel Numbers, land dimensions, square footage area of the land, dimensions of the improvements, gross building areas, net rentable areas, usable areas, unit count, room count, rent schedules, income data, historical operating expenses, budgets, and related data. Any error in any of the above could have a substantial impact on the Report. Accordingly, if any such errors are subsequently made known to CBRE, CBRE reserves the right to amend the Report, which may include the conclusions of the Report. The client and intended user should carefully review all assumptions, data, relevant calculations, and conclusions of the Report and should immediately notify CBRE of any questions or errors within 30 days after the date of delivery of the Report.

4. CBRE assumes no responsibility (including any obligation to procure the same) for any documents, data or information not provided to CBRE, including without limitation any termite inspection, survey or occupancy permit.

5. Any cash flows included in the analysis are forecasts of estimated future operating characteristics based upon the information and assumptions contained within the Report. Any projections of income, expenses and economic conditions utilized in the Report, including such cash flows, should be considered as only estimates of the expectations of future income and expenses as of the date of the Report and not predictions of the future. Actual results are affected by a number of factors outside the control of CBRE, including without limitation fluctuating economic, market, and property conditions. Actual results may ultimately differ from these projections, and CBRE does not warrant any such projections.

6. No opinion is expressed on matters which may require legal expertise or specialized investigation or knowledge beyond that customarily employed by real estate appraisers. Any user of the Report is advised to retain experts in areas that fall outside the scope of the real estate appraisal profession for such matters.

7. Acceptance or use of the Report constitutes full acceptance of these Assumptions and Limiting Conditions and any special assumptions set forth in the Report. It is the responsibility of the user of the Report to read in full,

comprehend and thus become aware of all such assumptions and limiting conditions. CBRE assumes no responsibility for any situation arising out of the user's failure to become familiar with and understand the same.

8. The maps, plats, sketches, graphs, photographs, and exhibits included in this Report are for illustration purposes only and shall be utilized only to assist in visualizing matters discussed in the Report. No such items shall be removed, reproduced, or used apart from the Report.

9. The Report shall not be duplicated or provided to any unintended users in whole or in part without the written consent of CBRE, which consent CBRE may withhold in its sole discretion. Exempt from this restriction is duplication for the internal use of the intended user and its attorneys, accountants, or advisors for the sole benefit of the intended user. Also exempt from this restriction is transmission of the Report pursuant to any requirement of any court, governmental authority, or regulatory agency having jurisdiction over the intended user, provided that the Report and its contents shall not be published, in whole or in part, in any public document without the written consent of CBRE, which consent CBRE may withhold in its sole discretion. Finally, the Report shall not be made available to the public or otherwise used in any offering of the property or any security, as defined by applicable law. Any unintended user who may possess the Report is advised that it shall not rely upon the Report or its conclusions and that it should rely on its own appraisers, advisors and other consultants for any decision in connection with the subject property. CBRE shall have no liability or responsibility to any such unintended user.

Thank you

For more information

REBECCA GODFREY, CMC, MBA
Senior Vice President
CBRE Tourism Consulting
647 943 3743
rebecca.godfrey@cbre.com

CBRE VALUATION & ADVISORY SERVICES