TOWN OF LAKESHORE

TOURISM DEVELOPMENT STRATEGY

FINAL REPORT

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IBI GROUP

1.0 TOURISM DEVELOPMENT STRATEGY

1.1 Introduction

This Tourism Development Strategy is an integral component of the Town of Lakeshore Community Services Master Plan. The Draft Official Plan for the Town of Lakeshore articulates the objective of ensuring that Lakeshore is Economically Progressive and Successful. In support of this objective, a number of strategies have been outlined related to tourism, including promoting the Town as a tourist and recreational destination.

1.2 Tourism Trends

Advances in travel technology, transportation and tourism infrastructure, and growing affluence have propelled tourism into one of the world's largest industries, accounting for 1 in 12 jobs. The World Tourism Organization (WTO) predicts continued growth in travel and tourism over the next decade. However, the nature of tourism activity will change, and some of these changes will be profound. The rise of India and China and the emergence of newly affluent consumers in these countries, the changing travel behaviour of North American baby boomers and the impact of the internet on buying behaviour are just of few of the factors that will shape tourism in the coming decades.

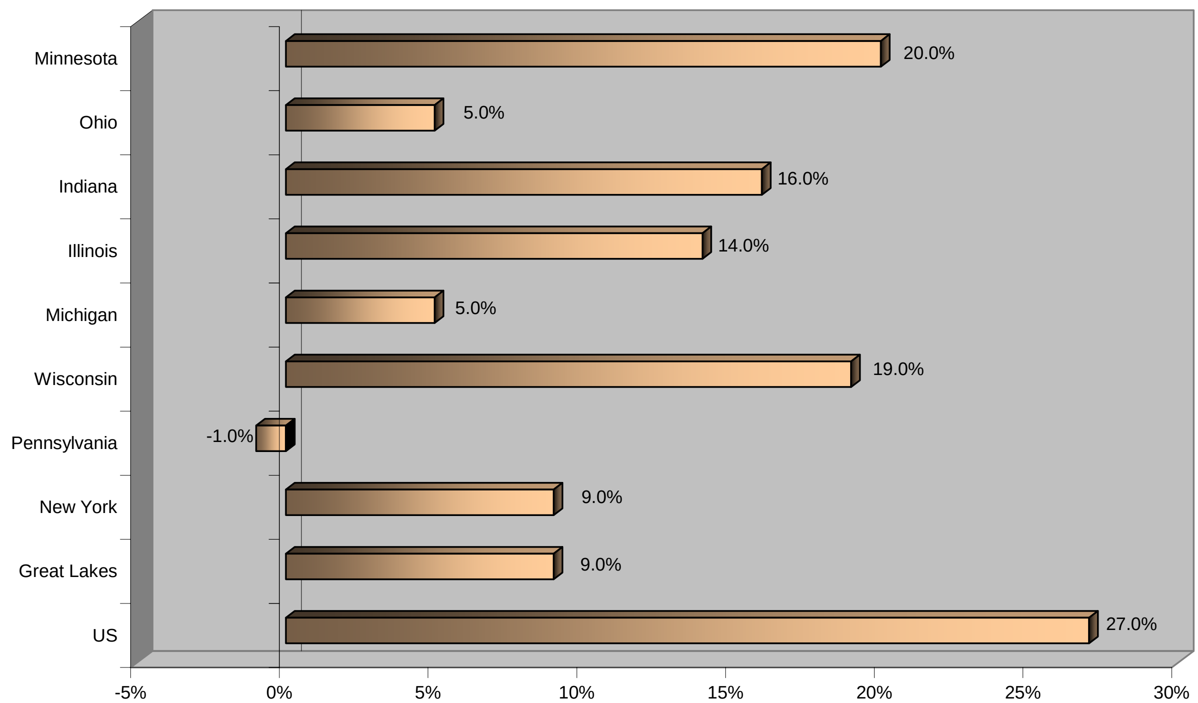
While some of these trends will have only minimal impact on travel to the Town of Lakeshore over the next short to medium term, a tourism development strategy must address tourism infrastructure and capital assets that have an economic life measured in decades, not years. Accordingly, we have provided an overview of the major trends expected to influence the tourism sector over the next two decades.

1.2.1 THE CHANGING NATURE OF THE NORTH AMERICAN POPULATION

North America's population is aging and this will impact the tourism sector. Over the next two decades, the proportion of the population under the age of 55 will decline and the proportion over the age of 55, and in particular over the age of 65 will increase significantly. Ontario's population will not only be proportionately older in two decades, it will also be proportionately less wealthy. Household composition will also change, with an increase in adult only households.

The US border states account for the greatest share of US visitation to Ontario, and the outlook for these markets is mixed. While the border states will continue to hold a large percentage of the US population, the nature of the market will change. As seen in the following chart, these areas will lag behind the rest of the U.S. in population growth, with some states projected to see a decline in total population. Mature and senior citizens will continue to migrate from the border states to the south and southwest. The border states will account for a somewhat lower share of the total U.S. population, and that population will see a pronounced decline in disposable income.

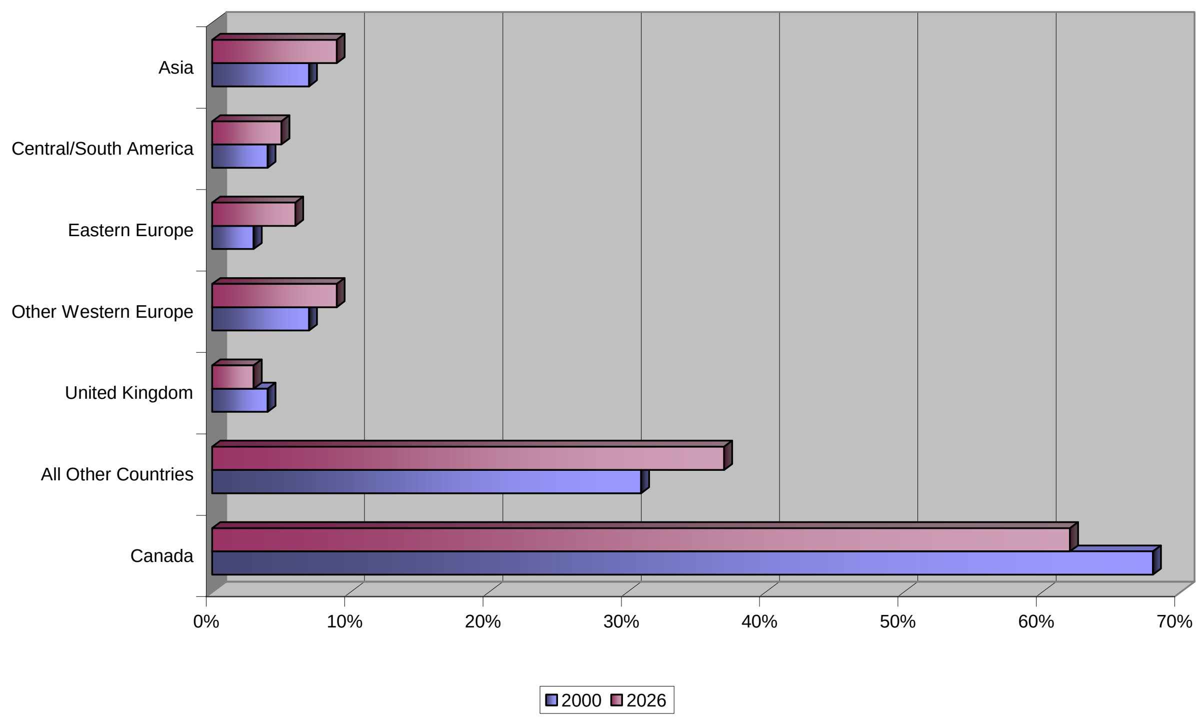
Population Growth (%) 2000 - 2025



The aging of North America's population is projected to show a shift away from more active vacation pursuits such as soft and hard adventure, downhill skiing, fishing and even golf towards experiential or discovery-oriented vacations such as cultural activities, horticulture or culinary.

The make-up of Ontario's population is projected to change over the next 20 years, as an increasingly large percentage of the population consists of those born outside of Canada.

Composition of Ontario's Population, by Place of Birth



The changing composition of families will have a significant impact on how, when and where people travel. The traditional nuclear family is changing, being replaced by "vertical" families with three and even four co- existing generations, from great grandparents to children. The traditional family vacation, with two adults and two or more children on holiday for seven to ten days, is being replaced by parents with only one child, single parents with children, and multi-generational families. The increasing proportion of society choosing not to marry will also fuel higher demand for vacation products oriented to the single traveller.

1.2.2 SHORTER VACATIONS . . . AND PERHAPS LONGER?

The trend towards shorter and more frequent vacations is not new. Competing commitments to family, career and personal interests sparked this trend as baby boomers entered their peak earning years in the 1970s. Those pressures are equally relevant for the Echo Boomers, who will become the predominant age cohort for the short vacation break.

The first wave of baby boomers are now empty nesters. With retirement close at hand, travel patterns may change. Much has been made of the trillion dollar inheritance windfall looming for the baby boom generation. Those fortunate enough to share in this windfall will have the time, the desire and the financial wherewithal to satisfy individual tastes. The “experience economy”, where consumers are defined by what they do, not by what they own, will influence travel choices for these consumers. International travel, never more affordable or accessible, may see increased demand from this market. Over the next two decades, it is very possible that we will see a marked increase in longer trips, both in duration and distance for these newly affluent baby boomers.

However, there is another side to the baby boom phenomenon, and that is their impact on health care and other social program costs. In the key US markets, in particular, the looming health care crisis may adversely impact leisure travel, particularly amongst the baby boom generation, as the cost of private coverage eats into discretionary income.

1.2.3 LAST MINUTE BOOKING AND INTERNET USAGE

These two trends are inextricably linked, and the shocks to the travel and tourism sector over the past five years have certainly accelerated both. The immediate and pervasive nature of news media has highlighted the risks associated with international travel. The tsunami in the South Pacific, terrorist attacks in Europe and assaults on Canadian travellers in Mexico have been widely covered by the 24 hour news channels, provoking concerns for personal safety and changing patterns in travel.

Personal concerns for safety are not likely to abate, and the trend towards last minute booking is expected to accelerate as travellers survey conditions “on the ground” prior to making their final plans. The Internet facilitates this trend by providing easy access to up to date information and travel advisories, and as a channel for buying vacation products. The travel trade has developed shorter vacations to help move excess inventory, thereby rewarding consumers for last minute booking.

1.2.4 WESTERN HEMISPHERE TRAVEL INITIATIVE

In 2005 the U.S. Departments of State and Homeland Security announced the Western Hemisphere Travel Initiative (WHTI), which will require all travellers to and from the Americas, including the United States, Canada and Mexico, to carry a passport or other accepted document(s) to enter or re-enter the United States.

Beginning December 31, 2006, everyone traveling by air or sea to the United States required a passport. Implementation of the land-border restrictions has been delayed several times, and is not likely to proceed until 2009. The Conference Board has estimated that the WHTI, if fully implemented, could reduce overnight travel to Canada by Americans by 1.6 million trips, with

Ontario bearing the brunt of the loss. A significant share of this lost visitation will be in same day travel, and will therefore have the greatest impact of Ontario's border cities and regions.

The WHTI is expected to also reduce trips by Canadians to the U.S. and encourage some substitution with Canadian travel. However, the net effect is still a significant loss of U.S. travel should this Initiative go through without further amendment.

1.2.5 EMERGING MARKETS

New markets of staggering potential are beginning to emerge in countries such as China and India, as well as Eastern Europe, the Gulf States, Australia, Korea and South American. These emerging markets will play an increasingly important role in international travel over the next two decades, if only because of the huge populations in these countries.

The emerging Chinese market has captured the greatest attention, and is arguably the largest future source of international travel. Between 1995 and 2004, personal travel expenditures by Canada's key international markets (the United Kingdom, Germany, France and Japan) increased by 17%, while travel expenditures by Chinese residents increased by 420% and are now equivalent to 10% of the combined expenditures of Japan, Germany, France and the United Kingdom.

Canada has yet to receive Approved Destination Status (ADS), although this is expected within the very near future. Conservative estimates call for an average annual increase in Chinese visitation of approximately 15% once ADS has been secured. In 2004, arrivals were approximately 102,000 which put China in the same league as Taiwan, Hong Kong, or the Netherlands, but well behind Canada's traditional priority markets. The Canadian Tourism Commission is targeting business travellers, 'Frequent Travellers' and young, western-influenced travellers. The most promising of these segments would appear to be the 'Frequent Travellers', who are generally older, with more discretionary income and leisure time and as a segment are growing faster than the overall population.

First time Chinese visitors will concentrate on Canada's travel icons – the cities of Vancouver, Toronto and Montreal, and major tourist destination such as Banff and Niagara Falls. Most regions in Canada, including Essex Region, will see little or no increase in Chinese visitation. The downside risk is that the national and provincial tourism agencies, in an effort to capture this growing market, will divert funds away from Canada's traditional US and European markets, to the detriment of mainstream tourist operators.

1.2.6 INCREASE IN SHARED INTEREST AND SOCIAL GROUP TRAVEL

The travel and tourism market is continuing to see an increase in shared interest and social groups travelling together. A shared passion such as photography, marathons, or genealogy, for example, may be the reason for the travel or simply the glue that binds the group together. These groups have less formal influencers and will seek destinations that meet their distinct needs. As the influence of shared interest and social group travel grows, segmentation will continue to narrow.

1.2.7 DESTINATION MARKETING RESOURCES

Destination Marketing Funds have become increasingly common in Canada over the past decade. Legislated models are in place in the majority of provinces, while voluntary programs have been adopted in many Ontario cities. In 2006, destination marketing funds in Ontario totalled more than $35 million, and destination marketing organizations with access to these funds could become increasingly important decision makers in setting tourism marketing strategies at the provincial level.

While it is too soon to identify all of the ramifications of the influx of these new marketing resources, we anticipate that cities with DMF programs such as Ottawa, Kingston, Sault Ste. Marie and St. Catharines will focus their new marketing programs on Toronto. Thus, Ontario's primary domestic market will become increasingly competitive over the next five years. These same second tier cities in Ontario have the potential to draw from the drive market in the U.S. border states. However, such campaigns could only be effective if they were coordinated, and done in conjunction with the provincial marketing organization. Should the second tier municipalities join forces, they may be able to influence provincial and even national tourism marketing strategies and resource allocations.

1.2.8 THE INTERNET AND TECHNOLOGY

Use of the Internet by travellers, meeting planners and travel trade to plan and book travel will evolve as changes in technology continue.

The increasing use of hand-held, web-enabled devices such as telephones, PDAs and Blackberrys, supported by on-line mapping and global positioning systems, will allow travellers to plan and book while on the go. Local search engines that provide more relevant search results are also emerging.

The Internet provides destinations and individual businesses with tools to further engage the visitor. These tools include web logs or 'blogs', podcasts, virtual tours and audio or video-clips. In New York City, for example, visitors can download podcasts to their I-Pod and hear Robert DeNiro take them on a tour of Tribeca.

Really Simple Syndication (RSS) allows users to subscribe for live feeds of new information as it is posted. This tool provides media, meeting planners, travel trade and individual travellers an opportunity to subscribe to feeds of information relevant to their interests.

1.3 Glossary of Terms

Agri-tourism – leisure travel linked to agriculture and/or rural products, services and experiences. Farm vacations, winery or vineyard tours, harvest festivals and farmers' markets are examples of agri-tourism experiences.

Core Attraction – Tourism products that are, or have the potential to be, the principal draw for visitors to the Town of Lakeshore.

Heritage Tourism – leisure travel linked to participation in cultural or heritage activities such as visiting museums or historic sites, aboriginal tourism products or festivals.

Festival and Event Tourism – leisure travel linked to festivals and special events, including fairs, culinary, musical or ethnic celebrations.

Food and Beverage – establishments offering prepared food for consumption on or off the premises. Includes licensed and unlicensed tableservice restaurants, quickservice convenience operations and licensed lounges, bars and taverns.

Market Ready – tourism products or services ready to meet the demands of their respective target markets for quality and scope of service and facilities.

MCIT – Meetings, Convention and Incentive Travel.

Sport Tourism – leisure travel motivated by participation in a sports tournament or related activity (e.g. coaching clinic, training camp) as an active participant, volunteer or spectator.

Travel Trade – those businesses and service providers involved in arranging and delivering group tours.

VFR – Visiting Friends and Relatives. This is one of the most common reasons for leisure travel.

2.0 TOURISM PROFILE

The principal sources of tourism statistics in Canada are Statistics Canada's Canadian Travel Survey and International Travel Survey. In 2005 Statistics Canada changed its definition of domestic travel, and as a result domestic figures are only available up to the year 2004. International travel statistics are available for 2005. The following profiles have been developed using available information from the Ontario Ministry of Tourism, the Canadian Tourism Commission and Statistics Canada.

Ontario's tourism sector sustained a number of shocks during the past six years, beginning with the world-wide downturn in travel following the terrorist attacks on September 11, 2001. Travel, and in particular overnight travel, rebounded in 2002, only to suffer a precipitous decline in 2003 year as SARS, West Nile Virus, BSE, a strengthening Canadian dollar, rising fuel costs and the war in Iraq combined to create the "perfect storm" for Ontario's tourism sector. Total tourism receipts have increased modestly since 2003, due in large part to the efforts of cities such as Toronto and Ottawa in attracting high-yield European and Asian visitors. However, for the vast majority of Ontario tourism operators that rely on domestic and American visitors, there has been little improvement in the past five years.

2.1 Tourism Profile – Southwestern Ontario

Southwestern Ontario accounts for approximately 12% of total visits to Ontario and just over 10% of overnight visits to the province. In 2004, total "person visits" to southwestern Ontario were 13.8 million, unchanged from the previous year but down by 8% from 2002. Much of the decline was in same-day visitation. Overnight visits, which dropped by almost 10% in 2003, rebounded strongly in 2004 to nearly the same level reported in 2002.

The composition of the visitor market has changed significantly over the past five years, with domestic travel accounting for an increasing share of total volume, and notable declines in visitation from the US.

Southwestern Ontario Person Visits by Country of Origin 2001 – 2004				
	2001	**2002**	**2003**	**2004**
Total Visits from Canada	9,958,714	11,623,026	11,035,587	11,013,999
Overnight Visits from Canada	3,261,121	3,966,289	3,692,872	4,031,749
Total Visits from United States	3,169,884	3,218,844	2,706,904	2,693,444
Overnight Visits from United States	805,399	868,517	678,070	760,331

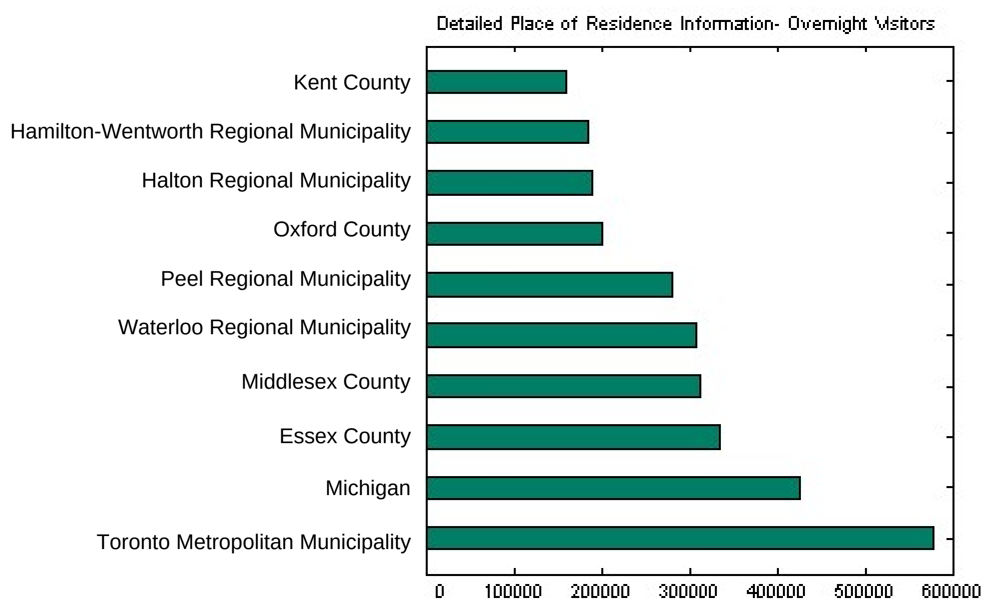
Total US visitation to southwestern Ontario declined by 8.3% in 2005, while overnight visits by Americans remained relatively stable.

Complete visitation statistics are not available beyond 2004. However, we believe that the travel patterns reported provincially reflect the experience in southwestern Ontario. On a province-wide basis, overnight visitation from the US declined by 5% in 2006, ending the year 16% below the "high water mark" achieved in 2002. For the first four months of this year, inbound traffic from the United States is down by almost 22% from the same period in 2006.

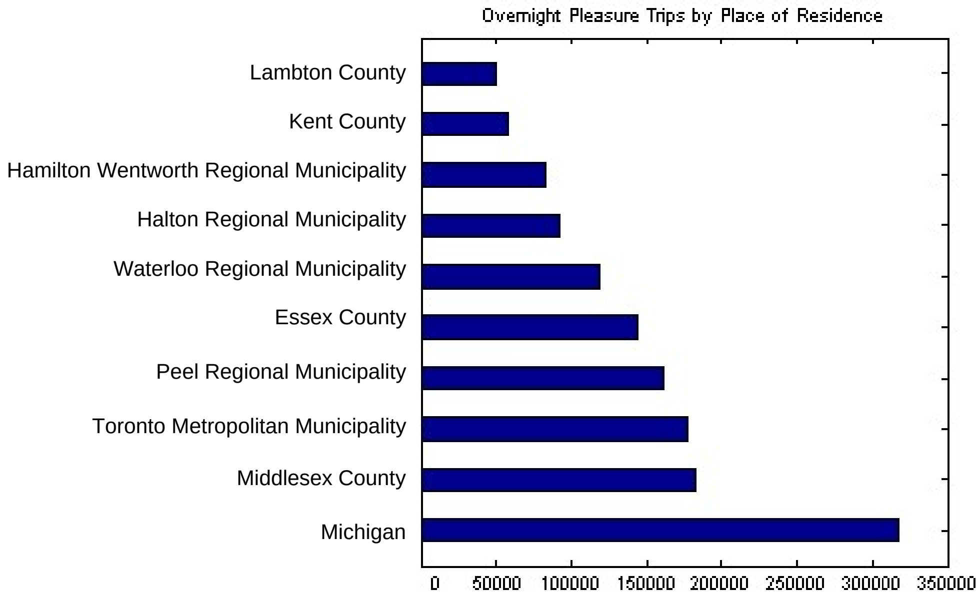
The decline in US visitation to southwestern Ontario is particularly worrisome, as the US visitor generates much greater economic impact than a domestic visitor. As seen in the following table, the primary trip motivator for domestic visits is Visiting Friends & Relatives (VFR), which generates less revenue for commercial accommodation, attractions and retail operations. American visits, on the other hand, are primarily for pleasure.

Southwestern Ontario: Overnight person visits by main purpose and place of origin				
	2001	**2002**	**2003**	**2004**
Overnight pleasure (Canada)	1,399,361	1,610,876	1,416,002	1,512,043
Overnight VFR (Canada)	1,500,260	1,863,820	1,833,371	1,947,274
Overnight business (Canada)	181,028	197,154	181,535	246,811
Overnight pleasure (US)	491,366	545,228	426,882	480,027
Overnight VFR (US)	185,836	189,176	147,267	159,959
Overnight business (US)	49,482	62,069	47,927	60,294
Overnight pleasure (Other Countries)	22,238	19,732	14,316	25,930
Overnight VFR (Other Countries)	41,484	42,908	36,148	42,286
Overnight business (Other Countries)	11,349	15,262	9,671	11,237

Additional detail on the place of origin for overnight visitors in 2004 is shown in the following table:



The strong showing from the Greater Toronto Area reflects the high volume of business and VFR travel originating from the GTA. If we focus exclusively on the higher-yield overnight pleasure travel in 2004, the importance of traffic from the nearby border states is highlighted.



2.2 Tourism Profile – Essex Region

Total person visits to Essex Region declined by almost 30% between 2001 and 2004, from 9.4 million person visits to 6.6 million. Virtually this entire decline was in same day visits; overnight visits dropped by approximately 8% or 110,000 visits during the same period. As seen earlier with the statistics for southwestern Ontario, domestic travel to the region actually increased during this period, while travel from the US declined.

Essex Region Person Visits by Country of Origin 2001 – 2004				
	2001	2002	2003	2004
Total Visits from Canada	1,848,591	1,636,919	1,742,027	1,923,939
Overnight Visits from Canada	770,509	679,340	620,252	716,212
Total Visits from United States	7,555,028	6,202,027	5,246,379	4,619,498
Overnight Visits from United States	521,137	556,535	456,486	458,274

Total visits from the United States declined a further 11% in 2005, while overnight visits from the US remained stable.

Visitation from other countries grew by almost 80% between 2001 and 2005, although the market is quite small, estimated at approximately 36,700 total visits and 26,100 overnight visits in 2005.

Essex Region: Overnight visits by trip purpose and visitor origin	2001	2002	2003	2004
Overnight pleasure (Canada)	201,272	171,598	181,662	212,523
Overnight VFR (Canada)	361,867	358,247	337,099	349,453
Overnight business (Canada)	158,322	81,984	47,036	73,449
Overnight pleasure (US)	259,936	275,676	225,888	224,561
Overnight VFR (US)	133,173	139,967	115,135	115,083
Overnight business (US)	27,959	32,029	25,958	25,260
Overnight pleasure (Other Countries)	5,691	3,323	4,793	8,451
Overnight VFR (Other Countries)	5,365	7,592	7,254	9,371
Overnight business (Other Countries)	925	720	2,029	2,643

The largest source of overnight pleasure trips to Essex Region is the state of Michigan, accounting for 11% of all trips, followed by Ohio (6%) and Toronto (3%).

2.3 Tourism Resources – Town of Lakeshore

Within the Town of Lakeshore, the following businesses constitute the principal tourism infrastructure. (Businesses have been categorized using the Premier Ranked Tourism Destination framework.)

Town of Lakeshore		
Business Name	**Location**	**Business Category & Description**
La Petit Dragon Motel	165 First St, Belle River, ON	Built Recreational/Commercial Infrastructure – Accommodation - Motel Mid Market
Stone Garden	582 Notre Dame Street, Belle River, Ontario	Built Recreational/Commercial Infrastructure – Accommodation – B&B
Rochester Place RV, Golf & Marine Resort	981 County Rd.2, Belle River, Ontario	Built Recreational/Commercial Infrastructure – Recreational/Resort Developments – Marina
Belle River Municipal Marina	100 Lake Road, Belle River, ON	Built Recreational/Commercial Infrastructure – Recreational/Resort Developments – Marina
Deerbrook Marina Inc.	1023 County Road 2 St. Joachim, Ontario	Built Recreational/Commercial Infrastructure – Recreational/Resort Developments – Marina
Cove Marina	466 Tisdelle Drive, Lighthouse Cove, Tilbury, Ontario	Built Recreational/Commercial Infrastructure – Recreational/Resort Developments – Marina
Puce River Harbour	930 Old Tecumseh Road, Lakeshore Ontario	Built Recreational/Commercial Infrastructure – Recreational/Resort Developments – Marina

St. Clair Shores Campground	2358 St. Clair Road, Stoney Point, ON	Land based recreation opportunities – camping
Reel Happy Charters	P.O Box 1357, Belle River, Ontario	Water Based Recreation Opportunities – Fishing
Captain Dan Charters	1073 Buckingham Drive, Windsor, ON	Water Based Recreation Opportunities – Fishing
Can-Am Charters	Deerbrook Marina, St. Joachim, ON	Water Based Recreation Opportunities – Fishing
John Freeman Walls Historical Site & Underground Railroad Museum	Conc.6, R.R.#3, Essex, Ontario	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
Maidstone Bicentennial Museum	1093 Puce Road, Maidstone	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
Comber & District Historical Society Museum	10405 Highway 77	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
Tremblay Beach Conservation Area	St. Clair Road, Lakeshore ON	Land and Water Based Opportunities – Bird watching Water-based recreation opportunities – swimming/beach
Lakeview Park	100 Lake Road, Belle River ON	Water-based recreation opportunities– swimming/beach; boating. Built Recreational /Commercial Infrastructure – Recreational/Resort Developments – Marina
Ruscom Shores Conservation Area	Surf Club Drive, Deerbrook, ON	Land and Water Based Opportunities – Bird watching
Wagner Orchards & Estate Winery	1222 8th Concession Road Maidstone, ON	Built Recreational/Commercial Infrastructure – Attractions – Winery
Maidstone Conservation Area	County Road 25	Natural Resource Opportunities – Conservation Area
Big “O” Conservation Area	Elizabeth Street, Comber, ON	Land and Water Based Opportunities – Bird watching
Sunsplash Festival	Belle River BIA	Cultural and Heritage Resource Opportunities – Cultural Attractions - Festivals
Nearby Major or Related Attractions and Events		
Uncle Tom’s Cabin	29251 Uncle Tom’s Road, Dresden, ON	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
North American Black Historical Museum	277 King Street, Amherstburg, ON	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
Fort Malden National Historic Site	100 Laird Avenue Amherstburg, Ontario	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
Buxton National Historic Site & Museum	Shadd Road, North Buxton, Ontario	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
Park House Museum	214 Dalhousie St, Amherstburg, Ontario	Cultural and Heritage Resource Opportunities – Cultural Attractions – Museum
Point Pelee National Park	407 Monarch Lane, RR 1 Leamington, Ontario	Land and Water Based Opportunities – Bird watching Water-based recreation opportunities – swimming/beach

Casino Windsor	377 Riverside Drive East Windsor, Ontario N9A 7H7	Built Recreational/Commercial Infrastructure – Attractions – Casino/Gaming
International Freedom Festival	Windsor & Detroit waterfront	Cultural and Heritage Resource Opportunities – Cultural Attractions - Festivals

This inventory of tourism infrastructure includes only a few of the more notable “non core” attractions available in the region, such as Casino Windsor or Point Pelee National Park. There are many other attractions available in Essex Region that, while not directly related to the core attractions found in the Town of Lakeshore, do increase the appeal of Essex Region for the Touring, Culture & Heritage market segments.

3.0 TOURISM RESOURCE EVALUATION

We have organized our tourism resource evaluation into three principal areas:

1. Tourism product – attractions, events and other tourism experiences available in the Town of Lakeshore and the surrounding region.

2. Tourism infrastructure and services – facilities and services providing support to tourists visiting the region, including accommodation, retail, food and beverage, wayfinding, visitor information services, public assembly facilities, sports and entertainment facilities.

3. Tourism leadership and management – collective and individual leadership at the strategic and operational level by tourism stakeholders, as well as the organizational and governance models that facilitate such leadership.

3.1 Tourism Product

A healthy and vibrant tourism sector is obtained when a destination offers:

- Distinctive core attractions
- Quality and critical mass
- Accessibility
- Suitable tourism infrastructure, and in particular sufficient quality accommodation
- Ongoing destination marketing
- Ongoing product renewal

Of these, the Core Attraction is the most critical element. It represents the features, facilities or experiences that act as the primary motivator for most travel to the region. The Core Attraction may vary by season (e.g. golf in summer, skiing in winter) and it may be either a single asset (e.g. the Grand Canyon) or an assembly of experiences. The shopping, dining, farmers market, outlet mall, and heritage attractions of St. Jacobs would not, individually, constitute a Core Attraction, but taken together they do. To be successful, tourist destinations must offer sufficient Core Attractions to sustain interest for at least 24 hours, and Core Attractions should be offered throughout the year.

Critical mass is required to draw visitors from distant markets, to lengthen the average stay, and support the experience offered by the Core Attraction. Critical mass requires both On-Theme Activities (i.e. attractions and activities related to the Core Attraction) as well as Generic Activities. Shopping, dining and entertainment opportunities are particularly important Generic Activities, as they rank high on the list of desired activities for most tourist market segments regardless of the Core Attraction.

A successful tourist destination offers accommodation across a range of price points, quality and service offerings. The ability to provide overnight “fixed roof” accommodation (e.g. hotels, motels, bed & breakfasts, resorts) is critical to the success of any tourism strategy, as it broadens the market beyond the “day trip” category and greatly enhances the economic impact. Accommodation partners also add to the available destination marketing resources, as they typically invest far more than foodservice and retail establishments in non-local marketing.

Based on our review of available research reports and our interviews with tourism stakeholders, we believe that the major Core Attraction for the Town of Lakeshore is Water-Based Recreational Opportunities, in particular Sportfishing. With further development and a strategy to focus tourism-related activities, Lakeview Park has the potential to play a larger role in the Town’s tourism strategy, and to be positioned as a focal point for regional tourism activities. Heritage and Culture attractions, while limited, can be considered a secondary or Supporting Attraction. With further development, Heritage and Culture could become another Core Attraction for the Town of Lakeshore.

3.1.1 SPORTFISHING AS A CORE ATTRACTION

Profile of the Sportfishing Tourist

Based on information presented in the Travel Activities and Motivation Survey (“TAMS”), we can compile the following profile of the Fishing enthusiast:

- 4.5% of Canadian population and 5.3% of American population
- 5.1% of Canadian travelers and 6.0% of American travelers
- Average age 42.5 years. 75% are between the ages of 26 to 55
- 46.4% university or college education
- 55.8% employed, 14.7% self-employed, 14.0% retired

This market segment shows a generally low propensity to participate in other activities while traveling. Cultural & Entertainment activities such as shopping & dining, museums & historical sites, concerts, carnivals & festivals are of relatively little interest to this market segment, although they do show a somewhat higher than average interest in French Canadian cultural experiences. They also showed relatively low interest in other Outdoor Activities such as golf or sightseeing.

We understand that the sportfishing in Lake St. Clair, and in particular on the Ontario side of Lake St. Clair most proximate to the Town of Lakeshore, is of high quality. Musky fishing, often described as "the fish of a thousand casts" has improved dramatically in recent years, with charter boats now reporting in excess of a dozen fish landed per day during the peak season. Sportfishing can be considered a Core Attraction as it offers a high quality, memorable experience and is more accessible to the large urban markets of Michigan and Ontario than other highly-regarded sportfishing locations offering a comparable experience (e.g. St. Lawrence River, French River).

Ontario's sportfishing operators in the region face a number of challenges, including:

- A declining US market. Tighter border security, delays and confusion over document requirements have contributed to a decline in US visitation to virtually all tourist operations in the region, and this trend has been evident in the decline in US sportfishing visitors.
- Fisheries Management Practices – the fisheries management practices of Ontario's Ministry of Natural Resources are more onerous than those of the US border states. Restrictions on the use of live bait, daily catch and possession limits put Ontario charter boats at a competitive disadvantage.
- Charter boat requirements – similarly, it is more expensive to operate a charter boat in Ontario than in the nearby US border states.
- Increased competition from US operators. The decline in the salmon fishery in Lake Huron has led to many US charter boats focusing their efforts on Lake St. Clair.
- Infrastructure and capacity – many of the commercial marinas in the area have the majority of their land based infrastructure located south of the railway line, limiting the size of boat that can access their docks and launch ramps. Additionally, many of the marinas and campgrounds are focused primarily on seasonal, as opposed to transient use, with the majority of their campsites and dock slips rented to the same client for the entire season. This type of utilization typically generates less direct and indirect economic spin-off for the community than the transient tourist.

The lack of critical mass in sportfishing operations means that Lake St. Clair fishing opportunities receive relatively little attention from the Ministry of Tourism. In fact, the only references to Lake St. Clair fishing on the Ministry of Tourism site are advertisements placed by operators such as Deerbrook Marina. Sportfishing on Lake St. Clair also suffers from a lack of promotion in comparison to other sportfishing destinations in the province. For example, the Ontario Muskie Alliance is a group of twenty sport fishing operators in three separate regions of Ontario – North-western Ontario, Georgian Bay/Lake Nipissing and the Kawartha Lakes. This group has received considerable support from the Ontario Ministry of Tourism to promote fishing opportunities in its regions, and to promote specific fishing packages for its members. Lake St. Clair is not even mentioned as a muskie fishing destination on this site, and there are no packages or links to any marina, charter boat or guiding operations in the area.

The outlook for sportfishing in the region, therefore, is mixed. Charter boat operators and recreational anglers face a number of problems. Many American anglers are now using charter boats from Michigan or Ohio for their outings on Lake Erie and Lake St. Clair, rather than traveling to Essex County and using an Ontario charter boat. Charter boat captains interviewed for this study reported that American anglers, once representing between 50% and 70% of their clientele, now represent less than 10%. A similar trend was reported by the marina operators catering to the independent angler (i.e. those with their own boat and equipment). Finally, rising fuel costs and the recent strength of the Canadian dollar are a problem for all tourism operators catering to American visitors. While much of the lost traffic from the US has been replaced with Ontario boaters and anglers, rising fuel costs also present a challenge in attracting domestic visitors from the Greater Toronto Area and beyond.

The outlook for tournament fishing, on the other hand, is somewhat more positive. The changing regulations regarding live bait and daily catch limits do not impact tournament anglers. Those that participate regularly on the tournament circuit are generally quite knowledgeable regarding documentation requirements, and the WHTI has not yet had any apparent impact, although this may change with the implementation of new document requirements for land crossings in 2008. The major challenges facing tournament fishing on Lake St. Clair are rising fuel costs and the strengthening Canadian dollar, which may adversely affect those traveling from the US or from more distant locales in Ontario.

3.1.2 HERITAGE AS A SUPPORTING ATTRACTION

Profile of the Heritage Tourist

The Heritage Enthusiast is defined as a tourist whose recent leisure trips to or in Canada included at least four of the following activities:

Aboriginal cultural experience in a rural setting	Western theme events
Pow Wow or other aboriginal celebration	Farmers fair or market
Aboriginal attraction	Local festival or fair
French Canadian cultural experience	Childrens' museum
Carnivals such as Caribana	General history museum
Historical replicas of cities/towns	Science or technology museum
Historic sites	Pick your own farms/harvesting

The Canadian Heritage Tourism Enthusiast

Of the 23.3 million Canadian adults in 2000, about 2.6 million are Heritage Tourism Enthusiasts (11%). Of these, over 80% claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic market for Canada's heritage products is approximately 2.2 million adults.

Compared to the total market for all leisure tourism experiences over the past couple of years, domestic Heritage Tourism Enthusiasts are under-represented among younger Canadians, and especially among those between 18 and 34 years. This age group represents 1-in-3 domestic travellers as a whole (33%) but only 1-in-4 Heritage Tourism Enthusiasts (25%).

Most Heritage Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. About one-third are likely to be in the market for heritage tourism experiences that take into account the interests and needs of teenagers or children (34%).

Heritage Tourism Enthusiasts are also somewhat more affluent than the "typical" domestic traveller in Canada, with an average household income of $60,000 compared to $54,900 for the typical leisure visitor in Canada (1998 dollars). Higher household incomes are consistent with higher levels of formal education - over one-quarter of Heritage Tourism Enthusiasts have at least one university degree (28%) and a further 42% have had some post-secondary education.

By definition, Heritage Tourism Enthusiasts participate in multiple heritage-related activities while on trips. The most popular heritage activities – sought by between one-half and one- third of these tourists while on a trip in the past couple of years – span museums, farmers' markets, festivals and historic sites.

Activities Engaged in by more than 30 per cent of Heritage Tourism Enthusiasts:	
General history museums (86%)	Historic sites (55%)
Farmers' fairs or markets (67%)	Historical replicas of cities/towns (54%)
Local festivals or fairs (65%)	Pick your own farms / harvesting (39%)
Science & tech museums (58%)	French Canadian cultural experiences (31%)
Activities Engaged in by 10% to 30% of Heritage Tourism Enthusiasts:	
Children's museums (25%)	Aboriginal cultural experiences (18%)
Western theme events (19%)	Aboriginal attractions (16%)

The US Heritage Tourism Enthusiast

Of the 200.4 million American adults in 2000, about 34.5 million are Heritage Tourism Enthusiasts (17%). Of these, almost 25% claim to have taken a leisure trip within Canada during the past two years. Thus, Canada's market for the heritage segment is approximately 8.3 million American adults.

Canada draws a disproportionately high number of its Heritage Tourism Enthusiasts from the border states – 18% of the total U.S. population lives in states on the Canada/U.S. border while 28% of Heritage Tourism Enthusiasts who come to Canada do so. Attracting these tourists from the long haul U.S. markets poses a greater challenge – 54% of Americans live in Tier III states but only 40% of Heritage Tourism Enthusiasts who come to Canada live in this southern band of states. At the same time, a higher proportion of Heritage tourists come from long haul markets (40%) than do travellers to Canada as a whole (35%), suggesting particular success in attracting these potentially high spending travellers with heritage products.

Activities Engaged in by more than 30 per cent of Heritage Tourism Enthusiasts	
General history museums (81%)	Science & tech museums (64%)
Farmers' fairs or markets (68%)	Historic sites (63%)
Local festivals or fairs (67%)	Historical replicas of cities (55%)
Activities Engaged in by 10 per cent to 30 per cent of Heritage Tourism Enthusiasts	
Children's museums (28%)	Aboriginal attractions (28%)
Aboriginal cultural experiences (23%)	French Canadian cultural experiences (26%)
Western theme events (21%)	Pick-your-own farms/harvesting (25%)
Carnivals (15%)	Pow Wows/Aboriginal celebrations (12%)

Scenic Tour Seekers

The tourism products and experiences in the region are also of interest to the market segment known as Scenic Tour Seekers. This segment represents 8.9 % of Canadian travellers and 9.5 % of American travellers. Their levels of education and household income are lower than those of other touring travellers. Mature Mainstream Singles and Senior Singles are especially over-represented within this segment.

Percent of total population	7.9 % [Canada]; 8.4 % [US]
Percent of travellers	8.9 % [Canada]; 9.5 % [US]
Size of segment	1,546,300 [Canada]; 14,407,400 [US]
Average age/dominant age range	47.8 years old; 36 Plus (68.5 %)
Dominant life cycle segments	Senior Singles 10.1 % Senior Couples 10.2 % Mature Couples 16.7 %
Education	45.9 % University/College; 57.1 % Advanced Degrees
Employment status	52.7 % Employed; 25.5 % Retired; 10.0 % Self-employed

Scenic Tour Seekers travel less often than the average traveller, and are less likely to travel domestically. The percentage of American Scenic Tour Seekers with plans to visit Canada is comparable to the average American traveller.

Scenic Tour Seekers are most likely to seek out exploratory vacation experiences (especially visiting museums, art galleries and historical sites), and are unlikely to use their vacations to seek out romance and relaxation. Guided tours of a city or the countryside are the most preferred touring activities. Scenic Tour Seekers are less likely to participate in outdoor activities, and show average participation levels in most culture and entertainment activities. They are also more likely to use a motorhome or travel trailer, suggesting that “scenic touring” is the main travel pursuit of this segment.

While Essex County offers a number of cultural and heritage attractions of interest to the Heritage Tourism Enthusiast or the Scenic Tour Seeker, it lacks the critical mass to be perceived by both the Canadian and US markets as a competitive destination for Heritage tourism. The attractions are, for the most part, small in scale with relatively short average length of stay. One notable exception would be the collection of attractions known as Ontario’s Black Heritage Route, which includes attractions related to the Underground Railroad. The John Freeman Walls Historic Site and Underground Railroad Museum is featured on the Black Heritage Route, along with other Essex County attractions such as Uncle Tom’s Cabin in Dresden and the North American Black Historical Museum and Fort Malden National Historic Site in Amherstburg.

While Black Heritage is arguably the region’s most significant cultural and heritage asset, francophone culture is an integral part of the history of Essex County, and it is estimated that 4% of the population still retains strong francophone roots.

There are a number of challenges that must be addressed in order to increase visitation from Heritage Enthusiasts, and most are directly related to funding. Many of the attractions are seasonal and all operate with very limited marketing resources. The attractions are modest in scale, with an average length of stay typically under two hours. The programming and content limit the opportunity for repeat visitation.

The largest challenge facing cultural and heritage attraction in the Town of Lakeshore is that similar attractions are available elsewhere in the region, often more competitively positioned i.e. they enjoy a higher profile, or benefit from greater critical mass. With many of the more noteworthy Black Heritage and French Canadian cultural attractions located outside of the Town of Lakeshore, it will require considerable effort and investment to build tourism traffic to the Town based on its heritage attractions.

3.1.3 FESTIVALS, EVENTS AND TOURNAMENTS AS A DEVELOPMENT OPPORTUNITY

Festivals and special events are an increasingly important tourism demand generator in many communities. Over 3,000 festivals, events and fairs take place in Ontario every year. Ontario promotes these festivals and events on the www.ontariotravel.net consumer web site using the following major categories:

- Celebrate the Seasons
- Celebrate the Arts
- Celebrate the Sporting Life
- Celebrate Heritage and Culture
- Summer Festivals

Of relevance to this Tourism Development Master Plan is the impact of out-of-town visitors to festivals and events, the higher level of spending of participants (e.g. exhibitors, performers) over attendees and higher spending within certain age groups.

Non-local Visitor Profile	**Average Expenditure per Person**
Non-local, Ontario visitors within 80 kilometers of event	$73
Non-local, Ontario visitors 80 km or more from event	$196
Attendee or spectator	$133
Participant or with participant	$217
Under 25 years old	$175
25-34 years and 45 – 54 years old	$135
35-44 years	$128
55- 64 years	$156
65 years and over	$167
Source: 2003 Festivals and Events Ontario Economic Impact Survey, Enigma Research 2004	

As these statistics clearly indicate, events that encourage a large number of participants and those that capture visitors from outside the “daytrip” market have the greatest potential economic impact.

Many festivals and special events are built around a generic theme – jazz and comedy festivals are commonplace. However, many of the most enduring and successful events are built around themes that are unique to the geography, heritage and culture of the region. Kitchener's Oktoberfest, Kapuskasing's Lumberjack Heritage Festival and the Elmira Maple Syrup Festival are three such events, which draw as many as 50,000 people per day.

Festivals and events provide an opportunity to celebrate local heritage and culture, build community pride, support volunteerism and philanthropic causes, and generate traffic for local business. While the majority of visitation for festivals in Ontario is from the local and day-trip market, they remain an important element in a municipal tourism strategy by encouraging residents to become a "tourist in your own town", fostering a greater awareness of the cultural, heritage and recreation opportunities available in the community. Festivals also help to retain discretionary entertainment dollars that might otherwise be spent outside of the community.

Lakeview Park and the Belle River Marina are important elements of the Town's tourism infrastructure, supporting the sports fishery and other water-based recreation. The ability to offer a waterfront venue for festivals, events and other tourism and recreation activities presents an opportunity for the Town of Lakeshore that many municipalities cannot match. The tourism development strategy outlined later in this report contains recommendations to capitalize on this opportunity.

Profile of the Festival Tourism Enthusiast

In 2000, approximately 1.7 million adult Canadians who took a leisure trip within Canada over a two-year period fell within the Festival Tourism Enthusiast market. This market share represents approximately 7% of Canada's 23.3 million adults. The segment includes 675,000 tourists who are Performing Arts Festival Tourism Enthusiasts and just under one-half million who are Themed Community Festival Tourism Enthusiasts (497,000). The remaining 483,000 tourists go to a mix of performing arts and themed community festivals, but do not show a special preference for one type of festival or event over the other.

For the 30% who have gone to themed community festivals while on a recent leisure trip, local fairs and festivals are especially popular, with over 90% attending such a festival on a recent overnight leisure trip.

Festival Tourism Enthusiasts are more likely to be women (55%) than they are to be men (45%). They span the age spectrum with a concentration among younger Canadians – 40% are between the ages of 18 and 34 years, with an average age of close to 41 years. Festival Tourism Enthusiasts are, therefore, somewhat younger (average age 38.5 years) than the typical domestic tourist in Canada who has an average age of about 43 years. Festival Tourism Enthusiasts span the income and education spectrums. They are less likely to fall into the lowest education group and are more likely to be university graduates than are Canadian travellers as a whole. Despite their relatively high levels of education, these enthusiasts do not have especially high household incomes, possibly because they have not reached their full earning potential as a result of their relative youthfulness.

3.2 Tourism Infrastructure and Services

Tourism infrastructure and services include businesses supporting or serving visitors to the community, in particular accommodation (hotels, motels, bed and breakfasts, campgrounds), retail and food and beverage outlets. Tourism infrastructure also includes Visitor Information Services such as wayfinding/signage, Visitor Information Centres, websites and call centres.

Transient accommodation is generally categorized as “fixed roof” which includes hotels, motels, bed & breakfasts, lodges, resorts; or campgrounds which include both traditional and RV camping facilities. A strong tourist destination must offer a variety of accommodation options across a range of type, quality, and price. The accommodation must be conveniently located relative to tourism demand generators, and should include brands that are well recognized within the desired target markets.

The availability of transient accommodation is generally considered a pre-requisite for tourism development. Without adequate accommodation, visitation is limited to the following segments:

- day trip market – those residing within 80 kilometres of the destination
- side-trip market – tourists that are staying overnight in another destination, and travel to the area to visit a local attraction
- VFR market – those visiting friends and relatives.

The economic impact of these segments is quite limited in comparison to the overnight visitors using commercial accommodation.

Local attractions and others serving the tourism market (such as restaurants and retailers) are reluctant to advertise outside of the local or regional market unless cooperative marketing programs can be developed with local accommodation partners. Thus, the availability of quality transient accommodation directly impacts the ability of the region to develop and implement a destination marketing plan.

The Town of Lakeshore has a modest transient accommodation inventory. With just four limited service motels and no significant banquet or conference facilities, the ability to attract group business (e.g. bus tours, conventions, sports tournaments) is very constrained. The majority of demand for these properties comes from commercial business travelers and independent tourists.

It would appear that very little marketing is done to attract leisure travelers to accommodation properties in the Town of Lakeshore, particularly by the local motels. We note that only two of the local motels are members of the BIA, and that none of the local motels are listed in the Convention & Visitors Bureau of Windsor, Essex County and Pelee Island.

The Town of Lakeshore has a reasonable range of retail, food and beverage and other businesses to support visitors to the region, but the product offerings and services are not sufficiently unique to be a draw to the area or extend the length of stay.

In terms of Visitor Information Services, the Town offers very little in the way of electronic or print information, relying on the Windsor & Essex County destination marketing organization to promote the Town and its attractions.

In terms of tourism infrastructure, the major challenge facing the Town of Lakeshore as it seeks to develop its tourism industry is the limited inventory of transient accommodation. According to Smith Travel Research, commercial accommodation operations in the region achieved an annual occupancy rate of 52.3% in 2006, down from 53.3% in 2005. The performance of the automotive sector, reduced US visitation and increased competition from American casinos have contributed to the negative trend reported in recent years. These adverse conditions have had a more pronounced impact on the major city-centre hotels in downtown Windsor, that cater more to conventions, casino visitors and other leisure market segments. Suburban hotels, that cater primarily to commercial travel, “rubber tire” leisure traffic, sports tournaments and other market segments, have not been as adversely affected and are generally achieving occupancy levels above the regional average. The break-even point for profitable hotel operation is generally regarded as 65% annual occupancy or better. Given the current level of demand, any new lodging development in the region will likely be in the suburban markets, and will be of the limited service variety such as Hilton Garden Inns or Holiday Inn Express. This type of development, while not reversing the negative trends noted earlier, will provide much needed capacity to the suburban markets.

3.3 Tourism Leadership and Management

There are a number of organizations at the local, provincial and national level that have, or could have, an impact on tourism in the Town of Lakeshore. They include:

***Canadian Tourism Commission* –** a federal crown corporation tasked with increasing awareness of Canada as a premier four season vacation destination. Its marketing activities are principally focused on the international visitor, although some efforts are aimed at motivating travel in Canada by Canadians. The CTC is funded by the federal government, by in-kind contributions from tourism operators and other stakeholders, and by partner buy-in to cooperative marketing programs.

***Ontario Tourism Marketing Partnership Corporation* –** the provincial agency responsible for promoting Ontario as a vacation destination. Its marketing activities are focused on visitors from outside the province, with particular emphasis on the US Border states. A significant level of resources are directed at motivating awareness and travel within the province by residents. The OTMPC is funded by the provincial government, by in-kind contributions from tourism operators and other stakeholders, and by partner buy-in to cooperative marketing programs.

***Visitor and Convention Bureau of Windsor, Essex County and Pelee Island* –** Destination Marketing Organization (DMO) responsible for marketing Windsor, Essex County and Pelee Island tourism attractions, services and events. A member-based organization, it is funded by grants from the City of Windsor and Essex County, by membership fees, in-kind contributions from tourism operators and other stakeholders, and by partner buy-in to cooperative marketing programs.

***Belle River BIA* -** local association of merchants and other businesses in the Town of Lakeshore, organized under a Business Improvement Area.

***Trade Associations* –** various trade associations support the industry development and advocacy goals of those involved in various sectors directly or indirectly related to tourism. These include the Ontario Restaurant, Motel and Hotel Association; charter boats, the Ontario Marina Operators Association, the Ontario Sports Fishing Guide Association, Resorts Ontario and the Ontario Accommodation Association.

***Town of Lakeshore* –** municipal government for the Town of Lakeshore. Through its Economic Development department it is actively involved in promoting the development of tourism related businesses. The Town also influences the direction and pace of tourism development through its other services, including planning, transportation, parks, recreation and culture.

The challenge facing the tourism sector in Lakeshore is that tourism is not the primary focus of those organizations and businesses involved directly or indirectly in serving the needs of visitors. Marina operators, golf courses, heritage attractions, retailers and other businesses that support tourists derive only a modest share of their total revenue from tourists. Organizations such as the Belle River BIA or the Town's Economic Development department have tourism as one of several objectives, but do not have significant resources aimed exclusively at tourism development.

4.0 TOURISM DEVELOPMENT STRATEGY

Major "built form" tourism attractions in Ontario have, with a few notable exceptions, been developed with public funds, and require ongoing financial support from the public sector for their operation. There has been a notable lack of attraction development in this province for the past twenty years, with most new attractions linked to provincial and federal infrastructure programs. Unfortunately, virtually all of these funding initiatives have been omnibus programs that fund everything from sewers to hospitals, not a dedicated tourism, culture and heritage program. With municipalities struggling to provide essential infrastructure, tourism projects seldom make the cut for public funding from these omnibus programs. The likelihood of a major publicly funded tourism project in Lakeshore or the surrounding region is very limited in the foreseeable future.

With limited prospects for the development of new tourist attractions or transient accommodation facilities in the foreseeable future, the Town of Lakeshore must capitalize on its existing tourism assets and increase their market appeal and draw by:

1. Enhancing the quality of programs and content for cultural and heritage assets;
2. Packaging and clustering tourism operations to create a stronger sense of critical mass
3. Establishing Lakeview Park as the focal point for tourism in the Town, for festivals and events, and for tourism related services and infrastructure (e.g. Visitor Information Centre, bicycle rentals, trip itineraries);
4. Improving awareness and increasing the reach and frequency of marketing initiatives;
5. Supporting industry efforts to ensure equitable and sustainable management practices for the Lake St. Clair sports fishery.
6. Enhancing the quality of tourism infrastructure and services.
7. Providing effective leadership to coordinate and integrate the activities of those organizations directly or indirectly involved in tourism development and operations.

To do so will require both leadership and financial support from the municipality. As noted earlier, tourism is not a high priority for many organizations in the area, and limited resources are available for tourism initiatives. Tourism attractions and events have limited marketing and management resources, and most of their efforts are directed to day-to-day operations. The marketing funds available are typically directed at the day-trip market, generating relatively modest economic impact for other sectors of the Town's economy.

4.1 Tourism Vision for the Town of Lakeshore

Recommendation – Tourism Vision Statement

The Town of Lakeshore is recognized by its citizens and visitors alike for unique tourism experiences, focused on its natural, cultural and heritage resources.

The first element of the Vision underscores the importance of local support for those products and services of interest to visitors. As noted earlier, most businesses, cultural and heritage attractions derived the majority of their patronage from the local or regional market. Continued support of these products and services by the local community is a prerequisite to a successful tourism development strategy.

Equally important is the need for residents to understand how tourism fits into the Town's economic development strategy, to ensure adequate support for the public resources required to implement this tourism development strategy.

The second element of the Vision underscores the Core and Supporting Attractions for the Town – its waterfront and water-based activities, along with the cultural and heritage assets found within the region.

This Vision provides context for the Objectives and Strategies that will guide the Town's tourism development efforts over the next decade.

4.2 Tourism Objectives and Strategies

We have organized our Objectives and Strategies into three categories:

1. Tourism Product Development
2. Tourism Infrastructure and Services
3. Leadership and Management

4.2.1 TOURISM PRODUCT DEVELOPMENT

Recommendation: Tourism Product Development Goals

Goal 1: Enhance the quality of existing products to increase their market appeal and capture rate.

The ability of the Town of Lakeshore to further develop its tourism sector is directly related to the quality of tourism products and experiences it can offer. Existing tourism product is limited both in quantity and quality. The first goal of the Tourism Development Strategy is to work with existing operators in the priority segments (sports fishing, culture & heritage, festivals & events) to enhance the scope and quality of their product offering.

Recommendation: Tourism Product Development Strategies

The following strategies are directed towards the realization of Goal 1.

1.1 From the existing tourism product inventory, identify priority products – market-ready products, or those with potential to become market ready, that fit within the identified priority markets of sports fishing, culture, heritage, festivals & events.

1.2 Working with the selected operators, develop product enhancement strategies to improve market ready status and market appeal. Product enhancement strategies should address the full scope of operation including physical plant, program and content, management and marketing. Opportunities for consideration include coordinating the efforts of local museums and archives to provide more cost effective, focused, professional activities through exploring joint and coordinated displays, exhibits, activities, staffing, funding and marketing (e.g. one brochure for all, a combined ticket price, etc.)

1.3 Focus tourism activities on Lakeview Park. For example, provide economic incentives to community groups and others interested in development festivals and events; provide facilities for operators interested in offering visitor services such as bicycle rentals, kayak rentals; enhance visitor information services such as wayfinding and literature distribution.

1.4 Identify the funding and other resources required to implement the product enhancement strategies, and what will be required to secure such funding and resources.

Recommendation: Tourism Product Development Goals

Goal 2: Develop new, market ready tourism product targeted to the priority market segments.

The second goal of the Tourism Development Strategy is to work with existing operators and other stakeholders in the priority segments (sports fishing, culture & heritage, festivals & events) to expand the number of tourism products available. This will provide greater opportunity for touring itineraries, extend the length of stay for existing visitors, and help to create the critical mass required to be a successful tourism destination.

Recommendation: Tourism Product Development Strategies

The following strategies are directed towards the realization of Goal 2.

2.1 Identify product development opportunities from amongst the existing priority market segments, as well as opportunities in emerging or niche markets such as agri-tourism and eco-tourism. Particular emphasis should be directed to the creation of a new "signature event" tied to the priority market segments, and staged at Lakeview Park.

2.2 Identify potential developer partners from amongst current tourism stakeholders and other related stakeholder groups (e.g. cultural and heritage societies, community service organizations).

2.3 Working with the selected development partners and stakeholders, prepare product development strategies for new market ready tourism products.

2.4 Identify the funding and other resources required to implement the product development strategies, and what will be required to secure such funding and resources.

Recommendation: Tourism Product Development Goals

Goal 3: Increase market draw and length of stay through new tourism packages.

While tourism "product" is often thought of in terms of attractions or events, the packaging of existing tourism experiences is another form of product development. The third goal of the Tourism Development Strategy relates to the creation of critical mass and clusters of complementary attractions to expand the opportunity for touring itineraries, attract new visitors and extend the length of stay for existing visitors.

Recommendation: Tourism Product Development Strategies

The following strategies are directed towards the realization of Goal 3.

3.1 Working with operators in the priority market segments (including where appropriate, operators from neighbouring communities), as well as complementary service providers (accommodation, retail, dining, transportation), develop product clusters, product itineraries and product packages aimed at the Hunting & Fishing Enthusiast, Heritage Enthusiast and Scenic Tour Seekers. Opportunities for consideration include a series of guided and self-guided packages and itineraries. Use Lakeview Park as the focal point for guided and self-guiding itineraries.

3.2 Working with existing destination marketing organizations such as the Visitor and Convention Bureau of Windsor, Essex County and Pelee Island, identify promotion and distribution strategies for new packages and itineraries.

3.3 Identify the funding and other resources required to implement the product development strategies, and what will be required to secure such funding and resources.

Recommendation: Tourism Product Development Goals

Goal 4: Provide economic incentives for private sector investment in new or enhanced tourism product.

Access to capital is an ongoing problem for tourism operators. The Town can accelerate private sector investment in existing or new tourism products (including both "bricks and mortar" and other tourism experiences such as festivals), by providing economic incentives.

Recommendation: Tourism Product Development Strategies

The following strategies are directed towards the realization of Goal 4.

4.1 Establish a Lakeshore Tourism Development Opportunity Fund to support the implementation of approved tourism development strategies.

4.2 Establish eligibility criteria giving priority to proposals that:

- provide matching funds;
- bring together multiple operators;
- have sustainable development and operational practices;
- establish Lakeview Park as the focal point for the Town's tourism activities; and support the approved tourism development strategies.

Recommendation: Tourism Product Development Goals

Goal 5: Enhance the quality and sustainability of the Lake St. Clair sports fishery.

As noted, sports fishing opportunities on Lake St. Clair constitute one of the Core Attractions for the Town of Lakeshore. As such, the sustainability of a quality fishery is of vital importance to this strategy. While fisheries management practices fall outside the municipal jurisdiction, the Town has a vested interest in the sustainability of the fishery and should lend its support to efforts in this direction.

Recommendation: Tourism Product Development Strategies

The following strategies are directed towards the realization of Goal 5.

5.1 Working with marina operators, charter boat operators and other knowledgeable stakeholders, identify the key issues affecting the sustainability of the Lake St. Clair sports fishery.

5.2 Identify the trade industry groups and other organizations tasked with advocacy on behalf of the stakeholders, and assess the advocacy platforms and recommendations of such groups.

5.3	Support and help to advance those advocacy initiatives consistent with the Town's overall strategic plan.

4.2.2 TOURISM INFRASTRUCTURE & SERVICES

Recommendation: Tourism Infrastructure & Services Goals

Goal 1: Increase the quantity and quality of transient accommodation available to visitors.

Recommendation: Tourism Infrastructure & Services Strategies

The following strategies are directed towards the realization of Goal 1.

1.1	Encourage the development of further bed & breakfast accommodation to supplement the existing inventory of commercial accommodation.
1.2	Continue to pursue the development of a new, nationally branded three or four star hotel.
1.3	Identify the funding and other resources required to implement the product enhancement strategies, and what will be required to secure such funding and resources.

Recommendation: Tourism Infrastructure & Services Goals

Goal 2: Improve the quality of Visitor Information Services.

Recommendation: Tourism Infrastructure & Services Strategies

The following strategies are directed towards the realization of Goal 2.

2.1 Enhance wayfinding systems for visitors. Specifically:

- Identify current signage for tourist attractions and services
- Identify needs and opportunities for new or enhanced signage and wayfinding, including opportunities to identify newly developed itineraries and tours. Lakeview Park should be positioned as the "hub" for wayfinding and visitor information services.

	• Develop a common wayfinding package with standard specifications for graphics, word marks, design and colour.
2.2	Develop a tourism-focused website, housed on the Town's current website.
2.3	Prepare a service delivery strategy and business case for the operation of a seasonal Visitor Information Centre in Lakeview Park.
2.4	Identify the funding and other resources required to implement the Visitor Information Services, and what will be required to secure such funding and resources.

4.2.3 TOURISM LEADERSHIP AND MANAGEMENT

Recommendation: Tourism Leadership and Management

Goal 1: Enhance the leadership and coordination of tourism related activities.

In order for the Town of Lakeshore to capitalize on its tourism potential, it must work with tourism sector stakeholders to create a focal point for tourism development and marketing activities, and put in place the organizational capacity to implement a coordinated tourism development strategy.

Recommendation: Tourism Leadership and Management

The following strategies are directed towards the realization of Goal 1.

1.1	Establish an organization with the mandate to co-ordinate a program of tourism management including, product development, visitor information services, itinerary and package development and destination marketing.
1.2	Retain a tourism program coordinator within the Economic Development department to oversee the approved tourism development and marketing initiatives.
1.3	Develop and implement a community awareness program to create a better understanding of the importance of tourism for the Town. Programs such as "Be a tourist in your home town" reinforce the awareness of the tourism product, underscore the need for a visitor-focused service culture, and help generate additional demand from the VFR market.

Recommendation: Tourism Leadership and Management

Goal 2: Develop the research tools and data required to guide tourism development and destination marketing.

Considerable effort and resources will be required to implement the development and marketing strategies outlined herein. The effectiveness of these initiatives will be greatly enhanced if they are based on a solid understanding of market conditions, the competitive climate, and other factors impacting tourism activity.

Recommendation: Tourism Leadership and Management

The following strategies are directed towards the realization of Goal 2.

2.1	Develop procedures for the regular collection and analysis of tourism performance indicators, including secondary data sources (e.g. Ontario Travel Monitor) as well as local market indicators (attractions and event attendance, accommodation occupancy levels etc.).
2.2	Develop and implement a program of primary consumer market research in the identified target markets, to gain a better understanding of the current level of market awareness, travel intentions, buying behaviour, media preferences etc.

Recommendation: Tourism Leadership and Management

Goal 3: Increase the awareness of the Town of Lakeshore as a tourism destination.

Increasing market awareness of the tourism opportunities available in and around the Town of Lakeshore is critical. Without additional visitor traffic, the product enhancement and new product developments that are the focus of this strategy will not be sustainable.

Recommendation: Tourism Leadership and Management

The following strategies are directed towards the realization of Goal 3.

3.1	Develop and implement a destination marketing plan for the Town of Lakeshore.