



# Hamilton Tourism Strategy

## 2015 – 2020

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And in collaboration with the **Tourism & Culture Division, City of Hamilton**

JANUARY 2015

# Executive Summary

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This Strategy sets out the strategic direction for the tourism industry in Hamilton. It has been developed to support *The City of Hamilton Strategic Plan 2012-2015*; and is in alignment with key municipal policies relating to land-use planning, economic development, culture and transportation.

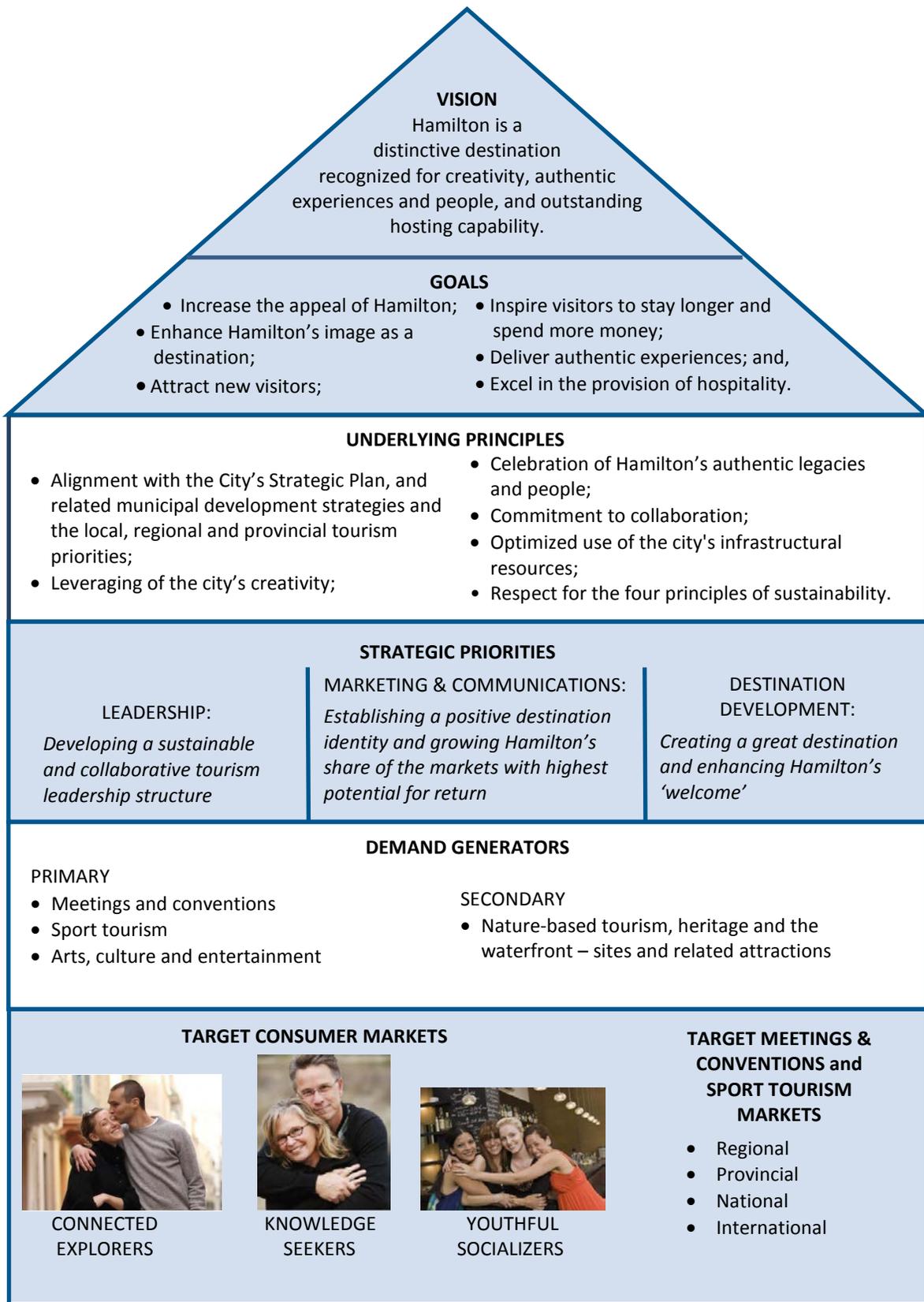
Hamilton is a dynamic city with unique geographic and cultural attributes. Tourism is becoming increasingly important to the economic health of the city and is a platform for building further economic growth. The city attracts over 4.5 million person visits annually largely from near-in markets, and these visitors spend an estimated \$359.5 million per year. In 2014 the City of Hamilton's Tourism and Culture Division undertook a strategic planning process based on extensive consultation with industry and City staff. The intent of the process and this Strategy is to establish a strategic approach to the growth and development of tourism – one that is cohesive and partnership-based, designed to enhance the image and competitiveness of Hamilton as a visitor destination, grow visitation, meet visitor expectations, and generate economic and social benefits for the whole community.

The planning process involved an in-depth assessment of current trends and factors influencing tourism and the status of the industry today. A **comprehensive SWOT analysis** looking at the industry and the destination experience from a traveller-centric perspective identified ten issues and opportunities that need to be either addressed or leveraged:

- The negative image of Hamilton as a visitor destination.
- The low profitability of the commercial hotel sector.
- The reduction in funding for destination development and marketing.
- The need for alignment of all marketing and communications relating to tourism in Hamilton.
- A tendency of the industry to function in silos.
- The absence of a strong Hamilton narrative that clearly defines the essence of the Hamilton experience.
- The geography of Hamilton and its related internal connectivity challenges.
- Hamilton's unique geographic setting and historical context.
- The importance of understanding what makes, or could make, Hamilton distinctive for its ideal guests.
- The positive symbiosis between tourism and culture.

A **strategy framework** emerged from the planning consultations with a collective vision, set of goals, and underlying principles; the identification of primary and supporting demand generators and key markets; and, the establishment of three strategic priorities relating to leadership, marketing and communications, and destination development.

**THE STRATEGY FRAMEWORK**



### **Strategic Priority 1: Leadership – *developing a sustainable and collaborative leadership structure***

Effective implementation of this Strategy will require strong leadership that brings together the public and private sectors at a senior level to facilitate the growth of tourism, and the identification of additional funding for business development and marketing. The leadership structure for the industry has been strengthened and includes the following existing and proposed new entities:

- **The Tourism and Culture Division (T&CD)** within the City of Hamilton – responsible for the destination management organization (DMO) role, and is the lead partner in overseeing and supporting the implementation of this Strategy;
- The new **Hamilton Tourism Partnership (HTP)** – to be composed of industry leaders who will work in collaboration with the City to drive tourism business in the short and long term;
- The new **Strategy Implementation Group (SIG)** – to assume a longer-term focus with responsibility for advising T&CD staff on strategic direction and the implementation of tourism priorities identified in this Strategy;
- The existing **Tourism Advisory Committee (TAC)** responsible for advising Council on tourism matters; and
- **Regional Tourism Organization 3 (RTO 3)** – where stronger alignment and working relations are anticipated between this regional organization, T&CD and industry stakeholders.

The Strategy recommends pursuing a **Destination Management Program (DMP)** under the leadership of the Hamilton Tourism Partnership as a means of establishing a supplementary funding mechanism for industry-led investment in tourism.

### **Strategic Priority 2: Marketing and Communications – *Establishing a positive destination identity and growing Hamilton's share of the markets with highest potential for return***

Strengthening the market mix for Hamilton and the tourism economy involves a critical need to increase the proportion of overnight visitors staying in commercial accommodation. By focusing on Hamilton's identified primary demand generators, the broad priority target markets in order of significance are:

1. Meetings and conventions (M&C);
2. Sport tourism; and,
3. Leisure with an emphasis on consumer segments interested in arts, culture and entertainment.

A targeted approach to marketing must also address the need to generate business during the city's off peak periods. The Strategy recommends developing and maintaining an Advanced Booking Calendar that will be used by the industry to track potential and actual scheduling of events, festivals, M&C business, and sports related tournaments and activities for a forward-looking period of at least 3 years.

T&CD will take the lead in the marketing and sales activities associated with all target markets. With the **M&C market and the sport tourism market**, T&CD will work closely with the newly established HTP. The key collaborative strategies that will grow both M&C and sport tourism include focusing on city-wide bids and larger sport tourism events that attract both spectators and competitors; establishing a Hamilton Ambassador Program; developing effective tracking mechanisms and systems to ensure a high quality of experience for visitors; and, building awareness of Hamilton as a preferred M&C and sport tourism events destination. An essential factor in growing these market segments will be the

establishment of a Tourism Business Development Fund. This will require the successful implementation of the DMP.

Hamilton's core **leisure market** lies largely within the Golden Horseshoe (Toronto to Niagara). Demand is primarily for day visits, with 'visiting friends and relatives' (VFR) being a key motivating factor in generating demand overall. The strategies recommended for this market are based on strategic segmentation, an enhanced use of digital marketing, and close collaboration with RTO 3. Three of the provincial segments identified through the Ontario Tourism Marketing Partnership Corporation (OTMPC) market segmentation research are identified as the target consumer markets: 'Connected Explorers', 'Knowledge Seekers' and 'Youthful Socializers'. Creating a stronger online presence and increasing the use of digital channels for information distribution will strengthen the positioning of Hamilton and its sense of place as a destination, and will increase stakeholders' ability to leverage RTO 3's regional marketing activities.

### **Strategic Priority 3: Destination Development – *creating a great destination and enhancing Hamilton's 'welcome'***

In assessing Hamilton as a destination, it is clear that the city has an array of nature-based sites and attractions, heritage attractions, distinctive landscapes associated with the Niagara Escarpment, and a waterfront that is undergoing redevelopment – all of which contribute to the destination experience but are not significant demand generators. However, the arts, culture and entertainment as a product cluster, represents an opportunity to truly differentiate Hamilton as a destination in Southern Ontario. The Strategy demonstrates that focusing on this cluster and developing innovative visitor experiences will not only strengthen the positioning of Hamilton as a *distinctive destination recognized for creativity*, but will also enable the development of linkages with other existing product and will elevate the significance of many of these sites and attractions.

The objective of destination development is to lengthen visitors' stay, engage them in tourism related activities, and enjoy the city's urban and rural areas. The proposed development initiatives leverage Hamilton's distinctive attributes and existing municipal and city-wide strategies, while responding to a growing demand for engaging experiences characterized by authenticity and creativity.

The proposed initiatives are as follows:

1. **The James Street Corridor Pilot Project** – inspired by the success of the *Dubline* initiative in Dublin, Ireland, the lake to escarpment James Street corridor is suggested as a pilot to implement a multi-faceted visitor experience that offers the potential to tell the Hamilton 'story'. This will require a concept plan to ensure the coordinated development, management and marketing of the Corridor Concept and the integration of a variety of current City initiatives.
2. **The waterfront** – moving forward with existing City strategies to create a stronger micro-destination.
3. **Leveraging the strengths of the region** through developing new and enhancing existing nature/trail-based activities and agri-tourism activities, including raising the profile of cycling and local foods.
4. Using **festivals and events** to grow overnight stays and strengthen Hamilton's position in niche areas.
5. **Enabling growth** through maintaining a high quality vibrant and welcoming destination; strengthening the role of new technologies in destination management and the delivery of visitor experiences; and improving access to Hamilton and connectivity within the Hamilton area.

# 1. Introduction

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This Strategy sets out the strategic direction for the tourism industry in Hamilton. It has been developed to support *The City of Hamilton Strategic Plan 2012-2015*; and is in alignment with key municipal policies relating to land-use planning, economic development, culture and transportation.

## The importance of tourism to Hamilton

Ontario's tourism industry, at \$23.6 billion, contributes more to the province's economy than the mining and supply industry (\$5.6 billion), pharmaceuticals and biotechnology (\$5.4 billion), advanced medical technology (\$3.6 billion) and aerospace (\$6.5 billion) sectors combined<sup>1</sup>. Developing the sector and supporting its growth contributes to the viability and diversity of local economies and to the creation of employment opportunities.

In Hamilton tourism is becoming increasingly important to the economic health of the city and is a platform for building further economic growth. Its role in job creation is significant at a time when unemployment has risen to 7.2%<sup>2</sup>. Today approximately 2,300 residents are employed in the hospitality sector. The city attracts over 4.5 million person visits annually and these visitors spend an estimated \$359.5 million per year<sup>3 & 4</sup>. Tourism operators and small businesses throughout Hamilton benefit directly from visitor expenditure, and the economy overall is further stimulated from the ripple effect of new money entering the community.

In addition to the economic benefits, tourism provides an opportunity to share the city's distinctive cultural and natural assets with visitors<sup>5</sup> and to strengthen the economic and social value of these assets. Hamilton's location by the Niagara Escarpment and Lake Ontario offers a unique setting and a wide array of nature and water-based activities, while the community's rich heritage and burgeoning cultural scene are increasingly regarded as key elements of the Hamilton visitor experience. Developing and promoting these assets not only increases the competitiveness of Hamilton as a visitor destination, but it also contributes to the quality of life and well-being of local residents<sup>6</sup>. Indeed, the value of tourism to Hamilton extends well beyond these benefits, as the industry has the potential to change traditional perceptions of the city and its industrial legacy. A strategic approach to developing unique visitor experiences and repositioning the city will play a significant role in raising the profile of Hamilton

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<sup>1</sup> Tourism Industry Association of Ontario, April 2013, *Tourism = Economic Growth & Jobs for Ontario*.

<sup>2</sup> Statistics Canada reported an unemployment rate of 7.2% for Hamilton in June 2014 – an increase of 1.4 points over June 2013.

<sup>3</sup> City of Hamilton Tourism Strategy *Background Paper*, June 2014 – based on the analysis of Statistics Canada microdata which contain anonymised data collected in the Travel Survey of Residents of Canada and the International Travel Survey. All computations on the microdata were prepared by the Ontario Ministry of Tourism and Culture.

<sup>4</sup> At a regional level, tourism contributes \$261 million in wages, \$341 million in GDP, with a total economic output of \$761 million. Source: InterVistas, 2014, *John C. Munro Hamilton International Airport – 2013 Economic Impact Study* – statistics used in this report relate to the RTO 3 region for 2011 and the analysis is based on data from the same source as referenced in Footnote 3.

<sup>5</sup> Culture is seen as a cornerstone of Hamilton's identity and 82% of local residents believe that it attracts tourists and visitors to the city (City of Hamilton, 2013, *Cultural Plan 2013: Transforming Hamilton Through Culture*).

<sup>6</sup> "The City acknowledges that tourism brings concrete economic benefits to the City of Hamilton and that a strong tourism industry in the City also contributes leisure, entertainment, cultural, recreational, and hospitality services for residents and helps attract new residents, businesses and industry to relocate to the City of Hamilton." (Section 3.1.8, *Urban Hamilton Official Plan*).

both as a visitor destination and as *a prosperous and healthy community...a great place to live, work, play and learn*<sup>7</sup>.

## Planning for sustainable tourism growth

Realizing the benefits of tourism requires a clear ‘road-map’ for all tourism stakeholders – the City of Hamilton, tourism operators, community organizations, institutions and other businesses who play a role in shaping the visitor experience. The industry, by its nature, is not one readily identifiable sector but a ‘sector of sectors’. By collectively pursuing a shared vision, common goals and objectives, rather than an ad hoc approach, the visitor economy will undergo a greater level of strategic growth.

In early 2014 the City of Hamilton initiated a planning process for the development of the Tourism Strategy. For tourism to become a stronger economic driver and a tool for community development, the City recognized the recent positive changes and their potential role to stimulate new growth. These include:

- A renaissance of the arts within Hamilton and the potential to enhance its appeal for the visitor market.
- The city’s notable heritage (architecture, neighbourhoods and historical attractions) and the tourism value of preserving these assets.
- The substantial investment that has been made in developing sport and event-related infrastructure, and the benefits to be gained through utilizing these resources effectively to grow tourism and to gain a greater level of return on investment.
- The unique natural attributes associated with Hamilton’s escarpment features and waterscapes, and their value in creating a distinctive setting for visitors and new experiences.
- The recent private sector investment in the development of 600 new hotel rooms in the downtown core and the importance of working with partners to increase overnight stays and occupancy levels.
- The opportunity to leverage the strengths of the region through supporting the further growth of niche sectors such as ecotourism, soft adventure (e.g. hiking, bird-watching), cycling, agri-tourism and culinary tourism.

In addition to these factors, tourism has undergone substantial restructuring at the regional and local levels with the implementation of a new provincial regional tourism model<sup>8</sup>, the dissolution of Tourism Hamilton and the recent transfer of responsibility for local tourism to the new Tourism and Culture Division (T&CD), under the City’s Planning and Economic Development (P&ED) Department. In the context of these changes, the consultation process supported a collective dialogue to explore effective ways of working collaboratively and to identify the municipal role in tourism development.

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<sup>7</sup> *The City of Hamilton Strategic Plan 2012-2015* – Strategic Priority # 1.

<sup>8</sup> This resulted in the establishment of RTO 3 – the Hamilton Halton Brant Regional Tourism Association.

The resulting Tourism Strategy establishes a strategic approach to the growth and development of tourism – one that is cohesive and partnership-based, designed to enhance the image and competitiveness of Hamilton as a visitor destination, grow visitation, meet visitor expectations, and generate economic and social benefits for the city. The Strategy outlines a consensus-based vision, developed by representatives of the tourism industry and the City of Hamilton, and takes a visitor-centric approach to the development of tourism experiences and services. The strategic directions build on the initiatives and successes of the past, while identifying opportunities and performance targets to move the industry forward. The Strategy supports many existing community goals as expressed in a wide range of City plans and policies

The implementation of this Strategy is not the responsibility of any single organization, but is based on an understanding that ‘everyone is in the tourism business’ pursuing a common direction. The Strategy is designed to engage all the elements that support and enhance the visitor experience. By working together, a positive change will be made to the city's economy, culture and to the well-being of people who *live, work, play and learn* in Hamilton.

### The Process of Developing the Tourism Strategy

- Extensive research and review of:
  - Existing City of Hamilton strategic policies and reports relating to land-use planning, economic development, culture, and transportation;
  - Regional and provincial tourism strategies; and,
  - Comparable destinations and relevant best practices.
- Analysis of current and potential markets based on a review of City of Hamilton data, RTO 3<sup>9</sup> data and market segmentation studies, and provincial statistics.
- A series of four strategy planning workshops and interviews with City staff, tourism leaders and sector groups which were held in May 2014.
  - An internal T&CD workshop;
  - An industry forum (May) for the Tourism Advisory Committee, lead staff from other City departments and key tourism leaders;
  - A workshop for the arts, culture and heritage stakeholders;
  - A workshop for the meetings and conventions and sport tourism sectors.

The workshops involved a total of 78 stakeholders (including 28 City of Hamilton staff).
- Over 20 interviews were conducted with a broad spectrum of stakeholders and staff.
- A Leadership Forum held in June with 30 industry influencers built on the work of the earlier workshops.

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<sup>9</sup> RTO #3 region includes Brant County, City of Brantford, Halton Region (City of Burlington, Town of Halton Hills, Town of Milton, & Town of Oakville), City of Hamilton, Six Nations of the Grand River Territory and Mississaugas of the New Credit First Nations.

## The Process of Developing the Tourism Strategy

- Time was spent visiting a range of visitor sites and attractions and generally experiencing Hamilton as a visitor. A number of informal discussions took place during visits to sites and attractions, retail areas, hotels and restaurants.
- The field research also included first-hand experience of community events including Art Crawl, the World Music Festival and the Kick-Off event for the 2015 Pan-Am Games.
- Ongoing discussions with the Project Steering Team. This Team was comprised of department managers within the Tourism and Culture Division and a representative from the City's Tourism Advisory Committee.
- Review of current tourism marketing tactics.
- The development of two discussion papers:
  - Background Report;
  - Tourism Strategy Framework Report.
- Four action planning group discussions with key tourism leaders on:
  - The meetings and conventions sector;
  - Sport tourism;
  - Arts, culture and entertainment; and
  - Infrastructure and the public realm.
- The development of the Tourism Strategy document and the Project Steering Team's review of the Strategy.
- The development of the *Tourism and Culture Division Tourism Action Plan 2015 – 2020* and the Project Steering Team's review of the Action Plan.



## 2. The Current Situation

An assessment of the current situation provides the context for the Tourism Strategy and the rationale for its implementation. “Where are we now?” involves asking the following questions:

- What are the trends and factors that are influencing tourism and need to be taken into consideration in developing strategic priorities?
- Who is currently visiting Hamilton and how well is the industry performing?
- What is the planning context and existing leadership structure?
- What are the characteristics of Hamilton as a destination, including its strengths, weaknesses, opportunities and threats?
- What are the key issues that need to be addressed moving forward?

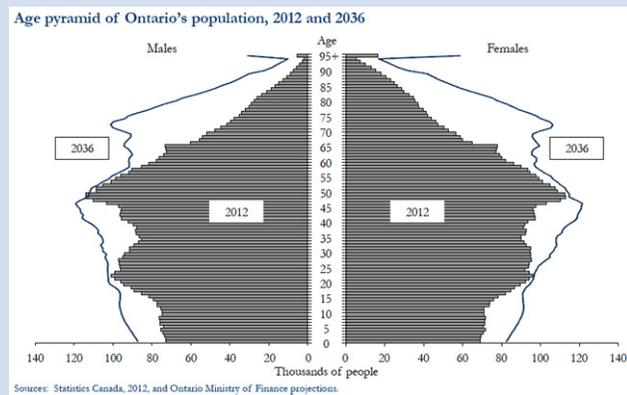
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### Factors and trends influencing tourism in Hamilton

While tourism continues to be one of the fastest growing economic sectors in the world and growth is anticipated to remain at over 3% per annum through to 2030<sup>10</sup>, there is a wide range of factors and trends that interact to influence the growth of the industry and the appeal of any destination. The following table summarizes those that are particularly pertinent to Hamilton.

#### Influencing factors and trends

**Aging population** – the number of seniors aged 65 and over in Ontario is projected to more than double from about 2.0 million, or 14.6% of population in 2012, to almost 4.2 million or 24% by 2036<sup>11</sup>. The Baby Boomer cohort is regarded as having greater levels of disposable income and is considered to be fitter than earlier cohorts – factors that are having an impact on activity patterns.



**New Canadians** – by 2025 it is anticipated that 36% of Ontario's population will be foreign-born<sup>12</sup>. Research indicates that the travel needs and preferences of new Canadians differ somewhat from the rest of Ontario's population, and that foreign-born travellers tend to have a higher level of interest in cultural and entertainment-related activities than they do in outdoor activities.

<sup>10</sup> UNWTO, 2011, *Tourism Towards 2030 / Global Overview*; and, 2014, *UNWTO Tourism Highlights 2014*.

<sup>11</sup> Ontario Ministry of Finance, Spring 2013, *Ontario Population Projections Update 2012 – 2036*.

<sup>12</sup> Ministry of Tourism, October 2007, *Ontario's Immigrant Travel Market and Its Impact on Domestic Travel*.

## Influencing factors and trends

**Changing consumer values** – the recent global economic downturn accelerated a shift toward post-modern values systems with ‘socially conscious consumers’ increasingly demonstrating values-based spending. In this economy, **authenticity** and **creativity** take on enhanced significance, and are reflected in ‘slow living’ trends and an increased concern for the environment and local culture. Embodying these values in visitor experiences (whether it is in local cuisine, alternative transportation options, or an ability to connect with local artists and artisans) will appeal to this emerging mindset.

**Growing demand for experiences** – travellers are seeking deeper, authentic and memorable experiences that allow them to connect emotionally with a destination and to interact with its residents. Leveraging this trend is critical to the success of Hamilton as a visitor destination. This will require a traveller-centric approach that looks at Hamilton’s tourism assets within the context of the benefits specific traveller segments are seeking, combined with their attitudes, values, motivation for travel and their demographic profile. This represents a new way of thinking and a shift from the supply-driven paradigm for tourism development.

**Increased competition** from new and existing destinations and the growing sophistication of destination management and marketing organizations (DMOs) have created a very competitive marketplace. A strategic and well-planned approach to growing tourism and to the use of scarce supporting resources has become more important than ever.

**Domestic travel has a strong ‘visiting friends and relatives’ (VFR) component** – in 2010 VFR accounted for almost 50% of domestic travel across Canada<sup>13</sup>. This element is particularly significant to Hamilton, with 58% of all person trips to the city motivated by the desire to visit friends and relatives – (two-thirds of all leisure trips).

**Technological innovation** is an area of change that is having a widespread impact on the tourism industry in terms of the visitor’s “Path to Purchase”<sup>14</sup>, its ability to enhance the destination experience, and its role in the activities of tourism businesses and destination marketing organizations. To be competitive there is a need to explore and further leverage the use of technology in the creation of compelling experiences and in the management and marketing of the destination.

**Adding value to the visitor offer** – with a shift in consumer values and the traveller’s increased ability to compare prices, there is an even greater need to add value to the visitor offer (generally through the delivery of highly personalized experiences) while maintaining quality of service.

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<sup>13</sup> TIAC and HLT Advisory, Fall 2012, *The Canadian Tourism Industry: A Special Report*

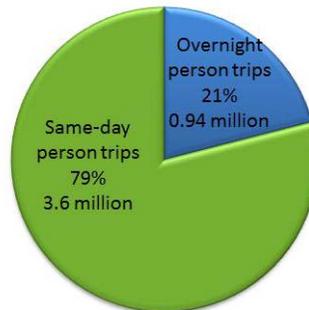
<sup>14</sup> Model developed by the Canadian Tourism Commission. It is based on breaking down consumer behaviour associated with making an actual travel purchase into different steps. When these are followed sequentially, they trace a path from the consumer first becoming aware of the destination right down to the actual point of purchasing an experience. (*Showcasing Canada on the World Stage: Corporate Plan Study 2010-2014.*)

## Current visitors and performance of industry

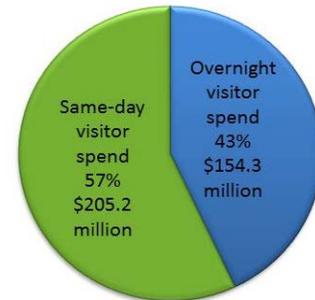
In 2011 Hamilton received an estimated 4.5 million person trips with visitors spending an estimated \$359.5 million<sup>15</sup>. These person trips account for approximately 45% of all visits to the RTO 3 region. However, almost 80% of these visits did not involve an overnight stay; and furthermore, of the 20% of overnight visits, slightly less than one-fifth used commercial accommodation.

Put another way – only 4% of all of the person trips to Hamilton involve overnight stays in commercial accommodation. While day visitors are important to the overall economy and for many individual small businesses, there is an ongoing need to identify ways of extending length of stay and increasing the number of overnight stays to ensure a healthy and sustainable industry that is maximizing economic benefit to the city.

**Total Person Visits 2011**



**Total Visitor Spend 2011**



	Occupancy Rate	Average Daily Rate	RevPAR
Ontario	48.4%	\$120.40	\$58.26
Downtown Toronto	60.7%	\$153.78	\$93.36
Hamilton (STR data)	61.6%	\$107.81	\$66.43
Niagara Falls	38.6%	\$126.34	\$48.74

Looking more closely at the accommodation sector<sup>16</sup>, the occupancy and revenue per available room (RevPAR) data are well above the provincial average. However, the average room rate is

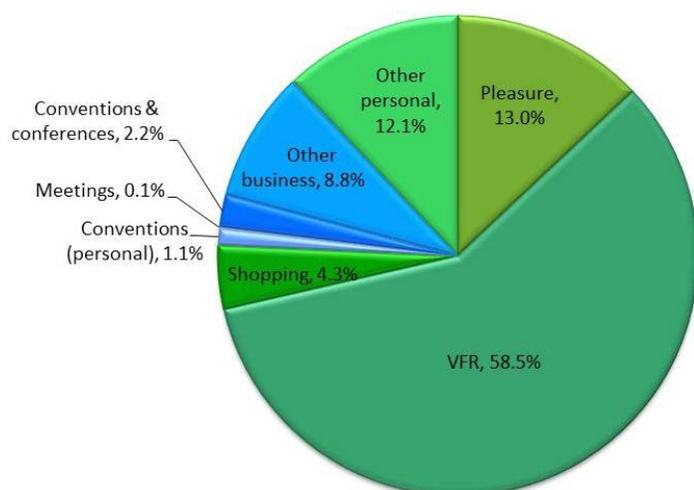
considerably lower. An emphasis on enhancing the reasons to visit Hamilton and providing greater value for leisure market visitors in terms of the overall destination experience could give the commercial accommodation sector a stronger basis for increasing room rates. In addition, enhancements to sports facilities and a focused pro-active effort at attracting more convention business could create increased demand, and therefore opportunities to increase hotel rates. This in turn will further strengthen RevPAR and overall spending within the local economy.

The ‘reasons for visiting Hamilton’ help to explain some of the challenges with overnight stays. When purpose of trip is examined, the predominant reason for visiting the city is to visit friends and relatives – and of course many of these visitors who stay overnight will stay with those same friends and relatives, creating relatively low value to the economy.

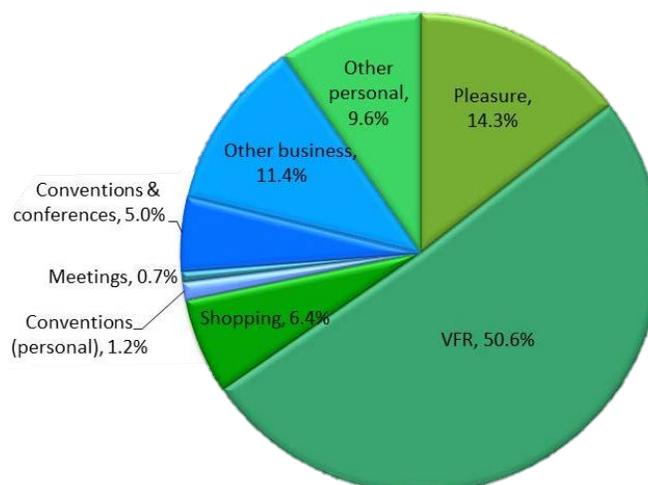
<sup>15</sup> City of Hamilton *Tourism Strategy Background Paper*, June 2014; and Footnote 3 of this report.

<sup>16</sup> Source for statistics on hotel Occupancy Rates, Average Daily Rates, and RevPAR: Ontario Hotel Statistics January to December 2013; Ministry of Tourism, Culture and Sports – with the exception of Hamilton. The source for Hamilton is based on data reported through Smith Travel Research (representing 67% of all rooms in Hamilton).

**Person Trips (%) by Purpose of Visit 2011<sup>17</sup>**



**Visitor Spend (%) by Purpose of Trip 2011**



At the same time, the number of visits for meetings, conventions and conferences (M&C) is lower than what the industry would like to see for Hamilton. M&C visitors spend proportionately more per trip than other market segments<sup>18</sup>, and are very likely to stay overnight in more expensive commercial accommodation<sup>19</sup>. This factor, taken together with the significant investment that has been made in event-related infrastructure and new hotel rooms, mean that the M&C market should be a key focus of attention moving forward and offers one of the most efficient ways of generating new visitation, filling hotel rooms, and increasing the value of tourism to the economy.

While the ‘purpose of trip’ data does not provide insight on sport-driven tourism, Hamilton is a key player in this market. Data relating to activity participation shows the importance of sports events and sport activity in general. In addition, municipal data<sup>20</sup> indicates that sports events over the period 2011-2013 generated an economic impact that exceeded \$50 million.

Activities Participated (Person Visits) <sup>21</sup>	%	Activities Participated (Person Visits)	%
Festivals/Fairs	2.5%	Casinos	4.0%
Cultural Performances	7.6%	Theme Parks	3.7%
Museums/Art Galleries	4.7%	National/Provincial Nature Parks	5.1%
Zoos/Aquariums/Botanical Gardens	4.5%	Historic Sites	7.8%
Sports Events	12.9%	Any Outdoor/Sports Activity	47.2%

<sup>17</sup> City of Hamilton Tourism Strategy Background Paper, June 2014 – based on the analysis of Statistics Canada microdata which contain anonymised data collected in the Travel Survey of Residents of Canada and the International Travel Survey. All computations on the microdata were prepared by the Ontario Ministry of Tourism and Culture for Census Division 25 City of Hamilton) and relate to 2011.

<sup>18</sup> A comparison of person trips by activity and visitor spend for Hamilton indicates this trend.

<sup>19</sup> Average daily room rate in Canada 2012 was \$129 (Hotel Association of Canada, 2014 *Hotel Industry Fact Sheet*); meeting attendee average expenditure on accommodation in 2012 was \$276 (MPI, 2014, *Meetings Activity Profile Report*).

<sup>20</sup> City of Hamilton – data supplied June 24<sup>th</sup> 2014 – internally prepared Business Summary using iDSS, 2011-2013.

<sup>21</sup> Ontario Ministry of Tourism, Culture and Sport and Statistics Canada – see footnote 17

In 2015 Hamilton will be known as ‘Soccer Central’ as it hosts the 2015 Pan Am/Para Pan-American Games’ Men’s and Women’s Soccer Games. With its existing reputation, expertise and infrastructure in professional and amateur sport, and the new Pan Am Stadium / Tim Hortons Field, Hamilton is well positioned to grow sport tourism, and implementation of this Strategy will facilitate a more strategic approach to developing this segment.

## Geographic markets

Eighty-four percent of person trips to Hamilton originate from near-in regional markets within Ontario<sup>22</sup>. Only 4% of all trips originate from markets outside of the province.

Origin of person trips to Hamilton	# Person Visits	% Person Visits
Region 1: Southwest Ontario	661,172	14.6%
Region 2: Niagara Falls Canada	557,479	12.3%
Region 3: Hamilton, Halton, Brant	604,278	13.4%
Region 4: Huron, Perth, Waterloo, Wellington	906,344	20.0%
Region 5: Greater Toronto Area	1,057,031	23.4%
Region 6: York, Durham, Hills of Headwaters	199,055	4.4%
Other Ontario Regions	351,958	7.8%
Rest of Canada	86,197	1.9%
USA	73,550	1.6%
Overseas	27,057	0.6%

Of the visits from ‘Rest of Canada’ (1.9%), the great majority (54%) are from British Columbia, with a further 19% from Quebec, 14% from the Maritimes and almost 9% from Alberta. New York State accounts for 33% of the US visits (1.6%), followed by 17% from Michigan and almost 12% from Illinois.

Overseas markets account for a very small proportion (0.6%) of all person visits to Hamilton. Of these, over two-thirds of the visitors are from Europe, with 31% from the UK, almost 14% from Germany and just under 13% from the Netherlands.

## Hamilton – the destination

### Geographic setting

Hamilton is a dynamic city with unique geographic and cultural attributes. It includes the downtown urban core and rural lands dominated by agricultural and environmental areas, with nineteen designated ‘rural settlement areas’<sup>23</sup>. The Niagara Escarpment and Lake Ontario are anchor elements within a city-wide natural heritage system that includes wetlands, woodlands, streams, waterfalls, and meadows. The significance of this natural heritage is exemplified by the degree of recreational opportunities and access that are available to visitors and residents, including the 980 hectare Royal Botanical Gardens (Canada’s largest botanical garden and a National Historic Site), the lands held by the

<sup>22</sup> 2011 data

<sup>23</sup> *Rural Hamilton Official Plan, 2006*

Hamilton Conservation Authority (owning or managing approximately 4,000 hectares of environmentally significant land), and a wide range of trail systems with both the Bruce Trail and the Trans Canada Trail traversing Hamilton. Equally the waterfront provides a distinctive leisure setting that will increasingly contribute to the visitor experience as the City of Hamilton continues to move forward with the implementation of the principles and policies contained in the *Hamilton West Harbour Waterfront Recreation Master Plan*.

The city’s strategic location at the western end of Lake Ontario, mid-way between Toronto and the Canada-USA border gives Hamilton a distinctive advantage in attracting visitors from the Golden Horseshoe and the near-in US states. The city is well connected by major transportation networks including a series of provincial highways, a growing intra-municipal transit system, main railway lines, and the John C Munro Hamilton International Airport. A private sector transit service connects Hamilton to nearby Toronto’s Pearson International Airport.

## The planning context

Creating alignment between the Tourism Strategy and related municipal, regional and provincial policies and plans is important in ensuring an integrated approach to planning, and one that supports and complements wider strategic priorities. The following exhibit summarizes the planning context for the Tourism Strategy.

### City of Hamilton Tourism Strategy – the Planning Context



## An overview of strengths, weaknesses, opportunities and threats

The following strengths, weaknesses, opportunities and threats were identified through the consultation process.

<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Proximity to Toronto and major US markets</li> <li>• ‘Ambitious city’ – expanding centres of excellences in education and health sciences</li> <li>• Sense of authenticity – unique neighbourhoods and business districts; industrial heritage; urban architecture</li> <li>• Waterfront</li> <li>• Niagara Escarpment, parks and trails, waterfalls</li> <li>• Artistic and cultural renaissance</li> <li>• Range of attractions and community festivals</li> <li>• Sports facilities, sports expertise and leadership</li> <li>• Asset management of municipal heritage buildings</li> <li>• Excellent events infrastructure</li> <li>• 600 new hotel rooms in core area</li> <li>• Value for money</li> <li>• Strong VFR market</li> <li>• Downtown visitor centre &amp; Lady Hamilton program</li> <li>• Hosting capability</li> </ul>	<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Weak positioning; unconnected tourism assets</li> <li>• Significant image problem</li> <li>• High visibility of social issues</li> <li>• Poor accessibility within Hamilton; limited signage</li> <li>• RTO 3 not yet perceived as a benefit to local tourism</li> <li>• Recent weakening of market position as a centre for convention business</li> <li>• Low daily room rates</li> <li>• Low level of person visits associated with M&amp;C business tourism</li> <li>• Tourism industry lacks cohesion</li> <li>• Insufficient marketing funds within T&amp;CD to market Hamilton effectively</li> <li>• Marketing message for Hamilton lacks clarity and is overly focused on Hamilton residents</li> <li>• Competing with Toronto and Niagara Falls</li> <li>• Limited tracking of industry performance</li> <li>• Limited scheduled direct air service to Hamilton</li> </ul>
<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• New positioning of Core Entertainment – potential to build on strengths as an event destination</li> <li>• Potential to leverage the 2015 Pan America Games – destination awareness and sport tourism focus</li> <li>• Proposed development of Rapid Transit</li> <li>• Further growth of Hamilton International Airport and connection to new markets</li> <li>• Building visitation relating to ‘centres of excellence’</li> <li>• Enabling local ambassadors to grow M&amp;C sector</li> <li>• Further enhancement of neighbourhoods and waterfront regeneration</li> <li>• New residential development in downtown area and McMaster University downtown campus developments generating a greater sense of vibrancy</li> <li>• City incentives</li> <li>• Enhanced application of information and communications technologies</li> <li>• Potential availability of marketing funds through a Destination Marketing Program (DMP)</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• Unforeseen changes to global and provincial economics</li> <li>• Weather extremes</li> <li>• Lack of public funding to facilitate change</li> <li>• Increase in competition for hosting major events and developing the M&amp;C sector</li> <li>• Strategic approach of competitor destinations</li> <li>• Ward-focused perspective at the political level in Hamilton has potential to undermine a more strategic and cohesive approach to developing tourism</li> <li>• Drive-through highway network within Hamilton</li> <li>• Limited capacity of trained workforce to meet longer-term industry requirements – expectation of labour shortages nationwide</li> </ul>

## Key areas to address

The analysis of the industry and stakeholder consultations identified particular areas of both opportunity and concern that need to be addressed in order to strengthen Hamilton's tourism industry. These include the following:

1. **The image of Hamilton as a visitor destination.** This is regarded as a concern from both external (visitors) and internal (residents) perspectives. It is a complex subject involving a range of social concerns, 'Code Red' neighbourhoods, urban traffic issues, industrial legacies, way-finding and signage, and connectivity issues.
2. **The performance of the commercial hotel sector.** While occupancy and RevPAR rates are well above the provincial average, the daily room rate is low and inhibits the profitability of this sector. Improving the perceived value of the Hamilton experience will provide a rationale for increasing room rates. At the same time, building on the city's significant sport and event related assets and its recognition for an exceptional capacity to host business, sport and entertainment events will further increase occupancy rates and room revenue.
3. **The limited funding available for destination development and marketing.** With the loss of approximately \$300,000 in annual provincial funding to Hamilton as a DMO, and the provincial abolition of the local Destination Marketing Fund at the DMO level together with other related funding factors, the budget for developing tourism and marketing Hamilton as a destination is limited to approximately \$160,000 in City funding. Clearly, this is insufficient to stimulate tourism growth and consideration should be given to increasing municipal investment.

In addition, reinstating a Destination Marketing Fund program – now known as the Destination Marketing Program (DMP) – and again endorsed by the province, is recommended. In light of the lower than average daily room rate, an additional 3% on the current rate is unlikely to make Hamilton room prices uncompetitive. This DMP (collected and managed by the industry) will provide additional funds to enable a range of incremental activities, including the establishment of a Tourism Business Development Fund to attract increased M&C business and sport events, City facilitated destination development, enhancement of image and positioning, and targeted leisure marketing activities.

4. **Alignment of all marketing and communications relating to tourism in Hamilton.** With the limited funds at the City's disposal for promoting Hamilton as a destination, attention must be focused on the core target markets identified in this Strategy and developing an integrated approach to marketing with key partners – particularly RTO 3, in light of this organization's mandate for marketing the region to the leisure market.
5. **A tendency to function in silos.** Given the nature of tourism and the extent to which it is a 'sector of sectors', cross-communication and collaboration can be challenging. This has been exacerbated inadvertently by the recent regional and municipal restructuring of the tourism marketing roles. As a result, it is important to build a strong and sustainable leadership model and to establish a collaborative approach to developing and promoting tourism.

6. **The Hamilton narrative and the essence of the Hamilton experience.** While this is yet to be clearly defined, the industrial/steel town heritage gives the destination an authentic ‘edge’ that needs to be embraced and woven into the visitor experience and story. There is a gradual transformation taking place that celebrates the ‘earthiness’ and ‘roots’ of the community. This is evident in the emergence of new businesses, the revitalization of older neighbourhoods such as Locke Street and Hess Village, and in the organic development of local events such as Art Crawl.
7. **The symbiosis between tourism and culture.** When we consider Hamilton’s current focus on culture, combined with the artistic and cultural renaissance, the growing number of festivals and events, and the strength of the more formalized arts and entertainment offerings – the result is a product/experience cluster that has the potential to truly differentiate the city and attract visitors.
8. **The unique geographic setting and historical context.** While Hamilton’s nature-based assets, its waterfront and its history and heritage may not be primary drivers for visitation, they create a distinctive backdrop to the destination and offer a range of activities and experiences that will enrich the visit and lengthen the stay. Identifying the potential for building on these strengths will contribute to improving the perceived value of the Hamilton experience and increasing the appeal of the destination for all target markets.
9. **The importance of understanding what makes, or could make, Hamilton distinctive for its ideal guests.** This requires analysing the identified core target markets, and then evaluating the tourism assets against their travel preferences and expectations. The process of understanding Hamilton’s ideal guests will help identify the unique attributes that can be conveyed through stories and narratives relating to corridors, routes and specific attractions within Hamilton.
10. **The geography of Hamilton and its related internal connectivity issues.** While Hamilton has the potential to offer a broad range of activities and experiences, many of the visitor sites and attractions are scattered geographically and a number are difficult to access without personal transport. This will require a focus on connectivity issues associated with public transport, pedestrian and cycle-way linkages, signage, and visitor-friendly navigation options.

It is important to act on each of these opportunities and concerns if Hamilton is to strengthen its profile as a preferred destination for its key markets, and if tourism is to increase its significance as a key economic driver throughout the entire destination.



### 3. Accelerating Growth – The Strategy

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#### “Here in this town there’s a feeling”

There is a sense that Hamilton is poised to embrace a rejuvenated identity as a visitor destination. The renaissance of the arts; the affordability of the city; the underlying sense of authenticity; the proximity to the Greater Toronto Area; the recent public investment in stadium infrastructure and private investment in city core accommodation; the development of new downtown residential opportunities; the anticipated downtown presence of McMaster University; and, the gradual renewal of urban neighbourhoods, together create an air of expectancy. This ‘vibe’ and innate optimism are adeptly captured in the words of the song, *This Town (Hamilton)* by Ash & Bloom (2014)<sup>24</sup>.

*Here in this town there’s a feeling  
Deep in the ground, hear it breathing  
Whispering loud, it’s revealing  
Seeds in the crowd of believing  
Weary of patiently waiting  
Hands in the clay, strong and shaping  
Seeing one day in their dreaming  
**Here in this town there’s a feeling...**  
**Anything can happen**  
**Anything can happen in this town***

*Hamilton – the City of a Feeling*<sup>25</sup> is the underlying sentiment of this Strategy. *It is our people, our stories, our resilience and our optimism that make the destination unique and ensure that visitors feel our welcome and experience our creativity and authenticity*<sup>26</sup>. These emotional and ambitious undertones make Hamilton distinctive and provide the bedrock for working together to build a competitive destination that everyone can take pride in.



<sup>24</sup> Lyrics from ‘Hamilton’ by Ash & Bloom (Matt McKenna and James Bloemendal with Peter Katz and Rob Szabo), 2014, JAD Media Inc.

<sup>25</sup> Credit for this phrase is attributed to Micah Van Dijk – *Hamilton – The City of a Feeling*, in *Urbanicity*, June 2014. This article portrays a sentiment that resonates with this Strategy.

<sup>26</sup> Overview of sentiments expressed in the stakeholder workshops.

## The vision for the destination

The following statement summarizes the vision for the destination and the visitor experience as expressed by tourism leaders and City staff in the planning discussions.

*“Hamilton is a distinctive destination recognized for creativity, authentic experiences and people, and outstanding hosting capability.”*

## Industry goals

The collective goals of the tourism industry are to:

- Increase the appeal of Hamilton;
- Enhance Hamilton’s image as a destination;
- Attract new visitors;
- Inspire visitors to stay longer and spend more money;
- Deliver authentic experiences; and,
- Excel in the provision of hospitality.

Success in attaining these goals will be demonstrated through growing overnight visitation year over year; creating new employment opportunities; strengthening business performance within the tourism sector; and, establishing a positive change in how residents, visitors and potential markets perceive Hamilton as a visitor destination. A target growth rate of 3% per annum will be a key indicator of success.

## Underlying principles

This Strategy is based on six principles that encapsulate the shared values and aspirations of both the tourism industry and the wider community:

- Alignment with the City’s Strategic Plan, related municipal development strategies and local, regional and provincial tourism priorities;
- Leveraging of the city’s creativity;
- Celebration of Hamilton’s authentic legacies and people;
- Commitment to collaboration;
- Optimized use of the city’s infrastructural resources; and
- Respect for the four principles of sustainability<sup>27</sup>.

These principles are the foundation for the Strategy and industry’s strategic priorities. They guide the growth of tourism and the strengthening of Hamilton as a competitive and appealing destination for its preferred markets.

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<sup>27</sup> Environmental, social, cultural and economic.

## Strategic priorities

To develop tourism as an economic driver for Hamilton and to realize the vision and goals will require focused attention on three strategic priorities:

1. **LEADERSHIP:** *Developing a sustainable and collaborative tourism leadership structure;*
2. **MARKETING and COMMUNICATIONS:** *Establishing a positive destination identity and growing Hamilton's share of the markets with highest potential for return; and,*
3. **DESTINATION DEVELOPMENT:** *Creating a great destination and enhancing Hamilton's 'welcome'.*

These priorities are inter-related, and making progress in one area will contribute to progress in other areas. Success will depend on the industry working together – a collaborative and integrated approach that applies energy and resources to three shared priorities will generate the critical momentum required to build a strong tourism industry and a competitive destination.

## Hamilton's demand generators

Based on an assessment of Hamilton as a destination and the performance of the industry, the product sectors and experiences that have the greatest potential to drive demand and contribute to achieving the goals are:

- **Meetings and conventions (M&C)** – with an emphasis on attracting an increased number of events and growing the significance of M&C as an economic sector;
- **Sport tourism** – with a focus on attracting regional, provincial, national and international events; and,
- **Arts, culture and entertainment** – with a particular emphasis on product development and strengthening the basis of differentiating Hamilton as a leisure destination. (With this approach Hamilton will be better positioned to attract events.)

**Supporting attractors** will play an important complementary role in generating a longer length of stay and level of interest in Hamilton, and it is essential that these attractors are also nurtured. This Strategy seeks to increase the significance of existing attractions, nature-based tourism, heritage and the waterfront as elements of the overall destination.

The implications of this assessment mean that for the next five years Hamilton's primary demand generators for high yield tourism will be M&C and sport – those areas with key players willing in principle to invest substantially in joint activity to develop the market. While there is clear potential for developing leisure tourism in the medium to long term, its success will require substantial shorter-term emphasis on creating authentic experiences, strengthening the sense of place, and ensuring that the necessary infrastructure is in place. Marketing Hamilton as a leisure destination will remain an important function for the City of Hamilton T&CD, but one that has to be accomplished within the constraints of limited funds. Success in this activity will depend on strategic collaboration with partners, particularly RTO 3 given its focus on leisure marketing, and innovative use of new marketing technologies.

Indeed, success overall will require the tourism industry adopting a new approach to working together in partnership. Therefore, the development of a sustainable and collaborative tourism leadership structure is essential to the implementation of this strategy.

## The ideal guests – target markets

In looking at the destination experience and the challenge of building a competitive destination, there is a need to adopt a visitor-centric approach. This requires an understanding and identification of the ideal guests for a destination – those visitors with a psychographic and demographic profile that would more readily align with the attractions and experiences on offer in Hamilton. It requires an enhanced awareness of the benefits these travellers are seeking, their attitudes, values, motivation for travel and their demographic profile. Through application of this research intelligence, Hamilton’s tourism stakeholders are in a stronger position to assess the alignment of their identified assets against the backdrop of what the customer wants. This heightened understanding not only assists in guiding the development of visitor experiences, but it also plays a crucial role in shaping the marketing message and in selecting ‘best-fit’ marketing channels and media.

Twelve unique provincial market segments based on social / emotional needs, importance of travel, travel experiences sought and use of technology in travel have been identified in the Ontario Tourism Marketing Partnership Corporation (OTMPC) segmentation research<sup>28</sup>. Six of these consumer segments have been recommended by the OTMPC as potential targets for RTO 3<sup>29</sup>. On the basis of further assessment and review of Hamilton’s product offerings, three primary segments have been identified as being of particular relevance to Hamilton – ‘Connected Explorers’, ‘Knowledge Seekers’, and ‘Youthful Socializers’. The profiles on the following page are extracts from the OTMPC / TNS 2012 report.



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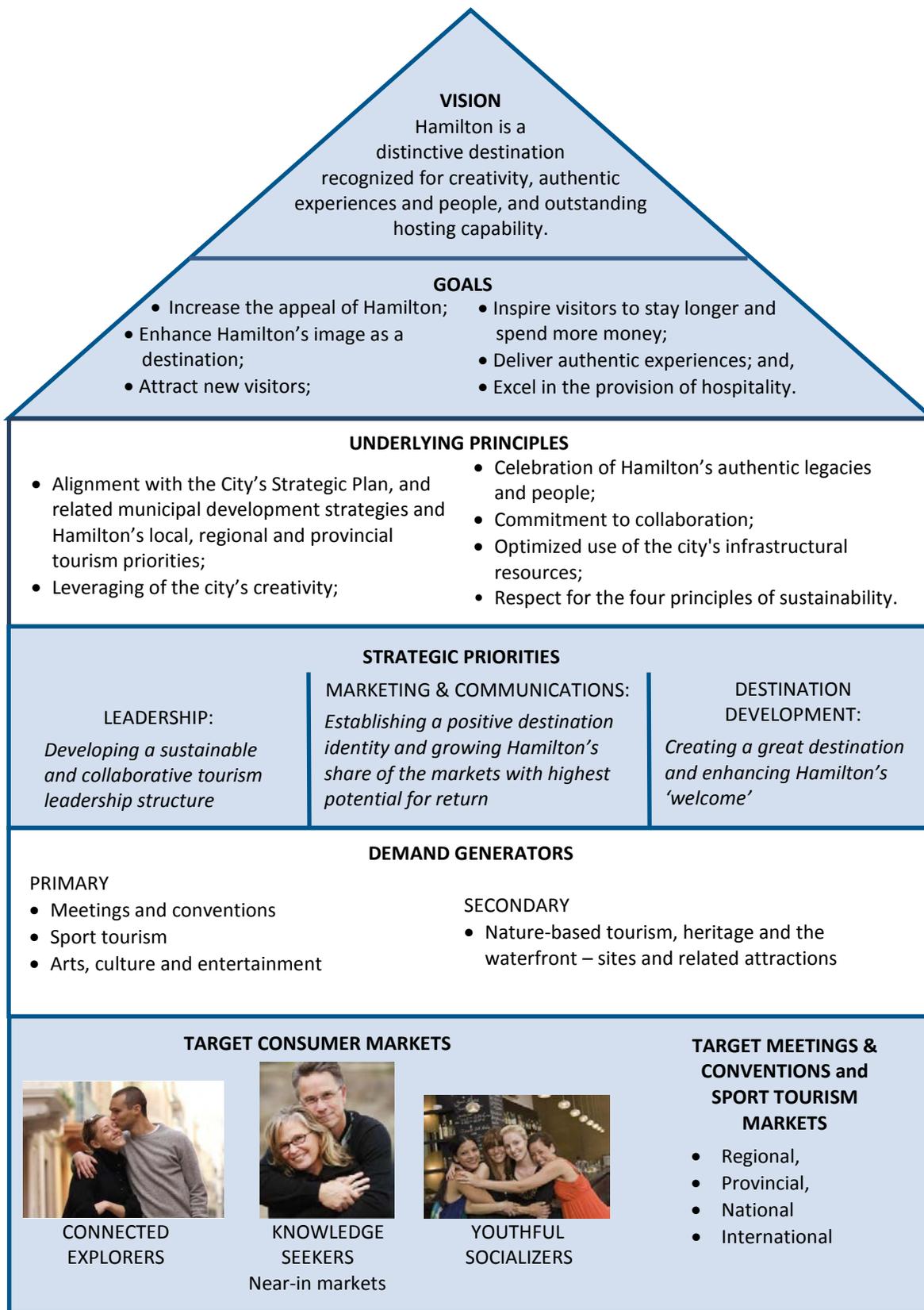
<sup>28</sup> OTMPC / TNS Canada, 2012, *Applying Consumer Insights To Attract North American Visitors*

<sup>29</sup> OTMPC / TNS Canada, 2013, *Consumer Insight Research RTO 3 Hamilton, Halton, Brant: RTO 3 Summary Presentation Segmentation Reach February 2013*

CONNECTED EXPLORERS	KNOWLEDGE SEEKERS	YOUTHFUL SOCIALIZERS
		
<p>Connected Explorers are young couples under 40, both with and without children. This segment has a psychological need to take a break from the everyday and be exposed to new experiences and knowledge. They are committed to expanding their horizons through travel. Interestingly, the Internet and new technologies are key instruments in facilitating these travel interests and experiences. They research, book and share travel experiences through new technologies – before, during and after trips. These consumers represent 8% of the provincial market and account for 12% of the visitor spend.</p>	<p>Knowledge seekers are couples in or nearing retirement, aged 55+, with a higher income. Travellers in this segment are looking to appreciate and understand the places they visit. Their trips are typically about expanding their knowledge and stimulating their minds rather than resting and relaxing. They are driven by a desire to explore culture, history, architecture and natural landmarks and often focus on sight-seeing, museums, galleries and historical sites. This segment represents 7% of the provincial market and accounts for 11% of the visitor spend.</p>	<p>This segment is a typical youth and student travel segment, comprised primarily of young single women aged 18-34 with lower than average income and travel budgets. The segment is driven by a love of socializing with friends on vacations. It is a group that wants to have fun and unwind on vacation and this is best achieved by spending time in a group and sharing experiences with others. Youthful socializers represent 10% of the market and generate 7% of the visitor spend.</p>



# Strategy framework



## 4. Strategic Priority 1: Leadership

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### *Developing a sustainable and collaborative leadership structure*

Effective implementation of this Strategy will require strong leadership that brings together the public and private sectors at a senior level to facilitate the growth of tourism, and the identification of additional funding for business development and marketing. The need for a sustainable and collaborative leadership structure with the capacity to initiate a new funding model and innovative leadership were consistent themes in the planning discussions, and the recommendations within this chapter reflect this emphasis.

### **Establishing a supplementary funding mechanism**

The task of growing tourism will require an injection of new funds. *To stay competitive, it is recommended that the City establishes its tourism marketing budget at a level comparable with other cities in Southern Ontario.* At the same time, there is a need to establish a supplementary funding mechanism to generate additional funds for tourism development and marketing. Under new direction from the Ministry of Tourism, Culture and Sport, destinations once again have the ability to establish a consumer-based marketing levy through a Destination Marketing Program (DMP)<sup>30</sup>. Funds from such industry-led programs are generally intended to be incremental and not replace resources traditionally available from municipal and provincial government sources. Allocation of these funds should complement other tourism development and marketing activities and be utilized as part of an integrated approach involving key industry partners, as proposed in this Strategy.

*The consultation process highlighted an interest in establishing a DMP – particularly as a means toward increasing the volume and value of M&C, sport tourism and events in the city. As local government cannot impose the new DMP and cannot be the body that collects the funds, it is recommended that the implementation of a DMP is led by a new consortium of partners – the Hamilton Tourism Partnership (see page 22). However, it critical that the City’s Tourism and Culture Division and the Hamilton Tourism Partnership work closely together to achieve shared goals. Synergy between public and private sector will be fundamental to the DMP’s success.*

In moving forward with a funding model that is based on a room levy, it is proposed that DMP partners will receive preferential rates and service delivery in cooperative city-wide initiatives.

### **The leadership structure – roles and responsibilities**

The planning process for this Strategy has created momentum and established a basis for a more inclusive and collaborative public-private partnership approach to the development of tourism. This will provide a strong platform for the implementation of the Strategy and for growing the tourism economy throughout Hamilton.

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<sup>30</sup> DMPs are industry-led initiatives involving the voluntary participation of hotels in a program whereby visitors are charged up to 3% of room revenues, and monies are remitted to an industry association which then typically transfers funds to a local or regional non-profit destination marketing organization or a municipality acting as a DMO. For further information, see [http://www.mtc.gov.on.ca/en/invest/destination\\_marketing.shtml](http://www.mtc.gov.on.ca/en/invest/destination_marketing.shtml)

The new leadership structure is designed to maintain the momentum and is comprised of the following existing and proposed new entities:

- The Tourism and Culture Division (T&CD) within the City of Hamilton;
- The new Hamilton Tourism Partnership (HTP);
- The new Strategy Implementation Group (SIG);
- The Tourism Advisory Committee (TAC); and,
- Regional Tourism Organization (RTO) 3.

## The Tourism and Culture Division

With the restructuring that has taken place at the regional and local level, there have been shifts in roles and responsibilities. The recent transfer of Tourism Hamilton into the City's new Tourism and Culture Division and the identification of new strategic tourism priorities within this Strategy, create an opportunity for a more integrated approach to tourism development and promotion within the City of Hamilton, to be led by T&CD.

While *Tourism Hamilton* is no longer an organization, it continues to be used as the City of Hamilton's corporate brand for tourism programs and services now being delivered directly by City staff as part of the T&CD. Working in this capacity, the T&CD is assuming the destination management organization (DMO) role and is the lead partner in overseeing and supporting the implementation of this Strategy. With a mandate to provide a strong leadership role in transforming the economy and environment of Hamilton through tourism, the T&CD will support tourism through undertaking the following functions:

- Enhance the image and awareness of Hamilton as an attractive destination for business, sport and leisure tourism;
- Work with partners in securing and hosting city-wide conventions and events;
- Stimulate and facilitate the development of Hamilton as an overnight leisure destination and promote it to 'best prospect' target markets;
- Provide visitors with the services to maximize their experience in Hamilton;
- Assist with the development of quality tourism products and visitor experiences, whether as partners or facilitators;
- Provide leadership and foster a collaborative approach to growing tourism;
- Monitor destination performance and ensure that the benefits of tourism are more widely understood by the broader community; and,
- Implement sound strategic policies cost-effectively.

The strategies and activities relating to these functions are outlined in the *T&CD Tourism Action Plan 2015 – 2020*, which is fully aligned with this Strategy. The Plan highlights the integration of tourism functions across the Division and identifies specific organizational changes and emphases to ensure the successful implementation of the Strategy, including:

- The establishment of a dedicated **Sales Unit** for M&C and sport tourism. This Unit will have a heightened focus on business attraction and will take a lead in identifying prospects and

coordinating bids for meetings, conventions, sports and other large events, while working closely with the local tourism industry.

- The establishment of a new **Visitor Experiences Unit** with responsibility for facilitating product development, operating the Visitor Centre and delivering services to visitors, and working directly with tourism partners to improve the visitor experience.
- An amended mandate for the **Marketing Unit** that includes a role in the delivery of tactics to support the M&C and sport tourism markets, increased emphasis on metrics and reporting, and closer working relations with RTO 3 to streamline leisure marketing activities. The Marketing Unit remains responsible for the promotion of the Division's museums, arts activities and events, and will take the lead in developing and implementing an integrated tourism marketing and communications plan for the Division. This plan will be developed in consultation with the new Hamilton Tourism Partnership (see Section 5).

In addition to this leadership role, the City of Hamilton will support the development of tourism through various other activities relating to creating a distinctive destination with a strong sense of place, and to strengthening the planning and enabling context for the growth of tourism. This Strategy is aligned with a range of municipal strategies and policies (see page 14) that include complementary tactics to be implemented by other City departments and divisions.

## The Hamilton Tourism Partnership

With the recent growth in key private sector players and their urgent need to grow the volume of business to the city, there is clear recognition that effective and sustainable leadership must also involve a more collaborative public-private partnership-based approach. This is particularly necessary in the context of growing the M&C sector, sport tourism and events in general. An informal partnership is already in place and there is agreement that the concept of a Hamilton Tourism Partnership should be developed further.

The proposed Hamilton Tourism Partnership (HTP), composed of industry leaders, will work in collaboration with the City to drive tourism business in the short and long term. The HTP will take the lead in exploring the feasibility of the DMP<sup>31</sup> and initiating its implementation (assuming that the program has sufficient support from the commercial accommodation sector). In this event, the HTP will have to be formalized and established as a legal not-for-profit corporation. There will be a need for a Memorandum of Understanding between all partners, including T&CD, which clearly states roles of partners and the mandate of the Partnership in growing M&C and sport tourism. It is anticipated that the Partnership will provide a forum to identify and realize opportunities for joint business development in a timely manner, and will lead tactical initiatives with a focus on business development.

## The Strategy Implementation Group

The new Strategy Implementation Group (SIG) has a longer-term focus and will advise T&CD staff on strategic direction and the implementation of tourism priorities identified in this Strategy, thereby ensuring that the implementation of the Strategy remains on track. The members of the SIG will be

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<sup>31</sup> There is a list of imperatives that should be considered when establishing the DMP. These are outlined in Appendix 1.

drawn from key City Departments with a developmental role in tourism, relevant community organizations<sup>32</sup> and representatives from the tourism industry. There may be some overlap of members between the SIG and the HTP.

## The Tourism Advisory Committee

The Tourism Advisory Committee (TAC) as a committee of Hamilton City Council will continue under its existing mandate to advise Council on tourism matters. City Council appoints members for TAC from the community. It is recommended that the Committee should include representation from the HTP and the SIG.

## Regional Tourism Organization 3

Hamilton Halton Brant Regional Tourism Association / RTO3 is an independent, industry-led, not-for-profit organization responsible for working with tourism partners to enhance and grow the region's tourism products and marketing activities. These activities have largely focused on providing direction for the region and identifying priorities for future product development; marketing and attracting investment on a pan-regional level; and, positioning the region for the future in a way that complements the existing work of partners within the region. **Given its emphasis on the leisure market, this Strategy highlights the importance of a strong working relationship and strategic alignment between T&CD, as Hamilton's DMO, and RTO 3 in all areas of mutual interest – consumer marketing, product and experience development, building industry capacity, and research and tourism metrics.** This will reduce duplication and will increase T&CD's ability to leverage the regional marketing resources in promoting market awareness of Hamilton as a leisure destination.

## Building a culture of leadership

The concept of strong leadership extends down to the level of the individual businesses and community organizations. If tourism is to grow and develop in a sustainable manner, **leadership and management capacity needs to be nurtured.** Building strong business leaders and promoting a culture of service excellence across all aspects of the visitor experience require a strategic approach to developing knowledge and skills. Elements of this Strategy and the *T&CD Tourism Action Plan* highlight the importance of establishing partnership-based mechanisms for business support and training to assist the industry in becoming more customer-centric and professional.

**Furthermore, continuing to build awareness of tourism as a key regional economic driver will be critical to improving perceptions of the industry and increasing resident, business and political support for the tourism sector.** In turn, this will enable Hamilton to become a stronger and more competitive destination with an *outstanding hosting capability*.

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<sup>32</sup> Examples include arts sector organizations, groups associated with waterfront development, nature-based activity organizations (e.g. mountain biking/cycling), heritage interests etc.

## 5. Strategic Priority 2: Marketing and Communications

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### ***Establishing a positive destination identity and growing Hamilton's share of the markets with highest potential for return***

*Attracting new visitors and inspiring our current visitors to stay longer and spend more* requires developing a strategic approach to all marketing and communications – one that is based on a good market mix, a clear definition of priority markets and a compelling marketing message that conveys the city's *creativity, authentic experiences and people, and outstanding hosting capability*.

In strengthening the market mix, there is a critical need to increase the proportion of overnight visitors staying in commercial accommodation, and reduce Hamilton's over dependence on day visitors. By focusing on Hamilton's identified primary demand generators, the broad priority target markets in order of significance are:

1. Meetings and conventions;
2. Sport tourism; and,
3. Leisure with an emphasis on consumer segments interested in arts, culture and entertainment.

As we expand the appeal of Hamilton and enhance its image as a destination, these segments will increasingly deliver the greatest economic benefit to the city and to individual tourism businesses. T&CD will require an integrated marketing and communications plan to target these markets, and to identify tactics that will strengthen market positioning and improve the overall perception of Hamilton among residents and within the marketplace.

### **Identifying the 'need periods'**

A targeted approach to marketing will only be truly effective if it is undertaken in the context of the city's 'need periods'. Attracting business at times of the year and days of the week when there is capacity in terms of commercial accommodation is essential to maximizing the yield from the identified markets. In addition, securing the kind of business that is appropriate to the availability and capacities of Hamilton's tourism infrastructure, primarily its meeting and sports venues, is also a major consideration. Having a comprehensive overview of the need periods and the ability to maximize these opportunities requires a booking calendar that can be used proactively to plan and execute sales and marketing strategies to deliver the highest yield possible, and to secure business for the city's tourism industry at the times of the year when the business is most needed.

### ***Strategic considerations and actions***

1. Develop and maintain an 'Advanced Booking Calendar' to support sales development. The Advanced Booking Calendar will be used to track potential and actual scheduling of events, festivals, M&C business, and sports related tournaments and activities for a forward-looking period of at least three years. The calendar will also be an essential planning tool for both T&CD and its partners to identify times of the year and days of the week when there is limited or no prospective business. This in turn will assist in scheduling and booking more localized or regional events and activities that do not have

as much potential to drive overnight stays in paid commercial accommodation. Knowing this information will reduce the likelihood of securing a local sports tournament during a prime month or week of the year in a venue which is potentially attractive to regional or provincial sports organizations.

- Assess all existing scheduling to make sure that the potential of dates and venues are being maximized where possible. Explore opportunities to reschedule where this is advantageous.
- Work with all partners to ensure that the planning benefits of developing and using a calendar are understood. The value of the booking calendar will only be fully realized if it is efficiently populated with the required events-related information. This includes identifying 'slack' or 'dark' periods in the use of major facilities when anchor tenants have low or no usage requirements.

## Targeting our best prospects

### Meetings and conventions

Over the years, Hamilton has enjoyed a solid base of business from the M&C sector. Considered as a second tier meetings destination<sup>33</sup>, Hamilton has attracted and hosted local, regional, provincial and national association and corporate meetings. To date T&CD has played a lead role in soliciting and securing interest in Hamilton as a potential meetings destination among meeting planners, and in facilitating the submission of consolidated city-wide meeting bids involving at least two properties with the likelihood of generating a minimum of 200 peak room nights.



With Core Entertainment and Carmen's as the new management of the City's major facilities for events (the Convention Centre, FirstOntario Place and Hamilton Place) and the development of new city downtown branded hotel properties by the Vrancor Group (Staybridge Suites, Homewood Suites by Hilton, and the refurbished Sheraton Hamilton Hotel), there are now new key partners with primary interests in securing events that will generate overnight stays. Developing an effective working

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<sup>33</sup> "Cities are often segmented into "tiers" for classification purposes. The definition of "tier" is subjective and is based on factors such as attractiveness as a convention destination (e.g., air access, range of hotels), supply of meeting and exhibition space, population base and destination awareness. Within a Canadian context, a "Tier 1" city is typically able to attract a number of international events (in addition to national and regional events), while a Tier 2 city might focus on national events and a Tier 3 city primarily regional events". (Ontario Ministry of Tourism Investment and Development Office, 2008, *Ontario Convention Market Analysis Final Report*).

partnership with shared goals and objectives and enhanced funding will be important to moving forward in a progressive manner.

Working strategically is all the more critical when the wider market environment is taken into consideration. The meetings, conventions and incentive travel sectors have yet to fully recover from the downturn experienced following the 2008 recession. Recent data from Meetings Professional International Foundation Canada indicates that within Canada the number of participants attending meetings in 2012 was still almost 40% below the level of participation in 2007<sup>34</sup>.

Furthermore, the marketplace has become increasingly competitive with the development of new meeting destinations and venues. In the periods examined by MPI Foundation Canada, the number of meeting facilities grew by 43%. This growth in supply includes the creation of new, purpose-built convention spaces in smaller destinations – a number of which traditionally did not have a presence in the meetings, conventions and incentive travel sector (e.g. Niagara Falls Convention Centre, Chatham-Kent Convention Centre in south-western Ontario). Further pressure has been added by the entry of existing, non-traditional meeting venues – a move that has been in response to a growing demand for less expensive meeting space and less restrictive booking windows. Venues such as movie cinemas are now competing for meetings which have a hybrid component with virtual attendees or multiple destinations meeting simultaneously, connected with a live webcast.

In light of these factors, Hamilton's M&C strategy will need to be highly focused and target organizations that align with Hamilton's core assets and strengths. These M&C assets and strengths include:

- The city's location in central Canada and its close proximity to Toronto and the U.S. border/ Buffalo area;
- Excellent transportation options utilizing Hamilton, Toronto, and Buffalo airports, GO Transit from Toronto and a number of major highways easily accessible to the city;
- Affordable convention venues located in close proximity to 700+ branded hotel rooms, including one which is conveniently connected to the convention centre via a covered walkway;
- Unusual and attractive venues for functions and social activities; and,
- A group of dedicated tourism professionals who demonstrate authentic, effective and customer-centric hosting capabilities that exceed expectations.

In targeting associations, the following are the primary opportunities:

**National associations** – the City has been successful at booking smaller national association meetings in the past, especially those that may be budget conscious, and there should be continued effort to identify relevant smaller associations that could meet in Hamilton. There is potential to target select national medical association meetings by leveraging the presence of McMaster's medical research facilities that are within walking distance of the Convention Centre. In focusing on national and international associations, the city has the advantage of being less constrained by negative perceptions within Ontario.

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<sup>34</sup> MPI Foundation Canada, May 2014, *Meetings Activity Profile Report, Canadian Economic Impact Study (CEIS 3.0), 2012 Base Year and 2009, Canadian Economic Impact Study (CEIS) Update 2007-2008.*

**Ontario-based associations** – these represent the greatest opportunity for Hamilton in the mid to longer term. These meetings move throughout the province and many are prone to meet in secondary destinations rather than the larger centres like Toronto and Ottawa. These meetings have not typically been affected by attendance attrition to the same degree as national meetings, as they involve less travel and generally are less expensive. **Attention should be focused on the sport, medical and education sectors**, with a secondary emphasis on religious meetings as Hamilton has a track record of successfully hosting such events, and the combination of the Convention Centre and the FirstOntario Centre provides good event options for such groups.

### **Strategic considerations and actions**

1. **The focus of the Strategy is to develop a collaborative approach to building M&C business with an emphasis on city-wide bids<sup>35</sup> that require capacity consistent with the city’s hotel room base.** The presence of new partners, the urgency of the need to grow M&C business in a strategic manner, and the need to establish new sources of funding will require a new partnership-based approach to working together. **This approach will be facilitated through the proposed Hamilton Tourism Partnership** – a partnership that will include key private sector players who now share a commercial imperative to increase the volume of business to the city. (However, in working together, it will be important that partners do not inadvertently contravene the Competition Act<sup>36</sup>.)
2. **Being successful in the M&C market segment will require developing a Hamilton Ambassador Program and working closely with influential local ambassadors in all Hamilton’s areas of excellence**, such as medical sciences and sports, to open doors to their respective associations. This approach, as demonstrated by the Glasgow Conference Ambassador Programme, can be a very cost-effective way of driving business. Such a program **will require development of a range of services designed to assist local professionals interested in securing conference business to Hamilton.** Developing and providing marketing material, helping with the preparation of bids and identifying suitable venues, hosting site visits, lobbying the relevant associations, assisting with booking services and the hosting of civic receptions will all play a role in attracting ambassador-led M&C business.
3. **Developing an effective tracking system is critical to monitoring the performance of all events-related business (M&C, sport and entertainment) and needs the cooperation of all partners.** T&CD has the ability to track performance related to tentative and confirmed M&C bookings through iDSS

The Glasgow City Marketing Bureau runs a very successful **Glasgow Conference Ambassador Programme**. The Bureau offers free support and advice for academics, scientists, medical professionals and business people who are considering hosting a conference in the city. In 2012-13 the Program helped secure more than a third of all conference business (£50 million) booked by GCMB – the best return on investment since it was introduced as the first of its kind in the UK in 1990.

<sup>35</sup> Involves a minimum of two properties – e.g. the Convention Centre and a hotel.

<sup>36</sup> The Competition Act is a federal law governing most business conduct in Canada. It contains both criminal and civil provisions aimed at preventing anti-competitive practices in the marketplace.

(internet Destination Sales System), the City's customer relationship management (CRM) and content management system (CMS) software program. Currently, iDSS is used to manage the bid solicitation process and report on tentative rooms booked and actual rooms consumed for a confirmed booking. [To be truly effective, the tracking system is dependent on all partners reporting progress through the partner interface extranet.](#) Without this critical feedback, it is difficult to track ongoing progress, ensure timely responses from various partners to prospective M&C clients, or measure overall economic impact of any given event. To this end, T&CD should:

- Hold a series of meetings to assist partners with using iDSS and to encourage comprehensive reporting. These meetings will need to be part of an ongoing program and should be held when any new staff members are appointed at participating partner venues.
- Ensure that the performance of all events is accurately tracked and reported within parameters that support confidentiality.
- Develop partnership-based protocols that incentivise reporting or make compliance mandatory. Ensure that all participating venues are working with the partner interface extranet.
- In tracking performance, measure Requests for Proposals and bids generated directly from all sales activity including trade show attendance, sales missions, and other in-market sales events.

4. Negative marketplace perceptions of Hamilton as a destination will still be encountered as a constraint to attracting M&C business. To combat this issue, [T&CD will continue to play a key role in building awareness of Hamilton as an events destination within target markets and implementing tactics to overcome the issue of negative perceptions.](#) In this capacity T&CD will:

- Ensure the availability of good quality information and content about the city for distribution through multiple online and offline channels.
- Maintain a program of hosting familiarization tours and site inspections for qualified meeting and event planners, and continue to strengthen market presence through activities associated with industry associations such as Meeting Professionals International (MPI) and Canadian Society of Association Executives (CSAE).
- Develop a public relations program aimed at meeting planners and M&C related media that profiles success stories and highlights Hamilton's outstanding hosting capability.
- Maintain up-to-date sales kits with current images that portray the city and its attractions and venues in an effective manner, and include a cost-analysis sheet that demonstrates the cost benefits of hosting an event in Hamilton.
- Utilize the proximity to Toronto and Niagara as an opportunity for an extended and enhanced visitor experience.

5. [To enable Hamilton to compete effectively, it is essential to have the DMP in place and to use a proportion of these funds to establish a \*\*Tourism Business Development Fund\*\*.](#) In 2007 Tourism Hamilton had an equivalent fund of \$500,000 (with contributions from the Ministry of Tourism, Tourism Hamilton, and three downtown hotels through their participation in the former Destination Marketing Fee (DMF) program). This fund was used to support bids for national and international

conventions and sport events through enhanced sales and marketing initiatives and the provision of incentives to event (convention and sport) organizers. Currently T&CD has an annual fund of \$50,000 which is clearly insufficient to compete effectively. With other cities and second tier M&C destinations similar in status to Hamilton working with substantially greater funds (e.g. Tourism Sault Ste Marie has an approximate budget of \$1.7m, and Tourism Kingston has between \$1.3m and \$1.4m), Hamilton is now at a distinct disadvantage and needs to address this issue, particularly if M&C is to be regarded as the primary overnight tourism source sector. In certain cases a proportion of these funds are acquired from the destination's Regional Tourism Organization (e.g. Toronto, Ottawa, Kitchener, Kingston and London<sup>37</sup>). As already indicated in Section 4, [it is proposed that the Hamilton Tourism Partnership pursue the implementation of the DMP in Hamilton.](#)

- Using STR<sup>38</sup> produced room data and reported occupancy for 2013, it is estimated that a 3% DMP on ALL rooms would generate approximately \$990,000 per annum. Assuming that in the initial phase of the implementation of a DMP only a select group of properties will participate, a conservative start-up estimate of the funding has been set at \$400,000. Given the priority emphasis on meetings, conventions and sport tourism, it is proposed that the initial allocation of funds is 75% to these priority markets and 25% to the leisure sector.
  - With the proposed 75% allocation to the development of M&C and sport tourism, a proportion of this should be assigned to a Tourism Business Development Fund, with the remaining funds to be used for the sales and marketing activities related to these sectors.
  - In the event that the DMP and Tourism Business Development Fund are put in place, develop a clear strategy for the use of these funds as part of a more comprehensive M&C sales and marketing plan.
6. Servicing the needs of confirmed events requires a clear understanding of roles. [The M&C and sport sectors will work in close cooperation with local event planners, and T&CD will support successful bids through relevant after-sales services for meeting and event planners.](#) This area of activity will be closely monitored as it is key to Hamilton's ability to demonstrate its *outstanding hosting capability*.
- As part of the overall 'servicing role', continue to explore opportunities for convenient and safe overnight bus parking. The lack of such parking is a constraint on growing event-related business.

## Sport tourism

Hamilton has established a strong track record in sport tourism and this sector will continue to be one that generates significant business within the city. The combination of a growing number of outstanding facilities and venues and the initial implementation of the 2005 *Hamilton Sport Tourism Action Plan* has strengthened the city's market position. The selection of Hamilton to host the forthcoming 2015 Pan Am

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<sup>37</sup> At this time, the new strategic plan for RTO 3 does not include direct investment in the M&C market – (*Regional Tourism Strategy Update Summary Report*, June 2014).

<sup>38</sup> STR provides hotel research with regular and custom reports covering North America and the Caribbean. STR provides a single source of hotel data covering daily and monthly performance data, forecasts, annual profitability, and pipeline and census information. <http://www.strglobal.com/about/str-companies/en-gb>.

/Parapan Am Games soccer tournaments is testament to the city's success in hosting sporting events. The new Tim Hortons Field adds to an already impressive array of venues that include FirstOntario Centre and a range of facilities associated with McMaster University and Mohawk College, together with City run sports venues and facilities – gymnasiums with basketball and volleyball courts, ice rinks, ball diamonds and soccer fields.

Leveraging these resources effectively and in a way that does not overly compromise existing local use, and enhancing the city's real and perceived competitiveness as a sport destination will be a priority. In this area of activity, it is anticipated that T&CD and other relevant City departments will take the lead in developing and promoting sport tourism. However, growing sport tourism will involve developing a partnership-based approach to initiating and pursuing bids, securing new funding through sponsorship and the DMP, and implementing the following actions.

### ***Strategic considerations and actions***

1. A comprehensive inventory of all sport facilities should be produced, with particular emphasis on those suitable for major events. It is important to assess the capacity of these facilities and use the Advance Booking Calendar to identify availability. Local demand is a constraint on the use of many City facilities and playing fields, while student and teaching needs of the educational institutions and the regular scheduling of professional and amateur sport teams reduce capacity of various other facilities. In each case these capacity factors need to be clearly understood and tracked to avoid undue conflict or loss of business.
2. The 2005 *Sport Tourism Action Plan* was a foundational strategy in Hamilton becoming a viable sports tourism destination. This Plan should be reviewed and updated to take into account changes in the sport tourism landscape and the improvements made to Hamilton's sport tourism infrastructure. The Plan contains core elements that remain relevant today, but the tactics need to be refreshed.
3. To maximize the opportunity for growth in sport tourism, the focus is on larger events attracting both spectators and competitors rather than more localized and regional community tournaments, as the former will have a greater economic impact on the city, while the latter tend to use community oriented facilities and can be disruptive to local users. T&CD, in partnership with industry should set a target to secure two or three major events each year, with the emphasis being on those that require capacity consistent with the city's hotel room space.
  - When seeking to identify best opportunities, the horizon should be two to four years ahead and bids should be initiated accordingly. The Advance Booking Calendar should be used to highlight times when new events are most needed in the shorter term to fill gaps.
  - The current emphasis will obviously be on maximizing the use of existing facilities. For the longer-term, there should be recognition of the need for new venues or further investment in existing facilities.
  - Tournament opportunities in new and emerging recreational sports within the community should be reviewed, including cricket (using the anticipated new facilities in Confederation Park), Ultimate Frisbee, and disc golf.

4. As with the M&C sector, the strategic growth of sport tourism and attraction of major events will require funding support. While the current municipal funding is suitable for community recreation events, it is inadequate for attracting major events. Effort will be required to secure additional funding through:
  - Demonstrating the potential economic impact of sport tourism in the updated *Sport Tourism Action Plan*;
  - Working with private sector partners and attracting new funds through the DMP, assuming it is put in place; and,
  - Identifying opportunities for alternative funding and implementation models used successfully in other sport tourism destinations.
  
5. The major events of 2015 will provide the opportunity to develop systems and services to ensure a high quality of experience for visitors to such events and a high level of benefit to Hamilton. With strategic planning and well-thought through execution, the following elements should provide an ongoing framework for strengthening Hamilton's ability and reputation for hosting major events:
  - The cultural festival to take place in 2015, from the Juno Awards through to the Pan Am Games (March to July 2015), creates the opportunity to test out a wide range of entertainments and activities for visitors, and ways of leveraging the city's *creativity* to enhance other sectors of tourism and to strengthen Hamilton's identity as a *distinctive destination*.
  - Develop a visitor services plan which looks at the visitor experience from a holistic perspective. Delivering a seamless experience is key to hosting a successful event and the mechanisms and partners involved need to be clearly identified, and underlying processes need to be as fully integrated as possible. With the Pan Am Games, the plans for free transportation to and within Hamilton represent important elements of delivering this seamless experience. As the city and regional transportation system evolves in the future, smart ticketing solutions will play a key role in servicing the needs of visitors.
  - The process of selling early tickets for a major event presents an opportunity to contact prospective visitors/buyers and encourage them to stay in Hamilton. It will be important to develop and promote add-on activity packages and create other incentives to attract visitors to Hamilton for overnight stays, rather than day visits.
  - Following the Pan Am Games, the key stakeholders should assess the impact of the Games on tourism and the effectiveness of the marketing and visitor servicing, with a view to developing 'toolkits' for event organizers.

## The leisure market

Hamilton's core leisure market lies largely within the Golden Horseshoe (Toronto to Niagara). Currently the demand is primarily for day visits, with 'visiting friends and relatives' (VFR) being a key motivating factor in generating overall demand. With the significant decline in marketing funds following the provincial structural and funding changes associated with the establishment of the RTO model, T&CD has limited resources for leisure marketing. [Looking to the future, the strategic emphasis for growth in](#)

this market is on building Hamilton's appeal as a leisure destination through product and visitor experience development, with a particular focus on consolidating the city's recognition for its arts, culture and entertainment.

As outlined in Section 3, leisure marketing will be targeted at three of the provincial segments identified through the OTMPC market segmentation research – namely, 'Connected Explorers', 'Knowledge Seekers' and 'Youthful Socializers' with a geographic focus on the near-in markets – particularly within the Golden Horseshoe. Of course Hamilton will resonate with other leisure segments such as 'Nature Lovers'. However, the growth potential and ability to generate longer stays and a greater level of visitor spend in a competitive marketplace lie in the three identified segments. Taken in combination these segments represent 25% of the Ontario marketplace and account for 30% of the visitor-spend.

While the leisure market remains a potential growth market, in the shorter-term the city's ability to drive overnight stays and increase the value of tourism lie in the M&C and the sport tourism markets. Given this prioritization of markets, a pragmatic approach is needed with respect to the leisure market – one that is based on strategic segmentation, an enhanced use of digital marketing and close collaboration with RTO 3 (given its mandate to concentrate on growing the leisure market).

### ***Strategic considerations and actions***

1. In light of current marketing trends and technological innovation, priority should be given to increasing the use of digital channels for information distribution to the leisure market. Through developing a stronger and more compelling online presence for Hamilton as a destination, it will increase stakeholders' ability to leverage RTO 3's regional marketing activities while strengthening the positioning of Hamilton and its sense of place as a destination.
  - T&CD will take the lead in redeveloping the official Tourism Hamilton website and in developing and implementing a tactical plan for digital campaigns and social media. The strategic use of social media should encourage a greater level of engagement with both visitors and residents, promote a heightened awareness of Hamilton as a distinctive destination, and increase participation in visitor experiences and events. There should be links to existing bloggers and social media sites, many of which already have dynamic content on Hamilton as a destination.
  - The refresh should include a comprehensive consumer-facing events calendar that will stimulate interest in events and will service trip-planning needs of residents and visitors alike.
  - The process of creating a more compelling digital presence will involve developing a Content Management Plan covering acquisition, management and distribution of content.
2. To target 'Connected Explorers', 'Knowledge Seekers' and 'Youthful Socializers' effectively, there is a need for a comprehensive understanding of these ideal guests and the types of marketing and communications activity that will be most effective in influencing them. RTO 3 and T&CD have an important role in undertaking further analysis of the OTMPC market segmentation data and disseminating the research intelligence to the wider industry.
  - Workshops and training sessions will be required to develop an in-depth working knowledge of the three segments, and to understand how this may be used in developing and/or

enhancing visitor experiences that will help in differentiating the destination, and in modifying the marketing message and associated visuals.

- Refresh and expand the T&CD image library and assist stakeholders, travel trade and media in selecting images that are relevant to the targeted leisure segments. A pro-active approach to stimulating user generated content (from both residents and visitors) will assist in the refresh process.

3. As new visitor experiences and product are established (e.g. the James Street Corridor – see Section 5), there will be a need for T&CD to develop appropriate collateral, and for partners to work together to raise market awareness of the new offerings.

### ***RTO 3 – Priority Origin Markets and Marketing Objectives***

- Near-Ontario markets of GTA, Kitchener/Waterloo/Cambridge and Windsor/London corridor due to projected growth and sheer size of the potential.
- Niche markets in near-U.S. but only in partnership with OTMPC or other Regions.
- Overseas visitors, both first time and repeat, seeking value-added experiences to enhance Toronto-Niagara itineraries. Growth markets of India and Brazil into the GTA are of particular interest.

Ongoing marketing efforts continue to focus on achieving results related to the following objectives:

- Increasing the number of same-day and overnight visitors to the region, as well as the proportion of overnight visitors;
- Increasing length of stay in roofed accommodations in the region;
- Increasing the yield per visitor;
- Improving consumer perceptions of the region;
- Positioning authentic regional experiences and key demand generators as identifiers of the destination and the brand;
- Linking and clustering experiences within the region; and,
- Enhancing partner marketing strategies and tactics in a manner that complements, and does not duplicate partner efforts.

Source: RTO 3 - *The Heart of Ontario: A Three Year Regional Tourism Strategy*, Final Draft August 2011; and *Hamilton Halton Brant Regional Tourism Association-Stakeholder Report*, Oct 2012 - Mar 2014.



## 6. Strategic Priority 3: Destination Development

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### *Creating a great destination and enhancing Hamilton's 'welcome'*

The planning process highlighted the importance of focusing on destination development and creating memorable visitor experiences as a means of increasing the market appeal of Hamilton and encouraging over-night stays. Market trends demonstrate that visitors are increasingly looking for engaging experiences characterized by authenticity and creativity. This chapter looks at the opportunity to respond to these trends and to differentiate Hamilton within Southern Ontario. The essential objective is to get people to stay as long as possible, engage fully in tourism related activities, and enjoy the city urban and rural areas to the maximum.

### **Harnessing the momentum**

The notion of *Here in this town there's a feeling...Anything can happen*<sup>39</sup> is reflective of a groundswell of change in the social, cultural and economic fabric of the city. Harnessing this momentum and developing a destination experience that will resonate with the marketplace will require concerted and coordinated effort to create a great destination – one that will be not only *a great place to live, work, play and learn*, but also a sought-after destination for leisure travellers and a preferred location for meeting and event planners.

While Hamilton has a wide range of events, attractions, activities and facilities to offer today's visitor, its success as a destination will ultimately be in the totality of the experience and the degree to which this can be differentiated. This concept of totality involves a number of key elements that will need to be addressed, including:

- Exploring how to 'connect' and enhance the growing range of tourism assets into a compelling visitor experience that will appeal to Hamilton's priority markets;
- The quality and vibrancy of the public realm, including actual and perceived safety;
- The connectivity to and within the destination, including access to and use of trails and natural assets;
- Recognition of the city's built heritage as an integral component of the visitor experience and the importance of maintaining its distinctiveness; and,
- The availability and timeliness of visitor services and the ease of trip planning.

As this chapter looks at specific opportunities to create a great destination, these elements are common themes that are addressed in the strategies and tactics. Pursuing these opportunities will require the involvement of multiple stakeholders working in some degree of synergy – often in pursuit of pre-existing goals that complement destination development. The summary Action Plan identifies key partners for each of the initiatives.

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<sup>39</sup> Lyrics from 'Hamilton' by Ash & Bloom (Matt McKenna and James Bloemendal), 2014, JAD Media Inc.

## Strengthening Hamilton’s distinctive attributes

Culture as defined in the City’s Culture Plan (see diagram) forms the basis of what makes Hamilton distinctive.

*Culture is a broad concept which encompasses the people, places and things that reflect our community identity and channel creative expression<sup>40</sup>.*

This section seeks to build on the Culture Plan through focusing on a number of the identified components in the plan. **It highlights that the future appeal of the destination is not so much defined by novel solutions and major new developments – rather it is based on providing impetus for the ongoing implementation of many of the City’s existing policies.**



Sharpening and strengthening the existing commitment to downtown renewal, neighbourhood revitalization, the preservation and conservation of Hamilton’s heritage (built and natural) and celebration of its culture, the regeneration of the waterfront, and the enhancement of mobility choices, together will create a destination of high appeal and will transform the image of Hamilton for residents and visitors alike.

The following discussion identifies initiatives that have the greatest potential to build on Hamilton’s distinctive attributes.

### James Street corridor project

James Street North and South represent a corridor that runs through the heart of Hamilton’s informal arts and cultural district, connecting the waterfront, the core of the city and the Niagara Escarpment. It offers the visitor the potential opportunity to experience both the historic and contemporary character of Hamilton, and the eclectic qualities of the burgeoning arts scene. The growing success of the monthly Friday evening Arts Crawl events and the annual signature Super Crawl on James Street North already demonstrate the potential of the street to appeal to a broad array of visitors and residents. These events have become critical to the economic viability of many of the artisan businesses and are increasingly playing a role in defining the ‘identity’ of Hamilton.

[This Strategy recommends building on this organic growth of a cultural experience and using the corridor concept as an enabling framework to develop a unique Hamilton experience that celebrates the](#)

<sup>40</sup> City of Hamilton, 2013, *Transforming Hamilton through Culture*

provenance and creativity of the city. The value of an urban cultural-heritage corridor and the ability to use the concept to tie together disparate elements of the urban Hamilton visitor offering was recognized through review and discussion of Dublin as a case-study and the current development of *The Dublin* – Dublin’s new Discovery Trail.

Creating an experience that runs the length of James Street North and South not only raises the profile of existing businesses along the corridor, but it also ties the urban core to both the waterfront and the escarpment in a thematic way that currently does not exist. Adjacent features, such as Gore Park, the King William Art Walk, and the Hamilton Farmers’ Market on York, become ancillary sub-experiences that allow visitors to meander. A branded corridor will assist the visitor in experiencing and ‘making sense’ of Hamilton’s unique geography and heritage, and offers the potential to tell the Hamilton ‘story’, including the story of steel. Ultimately it is about creating a corridor experience that provides a sense of discovery for visitors – one that engages them in a meaningful and memorable way and offers innovative opportunities to interact with local artisans, businesses and residents.

THE JAMES STREET CORRIDOR	
Elements & Characteristics	Today’s Challenges
<ul style="list-style-type: none"> <li>• Walkable – approximately 3.5 kilometres</li> <li>• Growing number of artisan businesses – galleries, ‘retro’ retail outlets, and traditional family businesses</li> <li>• Monthly Arts Crawl and annual Supper Crawl</li> <li>• Streetscape elements that create a sense of familiarity, nostalgia and conviviality</li> <li>• Combination of grittiness and urbane</li> <li>• Strong entrepreneurial spirit</li> <li>• Emerging culinary sector</li> <li>• Intersects with Gore Park and Veterans’ Place, and benefits from the revitalization, animation and beautification of this area</li> <li>• Visitor Centre in the Lister Building – potential to function as a stronger hub within the Corridor</li> <li>• Unique and distinctive city core architecture</li> <li>• Flanked by two key elements of Hamilton’s geography – Lake Ontario and the Niagara Escarpment</li> <li>• Proximity to current and proposed transportation hubs</li> <li>• Partially served during the summer months by a free shuttle service from the downtown core to the waterfront</li> </ul>	<ul style="list-style-type: none"> <li>• Elements are currently not connected – significant sense of disconnect between the escarpment, the down town core area and the waterfront</li> <li>• No mechanism or framework in place to look holistically at the entire corridor from the visitor perspective – a range of BIAs and neighbourhood associations</li> <li>• Lack of way-finding signage (new wayfinding strategy for the Lower City now in place – September 2014)</li> <li>• Very limited interpretation along the route – no storytelling</li> <li>• High visibility of social issues in the core area – location of Social Services exacerbates this challenge</li> <li>• Actual and perceived safety concerns, particularly in the evening, undermine the walkability of the route</li> <li>• Problems relating to the current tax regime – can inadvertently encourage demolition although James St. North has additional conservation measures in place</li> <li>• Empty storefronts in city core</li> <li>• Poverty issues at the north end of the route</li> <li>• Currently there are ‘empty spaces’ in the</li> </ul>

## THE JAMES STREET CORRIDOR

Elements & Characteristics	Today's Challenges
<ul style="list-style-type: none"> <li>• Pedestrian access to the Escarpment via the James Street Stairs</li> <li>• New Hamilton Bike Share program – SoBi</li> <li>• Residential architecture</li> <li>• Cross-section of the Hamilton 'story' – potential to present a range of themes from the founding days of Hamilton through to the growth of new centres of excellence and academic repute</li> </ul>	<p>route with limited points of interest</p> <ul style="list-style-type: none"> <li>• Free shuttle service only services part of the route and is seasonal</li> <li>• Access to the top of the escarpment is restricted to those fit enough to climb 227 stairs – sense of 'destination' is limited; currently not taking real advantage of the view</li> <li>• Sense of waterfront destination to the corridor needs to be strengthened – (revitalization is underway)</li> </ul>

### Bringing the route to life as a visitor experience

A Corridor Concept Plan should be developed by T&CD based on the following tactics:

1. **Develop the overall positioning of the route to encapsulate what makes it unique and distinctive.** Understanding the target leisure markets and the motivations and expectations of these travellers will provide insights on the types of experiences that will resonate with these visitors.

2. **Select three to four key themes that capture the significance of this part of Hamilton<sup>41</sup>.** This will provide the basis for positioning the corridor, and will connect the corridor and the various points of interest. These themes should assist in unifying the route and in establishing a new collective identity<sup>42</sup>. They will have the most potential to capture the visitor's interest and imagination, and they will provide the structure for collecting the stories and developing the overall narrative of James Street. In addition, these themes can be

**The *Dubline*** has characterized time, space and themes:

**Time** – three different eras: medieval, early modern and modern. Each captures key stages in the evolution of the city

**Space** – three distinct geographical areas

**Themes** – five thematic elements:

1. ***conflict, conquest & contest:*** *military might and political power ... from earliest times to present day*
2. ***trade, industry & commerce:*** *from street traders to stock brokers, from market stalls to banking halls*
3. ***faith, hope & charity:*** *churches, graveyards and hospitals*
4. ***cool, clever and creative:*** *art, music, literature, film, theatre*
5. ***commemoration & celebration:*** *capital city*

(Source: <http://dubline.failteireland.ie/>)

<sup>41</sup> Consider Hamilton's 'ideal guest' profiles when selecting these themes – see Section 5.

<sup>42</sup> The Culture Plan established three main themes: a) immigration, diversity and inclusion, b) innovation and creative economies, and c) citizens, engagement and protest. While this work should be reviewed, it is likely that the application of these themes to a visitor product may not be overly pertinent.

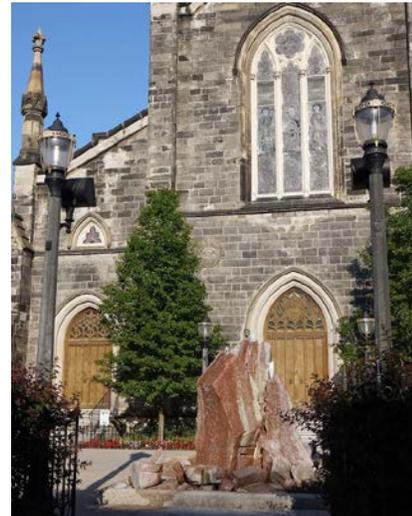
used to create linkages with other sites and locations within Hamilton in a way that extends elements of the corridor experience and spreads the benefits of tourism.

➤ Themes for consideration:

a. **History of Hamilton** – this will be central to one or more of the selected themes. The City of Hamilton can trace its European roots to the late 18th century and its history has shaped the planning of the city, its economic roles, its buildings and distinctive architecture, and its public realm.

i. **An ecclesiastical sub-theme.** This sub-theme offers leveraging potential for other areas within the city.

ii. **Industry** – Hamilton’s significance as an industrial centre has had an impact on the morphology of the city since the 1840s. Its investment in railway infrastructure, its role in the industrialization of Southern Ontario, its unionist history and today’s remaining steel mills are all key elements that have shaped the story of Hamilton and can be reflected in James Street, with linkages to key attractions such as the Hamilton Museum of Steam and Technology.



b. **Arts and culture** – a central theme that presents an opportunity to highlight and celebrate the creativity of Hamilton and its artistic entrepreneurial spirit.

i. **A culinary sub-theme** – James Street and adjoining streets provide a number of unique restaurants and cafés that have the potential to highlight the ethnic diversity of the area, local personalities, and unique settings. Building an emphasis on local produce will strengthen the positioning of the corridor and the culinary sector in general, and will enhance the linkages with the agricultural sector (and hence the benefits to the local economy).

c. **Architecture** – this theme has been partially documented in the downtown area through the Downtown Built Heritage Inventory Pilot Study. The extensive survey information and classification of all properties within the Downtown Core, including historic photos and the Historic Context Statements<sup>43</sup> will be valuable in

“Hamilton’s cityscape on closer examination tells a vivid romantic story. And a city is its buildings. They are the outward expression of ideals, of affluence and speculation, of pride and prejudice.” (McKay, A. G, 1967, Victorian Architecture in Hamilton)

<sup>43</sup> The Historic Context Statements provide concise documents that emphasize and succinctly explain the current character and role of the precinct, how it developed into what it is today and the factors that contributed to its identity. Each Historic Context Statement contains an introduction, historical overview, historical themes and attributes, referenced in Appendix “A” to ERA’s report, *Hamilton Downtown Built Heritage Inventory DRAFT Heritage Constraints and Opportunities*, attached as Appendix “A” to Report PED14039.

developing this theme<sup>44</sup>. Further assessment of the areas outside the Study Area will need to be undertaken, as recommended in the Pilot Study – commencing with identifying and defining the area of interest, developing a historic context statement and then evaluating and classifying individual properties. In the interests of moving forward with the James Street Corridor as a tourism initiative, it is further recommended that the remaining relevant stretches of the corridor are prioritized in this assessment process.

Work involved in progressing this theme will need to be done in partnership with the Planning and Economic Development Division.

3. Undertake a comprehensive audit *from the perspective of the visitor* and create an inventory of all existing and current points of interest and how they relate to the themes. A starting point for this inventory should be the City's Cultural Mapping Project which has already identified and mapped a significant number of cultural assets.

- The inventory should identify:
  - a. Primary and secondary points of interest (buildings, businesses, architectural facades etc.)
    - i. Unique elements
    - ii. Classification – e.g. 'must see', 'hidden gem', 'Hamilton buff'
    - iii. Opening hours (if relevant)
    - iv. Contact details (if relevant)
    - v. Key themes – e.g. economic, industrial, cultural, heritage
    - vi. Specific stories
  - b. Existing interpretation and street animation
  - c. Off-shoot routes – points of interest etc.
  - d. Potential to highlight visitor appeal (e.g. through interpretation, aesthetic improvements etc.)
  - e. Potential threats and areas of concern (e.g. visitor safety, empty storefronts, and location of formal and informal services for economically and socially deprived sectors of the population)
  - f. Signage requirements for pedestrians.



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<sup>44</sup> It has been recommended in the Hamilton Downtown Built Heritage Inventory (February 2014) that the Downtown Hamilton historic context statements be taken into consideration in the development of urban planning policies, secondary plans, and in the review of development proposals, as well as in the development of Cultural Heritage Conservation Plan Statements. This Tourism Strategy should be included in this list of plans and policies.



Artist's rendering

4. The implementation of the Gore Pedestrianization Initiative<sup>45</sup> offers significant opportunity to create a hub area based on the revitalized 'Promenade' between James Street South and John Street South. The restoration of the Connaught Hotel building as luxury apartments will add to the sense of place. Looking west, there is the opportunity to highlight the Hamilton Art Gallery, and the entertainment complex around Hamilton Place.

5. Review the walkability and legibility of the corridor. *Step Forward*, the Hamilton Pedestrian Mobility Plan, presents a paradigm shift that focuses on rebalancing pedestrian and vehicular mobility on Hamilton streets. This Plan provides rationale and insight for reinvigorating the James Street corridor, and highlights many factors that will need to be given consideration if a higher level of pedestrian use is anticipated, such as lighting, street furniture and perceived safety issues.

- Currently the free shuttle service from the core to the waterfront and the new bike share program offer ways of strengthening the options for exploring the corridor. These services will need to be promoted in conjunction with the corridor, and opportunities to expand the shuttle bus route will need to be explored.
- The signage requirements can be addressed under the new Wayfinding Strategy for the Lower City of Hamilton<sup>46</sup>.

6. Creating strong and attractive waterfront and escarpment destination elements over time that function both as key attractions in their own right and as effective 'book-ends' to the corridor, will add significant value to the route and to the overall appeal of Hamilton.

- The regeneration of the waterfront area and the implementation of the *Hamilton West Harbour Waterfront Recreation Master Plan* are key to developing the overall waterfront visitor experience. The James Street Landing Public Realm as anticipated in the Master Plan, proposes a landing and outdoor space that will truly complement the corridor experience in character and function. With the future development of the Pier 5-8 lands and the transformation of *West Harbour into a vibrant, mixed used, pedestrian friendly destination...for living, working and recreation*<sup>47</sup>; and, with the expansion of the marina from 200 to 700 slips and the increased presence of boating visitors, the northern end of the corridor has the potential of becoming a major visitor hub. The development of the James Street corridor concept will ensure that this waterfront destination is aesthetically and thematically well connected to the downtown core.

<sup>45</sup> The image is an artist's rendering of the preferred conceptual plan for the Gore Pedestrianization Initiative

<sup>46</sup> Wayfinding – Lower City of Hamilton – (PED14218) (Wards 1, 2, 3 and 4).

<sup>47</sup> Waterfront Initiatives Update West Harbour- Piers 5-8 Servicing Studies Agenda Item 7.4 General Issues Committee Wednesday January 22, 2014.

- At the southern end of the route, the James Street stairs provides access to the escarpment. Other than walking to a viewpoint or exploring the site of the former Mountain View Hotel, there is little sense of destination. Consideration should be given to exploring the feasibility of developing a stronger visitor experience – one that enables visitors to enjoy the views to the full. This will require identifying opportunities for a restaurant as a permitted use. The reinstatement of an incline railway would add a unique component to the overall corridor experience and could play a strong role in telling the corridor narrative, while strengthening connectivity between 'The Mountain' and downtown. This initiative is longer-term in nature and will involve the development of a tourism investment attraction strategy.
7. **The Visitor Centre in James Street North is well positioned to act as the central showcase and information hub for the corridor experience. Its size and location presents the opportunity to rethink the use of this space in a way that will ensure it becomes a key asset to the tourism industry and visitors alike.**
- Its potential role includes the following:
    - a. Interpretation related to the corridor story through exhibitory and related information.
    - b. Retail outlet for local artisans and regular animation.
    - c. Booking agency for city-wide tours and ticketing outlet for a range of attractions and events.
    - d. Starting point or staging area for related theme-based tours to other parts of Hamilton.
    - e. Attractive displays relating to 'what's on', supplied on a rotating basis by theatres, galleries, other attractions and events, subject to cost considerations.
    - f. A central depot where literature on attractions and events can be collected by business operators.
    - g. A base for media during key events and press conferences.
8. **Developing the corridor experience and bringing the product to life will involve a collaborative approach to creating new experiences and animating the area.**
- Continue working with Business Improvement Associations (BIAs) to animate the corridor and explore opportunities with local businesses to build on the success of the Art Crawl.
  - The development of the new Hamilton GO Station – the Hamilton-LIUNA mobility hub offers an exciting opportunity to revitalize this part of the corridor. Not only will it be a major new access point to the city and James Street North, but the aesthetic improvements to the area will make a considerable impact on this part of the corridor.
- There are plans to build a plaza across from the LIUNA Station which will include large open spaces and a stage area. The intent is to animate the area through local programming, periodic presence of food trucks and markets, and to highlight local heritage and history. All of these plans should be looked at within the context of this proposed James Street Corridor visitor experience to make sure the developments complement and strengthen the tourism initiative.

- Develop an interpretive plan as an integrated part of the Corridor Concept Plan that identifies opportunities for:
  - a. The establishment of new special interest walking tour products – e.g. an architectural walking tour.
  - b. Telling the James Street / Hamilton story through a range of media, including the use of augmented reality and smart phone technologies, and through a trail guide.
- Work with local businesses to create new or market existing innovative and interactive visitor experiences that will allow the visitor to ‘delve deeper’ or learn new skills from locals related to the key themes of the corridor. Understanding the visitor segments – their attitudes, values, motivations and desired benefits – will assist in creating unique experiences that will add considerable value to the corridor as a destination and to differentiating Hamilton in the marketplace. Where market-ready experiences already exist, there is a need to work with the relevant operators to package and promote these experiences as an integral part of the corridor offering. Product development of this nature will require an emphasis on mentorship.

9. A key factor in the success of the corridor experience will be the overall ambiance of the route. Ensuring that there is a high degree of vibrancy and generating a sense of happiness will require a proactive approach to both the ongoing land-use planning and conservation of the corridor<sup>48</sup>, and to the management and enhancement of the public realm.

- Explore ways of using the findings of the Expressing Vibrancy project currently underway in Hamilton. This project recognizes that neighbourhood vibrancy is a unique combination of cultural assets, and is supporting community-based identification and quantification of local features and aspects that contribute to its economic and social vitality, and lead to a sense of community cohesiveness<sup>49</sup>.
- The implementation of tactics from *Step Forward* and related neighbourhood plans will contribute toward developing a quality environment and improving the aesthetics and walkability of the route.

As an overall project, the James Street Corridor is entirely in keeping with the *Urban Hamilton Official Plan*, Section 3.4: Cultural Heritage Resources Policies. The implementation of these policies and objectives within the context of the Corridor will strengthen its development as a key visitor experience.

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<sup>48</sup> It has already been recommended elsewhere that properties classified as ‘Significant Built Resources’ be considered candidates for designation under Part IV of the Ontario Heritage Act, together with certain ‘Supporting Resources’ subject to further cultural heritage assessment. This designation would then play an important role in the conservation of these buildings. It is also important to move forward with the recommendation that non-designated properties on the Register of Property of Cultural Heritage Value or Interest be identified in the appropriate development or permitting information system. This would allow development applications that may affect the properties to be flagged and would strengthen the rationale for conducting a Cultural Heritage Impact Assessment. In addition, it will create a mechanism for offering grants and loans to assist property owners with the ongoing protection and management of the buildings.

<sup>49</sup> <http://expressingvibrancy.ca/project> - this is a partnership-based project involving the City of Hamilton, Cobalt Connects and the Centre for Community Study

## The waterfront

The waterfront is an outstandingly attractive resource for recreation and tourism development. It could be argued that it should be the primary location for tourism in the future. However, the space available for tourism development is limited and it is too far from Hamilton's existing city core tourism infrastructure of hotels, Convention Centre, entertainment, art gallery and arena.

Nevertheless, there is both the need and the opportunity to develop tourism on the waterfront. The need is for the creation of new jobs and additional income for one of the more marginalized areas of the city. The opportunity is to create a 'micro-destination' where visitors stay, play, meet and eat.



1. There is the potential opportunity for a hotel within the Piers 5 to 8 development plans<sup>50</sup>. Following the tourism planning consultations, it is recommended that this should be a full resort hotel, with both leisure and meeting facilities to encourage high levels of longer stay business all year round, and to maximize both the profitability of the hotel and the economic benefit to the city and the local neighbourhood.
  - Undertake a feasibility analysis for a resort hotel offering meetings facilities that are designed to complement rather than to compete with the Convention Centre, and would focus on corporate meetings and conferences (including training activity) for up to 300 delegates. Differentiating a hotel in this location from its competitors will require a mix of specialized meetings facilities (including the latest meetings' technology) and leisure facilities designed to attract several different market segments year round, and encourage a longer length of stay from the business/meetings clientele.
  - This initiative should be included in the tourism investment attraction strategy.
2. To create an effective micro-destination on the waterfront, it will be important to develop the range of amenities, services and facilities throughout the area, with a particular focus on the needs and wants of the market segments that will be targeted in developing the city's tourism. This has implications for the precise mix of services within the Pier 8 development and for the enhancement of the amenities and activities throughout the waterfront area and the main access routes, especially the James Street North corridor.
3. In the interim, continue to work with key players in this area to encourage a collaborative approach to presenting the waterfront as a micro-destination within the city through marketing collateral and visitor-oriented events.

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<sup>50</sup> Identified in the *Hamilton West Harbour Waterfront Recreation Master Plan* and permitted by *Setting Sail Secondary Plan for West Harbour*

## Leveraging the strengths of the region



Moving beyond the lower city area, the outskirts of Hamilton has much to offer the visitor, particularly those with an interest in ecotourism, agri-tourism, hiking, cycling and mountain biking. The area includes the Royal Botanical Gardens, Canada's largest botanical garden (980 hectares/2,422 acres) which is regarded as one of the country's plant biodiversity hotspots with more than 1,100 plant species, and is inclusive of Cootes Paradise (a National Historic Site, a Nationally Important Bird Area, and a Nationally Important Reptile and Amphibian Area). The 4,000 hectares/10,000 acres held by the Hamilton Conservation Authority; the 100+ waterfalls and cascades along the Niagara Escarpment, and the Escarpment itself which is designated a UNESCO World Biosphere (one of 12 in Canada); the renown Bruce Trail and a wide range of local trails taken together with the Gardens, represent a unique set of assets for ecotourism and nature-based activities.

In addition, the agricultural landscape and the growing number of agri-tourism businesses; the rural settlement

area and their unique cultural identities; and, long-established attractions such as African Lion Safari Park and Flamboro Downs provide the basis for building a much stronger Hamilton experience and sharing the benefits of tourism.

There is little doubt that these attractions, settlement areas, conservation areas and outdoor recreation sites are playing a key role in attracting day visitors and in providing experiences for those visiting friends and relatives. [The emphasis moving forward needs to be on identifying ways of elevating the significance of these related activities as distinctive experiences and 'supporting demand generators' in terms of increasing length of stay, complementing the James Street Corridor and waterfront experience, and attracting niche markets.](#)

1. **Guided tours.** [The city's rural area offers significant potential for the development of smaller-scale guided interpretive and activity tours. Areas of focus include themed tours on agri-tourism, ecotourism, and soft adventure, and tours that build on the James Street Corridor experience and the interest in arts, culture, heritage, steel town history and architecture. For visitors to urban Hamilton, knowing how to best experience and access the outskirts of the city can be challenging, and the establishment of new tour operating businesses should be encouraged.](#)

- [Work with entrepreneurs and local tour companies, historians, artisans, farmers and naturalists to establish new interpretive and activity themed tours.](#)
- [Explore the opportunity of utilizing digital technologies in the development of self-guided tours.](#)

2. **Ecotourism and soft adventure.** There is a wide array of opportunities for promoting and enhancing existing activities and developing new experiences. *Generating growth will require a collaborative approach that looks at the development of new experiences and the potential to add value to existing products; the development of innovative itineraries and opportunity to build unique packages designed to encourage an extended length of stay; and, the use of signage and interpretation as a means of enriching the experience.* Where relevant, a regional approach that involves working with partners beyond Hamilton may be advantageous in maximizing the natural advantages that the Niagara Escarpment offers.
  - Work with operators either through workshops or on a mentorship basis to develop an understanding of experiential tourism and the principles of developing memorable and interactive experiences for visitors that can generate new sources of operator revenue, an increased return on investment (ROI), and a higher return on emotion (ROE) for the visitor.
  - Work with relevant partners to implement the *Cootes to Escarpment Park System Conservation and Land Management Strategy*. An important component of the Park System is the protection and restoration of natural connections between the Niagara Escarpment and Lake Ontario through Cootes Paradise. An inter-regional recreational hiking trail is proposed to link the various regional Heritage Lands, which in turn will further connect to the Lake Ontario Waterfront Trail and the Bruce Trail. Completing the relevant projects will play a key role in elevating Hamilton's profile as a destination for ecotourism and recreational hiking.
  - In building recognition for ecotourism, work with specialist guides in the initial phase of developing niche products such as birding. Capitalizing on this market will require creating online and offline collateral and site infrastructure, such as hides and viewing platforms, to assist the visitor in maximizing the visit.
3. **Trails.** *The trails infrastructure forms the backbone of Hamilton's nature-based tourism offerings. To ensure that these trails can be effectively leveraged in building experiences, it is essential that ongoing progress is made in the implementation of the *Hamilton Recreational Trails Master Plan (2007)*. This document prescribes a multi-use, off-road recreational trail system throughout the City of Hamilton and demonstrates a clear commitment to developing trails as a basis for the ongoing growth of sustainable tourism.*
  - The Master Plan recognizes the importance of clear signage. Way-finding remains a challenge for visitors and it is recommended that the strategies outlined in the recent Wayfinding report for the Lower City are extended to the remainder of the city.
  - Similarly the Trails Master Plan discusses the collaborative approach that is needed in developing and maintaining trails. Collaboration remains critical and all parties concerned with trail infrastructure within Hamilton should continue to work together to improve the various aspects of trail usage, including trail-heads, parking, linkages and connectivity, safety and interpretation.
  - Promoting awareness of trail-based opportunities requires online database-driven resource tools that provide an overview of trails, and assist the user with trip planning and understanding the nature and suitability of the trail and any related experiences. The majority of the trails appear to be listed on [Geotrail](#) – a national interactive trail map.

However, this resource is inadequately promoted as the primary information tool and there are gaps in the provision of information (e.g. the Smart Commute Hamilton Trails). Given that a number of different stakeholders have populated the database for Hamilton, including Tourism Hamilton, there is a need to work together on a periodic basis to review the map and ensure that it is comprehensive and current in its information.

4. **Cycling.** Hamilton has acquired significant recognition as a cycling centre. It is the home of the National Cycling Centre Hamilton, a not-for-profit corporation created as a legacy organization following the very successful hosting of the 2003 UCI World Road Cycling Championships<sup>51</sup>. In addition, the City has expended considerable effort toward planning and developing a cycling network for commuter, utilitarian and recreational cyclists through the expansion of on-street and off-street cycling facilities. *Shifting Gears* (2009), Hamilton's Cycling Master Plan, identifies a preferred Corridors Network of 270 links consisting of existing and planned cycling facilities, comprising on-street bicycle lanes, paved shoulders, signed routes and multi-use trails. [Cycling as a preferred mode of transport and as a recreational activity has grown exponentially in recent years – with the ongoing implementation of the Master Plan and the imminent launch of SoBi Hamilton \(a bike share program based on 'smart bike' technology involving 750 bicycles and 105 stations\), Hamilton is well positioned to leverage this trend.](#)
  - Work with relevant cycling organizations to leverage existing cycling events as tourism attractors.
  - Build on existing efforts that promote recreational cycling in the Hamilton area (e.g. Ontario by Bike!<sup>TM</sup>) and continue to encourage attractions and sites of interest to participate in related programs.
  - The emphasis now needs to be on pairing cycling with other visitor interests and using cycling as the basis of growing demand in niche areas such as agri-tourism and visiting heritage attractions. Here again there are entrepreneurial opportunities for tour operators and outfitters to develop experiences that give the visitor a memorable cycling tour. In addition, it is recommended that self-guided themed cycle tours and itineraries be developed.
  - The implementation of *Shifting Gears* will ensure that the required street and trail furniture is in place. Equally there is a need to work with accommodation providers on meeting the overnight requirements of cyclists. A comprehensive program to develop and promote cycle tourism is in place in Québec, which includes a certification program for accommodations and campgrounds. The overview of the Bienvenue cyclistes!<sup>TM</sup> certification [program](#) is a helpful resource in discussing the types of amenities that cyclists look for from accommodation providers. In addition, Ontario by Bikes! offers guidance on sustainable mobility and tourism solutions and is involved in certifying and promoting bicycle friendly businesses and cycle tourism across Ontario.
5. **Mountain biking.** [The opportunity to develop a focus on mountain biking should be explored fully.](#) While there are trails identified as mountain biking trails within Hamilton and a number of these are featured on mountain biking national and international trail websites (e.g. [www.singletracks.com](http://www.singletracks.com)

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<sup>51</sup> Union Cycliste Internationale.

and [www.everytrail.com](http://www.everytrail.com)), the development of mountain biking as an activity designed to stimulate new visitor demand has not been fully considered. The geography associated with the escarpment and a number of the current trails offer the potential for a stronger focus on this rapidly growing activity – and one that is recognized as generating a high rate of spending<sup>52</sup>. Currently there are few communities in Southern Ontario that are pursuing this market. Within the RTO 3 region, the only area that appears to be promoting mountain biking to any extent is Halton<sup>53</sup>. Looking further afield to Bruce County (a distance of 230 km), there is a strong emphasis on mountain biking and a dedicated website promoting a series of trails and a Mountain Bike Adventure Park. At Collingwood (a distance of 180 km) Blue Mountain offers lift-assisted mountain biking experiences during the summer months.

- While the *Shifting Gears* Master Plan looks at cycling and off-road cycling, it does not refer to mountain biking. Developing an addendum or updating the plan to include mountain biking would provide a more comprehensive overview of all cycling elements.
- As part of this process, there should be discussions with local mountain bike clubs to determine interest levels in a stronger commitment to mountain biking, and to exploring opportunities for developing a mountain bike skills park and a series of dedicated trails for different skill levels. By way of comparison, the development of a new Bike Park in Hinton, Alberta has successfully drawn a number of mountain bikers away from Jasper National Park to the new facilities and trails, and is having a significant positive impact on the image of Hinton. A handbook on developing mountain biking as a tourism sector has been produced by Destination British Columbia and provides a broad overview on how to develop the sector from a tourism perspective. Other resources are available from the International Mountain Bicycling Association.

6. **The agricultural sector.** Tourism offers the opportunity to strengthen and diversify the agricultural economy through the development of agri-tourism<sup>54</sup> and through promoting greater use of local foods in the culinary sector. Both elements need nurturing. While there is an extensive listing on the Tourism Hamilton website under ‘Countryside’, it is difficult to get an overview of the Hamilton agri-tourism visitor offering and experiences. Equally, there is limited emphasis on ‘local foods’ as part of the overall experience or as an attractor, although events such as Farm Crawl, and those organized by Dish Crawl and Pop Up Hamilton are beginning to raise the profile of agri-tourism and local foods.

- Develop a greater understanding of the agri-tourism (as proposed in the *Hamilton Economic Development Study*) and culinary sectors. This will involve bringing together a disparate group of stakeholders (many who do not perceive themselves as being in the tourism business) and identifying the strengths and weaknesses of these sectors from a tourism perspective, and where the opportunities lie.

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<sup>52</sup> The Sea to Sky Corridor from Vancouver’s North Shore to Whistler generated \$10.3 million in spending from riders outside the area in a 3½ month period in 2006 (Western Canada Mountain Bike Tourism Association, 2006, *Sea to Sky Mountain Biking Economic Impact Study*).

<sup>53</sup> The Halton Conservation Authority’s trails are highlighted on the RTO3 Nature Unexpected [webpages](#).

<sup>54</sup> The role of agri-tourism in counterbalancing current images of Hamilton and contributing to a ‘green’ identity and the need for an agri-tourism study of opportunities are highlighted in the *Hamilton Economic Development Strategy 2010-2015*.

- Hamilton has a number of farmers' markets – consider working with a chef to develop a culinary learning experience that includes selecting the produce from the market.
- Review practices elsewhere. As tourism continues to move from a 'must see' to a 'must experience' phenomena and as visitors seek authenticity, local food and beverages become an increasingly important element in expressing the identity of the destination. With a large rural and agricultural hinterland, businesses in Hamilton are well placed to showcase local produce. Examples of destinations that have created culinary routes that tie together the culinary and agri-tourism sectors include the Taste Trail in Prince Edward County, Charlevoix's Flavour Trail and Prince Edward Island Flavours initiative; while Vancouver's Edible Canada is a good example of how one private sector operator leveraged its farmers' market location into a thriving multi-line culinary tourism business. Resources and assistance are available from the Ontario Culinary Tourism Alliance.

## Festivals and events

Festivals and events can play a major role in attracting visitors, animating the destination and strengthening the positioning of Hamilton. They can offer compelling reasons to visit and can be an incentive in encouraging visitors to stay longer and explore the wider community. Their role in attracting visitors in the shoulder season can be very successful, and they contribute to building a distinctive destination.

To be effective in growing the visitor economy, festivals and events should:

- Showcase Hamilton and promote its unique attributes – reinforcing Hamilton's recognition for arts, culture and entertainment, its heritage and nature-based strengths, and its sports identity;
- Provide the basis for generating overnight stays and increasing tourism revenue;
- Be scheduled at times of the year and days of the week when business is needed as opposed to popular dates such as holiday weekends; and,
- Foster Hamilton's reputation for its 'outstanding hosting capability'.

There is a major difference between community events designed to primarily benefit local residents and festivals and events that aim at attracting visitors and benefiting the wider economy. This Tourism Strategy is concerned with the latter. The following actions are required to strengthen the events sector and should be reflected in the forthcoming Events Strategy.

1. [Increase the emphasis on attracting, facilitating and developing events that attract visitors and benefit the wider economy](#); and, continue to leverage local-resident focused events that have demonstrated ongoing success in a way that will attract visitors and generate greater level of visitor expenditure. Maximizing opportunities associated with events will require collaboration and an enhanced level of coordination between stakeholders.
2. [Establish a comprehensive consumer-facing events calendar to ensure that visitors can plan more effectively](#).
3. [Undertake a comprehensive planning and evaluation process for each major event and develop an event hosting plan template for major hosted events](#) to address the complexity of issues and opportunities, including:

- Transportation requirements and solutions;
  - Anticipated accommodation requirements;
  - The overall visitor experience – information services, ticketing etc.;
  - Marketing and communications tactics;
  - Event branding;
  - Complementary cultural festivities that will animate public gathering places;
  - Government funding opportunities;
  - Sponsorship requirements;
  - Potential role of supporting partner organizations such as T&CD, RTO 3, and the BIAs;
  - Opportunities for cross-promotion; and
  - Opportunities to showcase local foods.
4. **Identify and attract or develop potential events that will reinforce Hamilton’s market position in niche areas.** Agri-tourism and the culinary sector can particularly benefit from this approach. Events such as Feast of Fields<sup>55</sup> in BC are fully subscribed and have played a significant role in raising the profile of farmers, wineries, and restaurants, and in creating an appreciation for local foods.

## Hamilton – a meetings and conventions destination

Meetings and conventions are an important element of Hamilton’s tourism industry and have potential to generate a growth in overnight visits. The city is renowned for its hosting capability and this sector is a key market for future development (see Section 5). From the perspective of creating a great destination, it is recognized that Hamilton is now competing with cities that have much newer and more modern convention facilities. While minor cosmetic renovations have recently been completed in the Convention Centre, the venue lacks the overall design and finish of newer centres in Hamilton’s competitive set (London, Niagara Falls, Windsor, Sault Ste. Marie, Charlottetown, St. John’s, and Halifax). However, there are no immediate plans to develop new facilities and the current emphasis is on a collaborative approach to targeted marketing and the delivery of exceptional hosting experiences.

**Longer-term there is a need to give consideration from a planning perspective to the development of new facilities.** The size of conventions that can be hosted presently is constrained by hotel room space (700 branded rooms in the core, extending to 1,000+ suitable rooms when the surrounding area is included). As room capacity within the city grows, there may be a stronger argument for a new city core venue. Upward expansion of Jackson Square, a commercial office and retail space, has been identified as a possibility. This under-utilized city core area holds opportunity within the context of longer term redevelopment of the area.

**In the medium term, the potential opportunity to develop a full resort hotel with leisure and meeting facilities within the Piers 5 to 8 area should be tentatively pursued with the private sector – an initiative that will ultimately enhance the appeal of Hamilton as an M&C destination.** Ensuring that the venue has

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<sup>55</sup> Feast of Fields is a four hour wandering harvest festival – held in Metro Vancouver, Vancouver Island and the Okanagan. It brings together the best of the region’s chefs, farmers, vintners, brewers, distillers, and food artisans in a field or orchard setting, and is focused on local flavours and local food systems.

the latest meetings technology to facilitate virtual event attendance and the simultaneous hosting of multiple destination events will give Hamilton a new competitive advantage.

## Enabling growth within a great destination

In addition to the initiatives outlined in the preceding discussion, developing a competitive destination will be highly dependent on a number of enabling factors that will be fundamental to the industry's growth and success. In many cases City and regional policies and strategies<sup>56</sup> are in place to facilitate the advancement of these factors, although further momentum may be needed. Looking at these policies and strategic priorities through a tourism lens will assist in strengthening the rationale for further investment and progress, and may provide an alternative perspective on implementation.

The key factors are inter-related and include:

1. Maintaining a high quality vibrant and welcoming destination;
2. Strengthening the role of new technologies in destination management and the delivery of visitor experiences; and
3. Improving access to Hamilton and connectivity within the Hamilton area.

Each of these factors plays an integral role in the overall visitor experience and in the level of satisfaction; and together they have an impact on the length of stay, the level of spend, the likelihood of repeat visitation, and the probability of recommendation by word of mouth or social media.

Place attractiveness, the quality of the public realm and vibrancy are key factors in the growth of tourism. An attractive and well-managed physical environment that feels safe and welcoming and is animated on a regular basis will encourage longer stays. In the context of developing tourism, beautification and regeneration projects, the ongoing protection and refurbishment of historic buildings, the cleanliness of the streetscape, and maintaining a sense of safety all take on a new level of significance. [Understanding the dynamics of a happy city](#) and implementing policies that are designed to enhance conviviality and well-being will create a sense of buzz for the visitor every bit as much as the resident.

*Places that seem too sterile or too confusing can trigger the release of adrenaline and cortisol, the hormones associated with fear and anxiety. Places that seem familiar, navigable, and that trigger good memories, are more likely to activate hits of feel-good serotonin, as well as the hormone that rewards and promotes feelings of interpersonal trust: oxytocin.*

Montgomery, C., 2013, *Happy City*



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<sup>56</sup> For example, *Metrolinx Five Year Strategy 2012-2017*

A strong sense of place and an attractive destination instil a sense of welcome.

Enhancing this through well-located visitor information services, good directional signage and way-finding maps, and a culture of service excellence together provide a sound basis for helping the visitor feel at ease. *The innovative use of new technologies in way-finding, servicing information needs, and augmenting the interpretive experience will further strengthen Hamilton as a destination, and will require the preparation of a plan to direct their use.*

While facilitating way-finding is an important factor, *there needs to be an ongoing emphasis on improving all aspects of connectivity within and to Hamilton.* Areas to consider further include:

- Transit connectivity with the John C Munro Hamilton Internal Airport – (currently poorly promoted and no service on Sundays);
- Further integration between GO Transit and HSR systems to enable seamless travel;
- The use of the PRESTO card to access the Hamilton Bike Share program (SoBi) and to facilitate access to attractions with paid entry; and,
- The opportunities associated with the forthcoming improved rail link and the building of the new GO station – the Hamilton-LIUNA Mobility Hub – to be operational for the Pan Am Games.

Working on all of these enabling factors and tourism related initiatives has the potential to create a great destination – one that will have strong overnight market appeal and the ability to generate substantial economic benefit for the region. New businesses and strengthened operations will result in increased employment opportunities and the overall image of Hamilton will invariably improve.

### Talking Statues

A UK company, Sing London, has worked with writers and actors to produce a unique and engaging experience for cultural enthusiasts – introduced on the streets of London and Manchester in the fall of 2014.

*Walk past a statue (currently there are 27 across London and Manchester) and you can use any one of three really simple bits of technology via your smartphone to receive a call from the statue; either swipe your phone on a nearby NFC tag, scan a QR code or simply type in the tiny URL, your phone rings and...it's Joan of Arc on the line! Nothing needs to be downloaded and no apps are required ([Museums + Heritage](#))*

<http://www.talkingstatues.co.uk/>



## 7. Implementation and Summary of Action Areas

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A city-wide commitment to the vision and goals of this Strategy identified in Chapter 3 will contribute significantly to its successful implementation. While the Tourism and Culture Division of the City of Hamilton will take a lead in overseeing and supporting its implementation, progress will depend on all tourism stakeholders using the Strategy as a road-map for marketing, product development and investment decisions. The synergies to be gained from working together and an ongoing emphasis on the underlying principles of the Strategy can accelerate the level of progress and the likelihood of achieving the collective vision and goals.

### Hamilton Tourism Strategy – Underlying Principles

- Alignment with the City’s Strategic Plan, related municipal development strategies and local, regional and provincial tourism priorities;
- Leveraging of the city’s creativity;
- Celebration of Hamilton’s authentic legacies and people;
- Commitment to collaboration;
- Optimized use of the city's infrastructural resources; and
- Respect for the four principles of sustainability

### Promoting collaboration and sustaining momentum

Networking and regular shared discussions on the strategic priorities will be important in promoting a collaborative approach and sustaining the momentum that was generated by the planning discussions. The proposed new leadership elements, the Hamilton Tourism Partnership and the Steering Implementation Group will provide new opportunities for strategic dialogue and will play an important role in driving forward the process of implementation. In addition to these leadership elements, [it is recommended that T&CD oversee networking and communication activities that will fully engage the wider tourism industry in business development and implementation of this Strategy.](#)

Equally important to working collaboratively, is the need for a new funding model. The proposed DMP and the establishment of the Tourism Business Development Fund are critical to the growth of the industry and to raising the profile of Hamilton as a preferred destination for its markets with highest potential for return. Achieving a strong level of buy-in to the DMP across the accommodation sector and augmenting these funds through developing cooperative participation criteria for a range of stakeholders, and ensuring strong and ongoing financial support from the City of Hamilton are essential to building a solid tourism economy and a competitive destination.

The following tables present a summary of the key actions identified in this Strategy. They identify the partners responsible for the actions and provide an indicative timeline. Short term refers to year 1 of implementation; medium term refers to year’s 2 and 3; and, longer term refers to year’s 4 and 5, and beyond.

## Summary action plan

Strategic Priority 1: Leadership		
SPECIFIC ACTIONS	PARTNERS	TIMING
<p>Effective implementation of this Strategy will require strong leadership that brings together the public and private sectors at a senior level to facilitate the growth of tourism, and the identification of additional funding for business development and marketing.</p> <p>1. Establish new and strengthen existing elements of the new leadership model. This will include:</p> <ol style="list-style-type: none"> <li>a) T&amp;CD assuming a lead role in developing a more integrated approach to tourism development and promotion within the City of Hamilton, and in overseeing and supporting the implementation of this Strategy. This will involve: <ul style="list-style-type: none"> <li>• Restructuring the municipal tourism function to strengthen T&amp;CD's ability to facilitate the implementation of the strategic priorities outlined in the Strategy, including the measurement of progress.</li> <li>• Developing a Tourism Action Plan for the Division which is fully aligned with the Strategy.</li> </ul> </li> <li>b) Further developing the current concept of the Hamilton Tourism Partnership to be composed of industry leaders. The HTP will work in collaboration with the City to drive tourism business in the short and long term.</li> <li>c) Establishing the Strategy Implementation Group to provide a longer-term focus and to advise T&amp;CD staff on strategic direction and the implementation of tourism priorities identified in this Strategy.</li> <li>d) Maintaining the Tourism Advisory Committee and its existing mandate to advise Council on tourism matters.</li> <li>e) Recognizing the mutual interests between RTO 3 and T&amp;CD and strengthening working relations between the two partners.</li> </ol>	<p>T&amp;CD will take the lead in ensuring all elements are in place and have an understanding of their role.</p>	<p>Within first three months</p>
<p>2. Explore the options for establishing a new supplementary funding mechanism through:</p> <ol style="list-style-type: none"> <li>a) Assessing the feasibility of implementing the Destination Management Program.</li> <li>b) Implementing the DMP.</li> </ol>	<p>HTP with support from T&amp;CD</p>	<p>Short term</p>

## Strategic Priority 2: Marketing and Communications

SPECIFIC ACTIONS	PARTNERS	TIMING
<p><b>General</b></p> <ol style="list-style-type: none"> <li>1. Develop and implement an integrated marketing and communications plan that focuses on delivering the marketing and communications elements of this Strategy.</li> <li>2. Develop and maintain an Advanced Booking Calendar as an industry tool to track potential and actual scheduling of events, festivals, M&amp;C business, and sports related tournaments and activities for a forward-looking period of at least three years.</li> </ol>	<p>T&amp;CD with input from HTP</p> <p>T&amp;CD with input from HTP and all key stakeholders involved in events</p>	<p>Short term &amp; annually</p> <p>Short term</p>
<p><b>Meetings and Conventions</b></p> <p>M&amp;C sales and marketing will target organizations that align with Hamilton’s core assets and strengths. The sport, medical and educational sectors present opportunity in the national and Ontario-based associations market.</p> <ol style="list-style-type: none"> <li>1. Develop a collaborative approach to building M&amp;C business with an emphasis on city-wide bids.</li> <li>2. Develop a Hamilton Ambassador Program.</li> <li>3. Develop an effective tracking system to monitor the performance of all events-related business with all partners reporting progress.</li> <li>4. Build awareness of Hamilton as an events destination within target markets.</li> <li>5. Establish the Tourism Business Development Fund.</li> <li>6. Ensure that events are adequately serviced.</li> </ol>	<p>T&amp;CD will take the lead in marketing and sales activity – working in close partnership with HTP.</p> <p>Industry stakeholders will leverage and support the T&amp;CD / HTP activities</p>	<p>Short term and ongoing</p> <p>Medium-term (#s 2 &amp; 3)</p> <p>Short term</p>
<p><b>Sport Tourism</b></p> <p>With a focus on attracting regional, provincial, national and international events:</p> <ol style="list-style-type: none"> <li>1. Develop a comprehensive inventory of all sport facilities with particular emphasis on those suitable for major events.</li> <li>2. Review and update the 2005 <i>Sport Tourism Action Plan</i>.</li> <li>3. Develop a partnership-based approach to initiating and pursuing bids, and aim to secure two or three major sporting events each year with the emphasis on those that require capacity consistent with the city’s hotel room space.</li> <li>4. Work with partners to secure additional funds to support the bidding process.</li> <li>5. Use the major events of 2015 to develop a Visitor Services Plan for large sports and arts/cultural events.</li> </ol>	<p>TC&amp;D to take a lead.</p> <p>Partners include HTP, sport tourism sector, Recreation Div., Pan Am Host Committee, Juno Host Committee</p>	<p>Short term</p>

## Strategic Priority 2: Marketing and Communications

SPECIFIC ACTIONS	PARTNERS	TIMING
<p><b>Leisure market</b></p> <p>A pragmatic approach is needed with respect to the leisure market – one that is based on strategic segmentation, an enhanced use of digital marketing and close collaboration with RTO 3. The marketing will be targeted at three of provincial segments identified through the OTMPC market segmentation research – ‘Connected Explorers’, ‘Knowledge Seekers’, and ‘Youthful Socializers’, with a geographic focus on the near-in markets.</p> <ol style="list-style-type: none"> <li>Increase the use of digital channels for information distribution to the leisure market and implement a plan for digital marketing and social media. Undertake these activities in a way that will leverage RTO 3’s marketing efforts.               <ol style="list-style-type: none"> <li>Redevelop the destination website.</li> <li>Develop a Content Management Plan.</li> </ol> </li> <li>Develop a comprehensive understanding of the three priority leisure segments and the types of marketing and communications activity that will be most effective in influencing them.               <ol style="list-style-type: none"> <li>Refresh and expand the image library and stimulate user-generated content.</li> </ol> </li> <li>Develop online and offline collateral as new experiences and product are established.</li> </ol>	<p>T&amp;CD will take a lead in the digital marketing activities and will work in close partnership with RTO 3 to create alignment in leisure marketing activities.</p> <p>Partners in developing the Content Management Plan include RTO 3 and HTP</p> <p>T&amp;CD</p>	<p>Short term and ongoing</p> <p>The redevelopment of the website – medium term</p> <p>Medium term</p>

## Strategic Priority 3: Destination Development

SPECIFIC ACTIONS	PARTNERS	TIMING
<p>In creating a great destination and enhancing Hamilton’s welcome, the essential objective is to get people to stay as long as possible, engage fully in leisure and related business activities, and enjoy the city urban and rural areas to the maximum.</p> <p>The focus is on strengthening Hamilton’s distinctive attributes – particularly the arts, culture and entertainment cluster.</p>		
<p><b>James Street Corridor Project</b> – based on the concept of a corridor length visitor experience from the waterfront to the Niagara Escarpment.</p> <p>Develop and implement a Corridor Concept Plan based on the following:</p> <ol style="list-style-type: none"> <li>Developing the overall positioning.</li> <li>Selecting 3-4 themes that capture the corridor’s significance.</li> <li>Undertaking a comprehensive audit from the perspective of the visitor.</li> </ol>	<p>This project will involve all units within T&amp;CD</p> <p>Supporting partners: P&amp;ED Department; (will take the lead on</p>	<p>Medium to longer term</p>

Strategic Priority 3: Destination Development		
SPECIFIC ACTIONS	PARTNERS	TIMING
<p>4. Leveraging the Gore Pedestrianization Plan to create a central hub area.</p> <p>5. Addressing walkability and legibility issues and opportunities.</p> <p>6. Creating strong and attractive waterfront and escarpment destination elements – and developing a tourism investment attraction strategy.</p> <p>7. Positioning and developing the Visitor Centre as the central showcase and information hub for the corridor experience.</p> <p>8. Creating new experiences and animating the corridor – including developing an interpretive plan.</p> <p>9. Addressing factors that support a strong and positive ambiance, including land-use planning, heritage conservation and enhancement of the public realm.</p>	<p>elements);</p> <p>BIAs;</p> <p>James Street North businesses</p> <p>HSR</p> <p>Hamilton Waterfront Trust</p>	
<p><b>The waterfront</b></p> <p>Ongoing implementation of the <i>Hamilton West Harbour Waterfront Recreation Master Plan</i> and the <i>Setting Sail Secondary Plan for West Harbour</i>.</p> <p>1. Undertake feasibility analysis for the development of a full resort hotel with leisure and meeting facilities within the Piers 5-8 area.</p> <p>2. Ongoing development of a range of amenities to create an effective micro-destination on the waterfront.</p> <p>3. Encourage key players to work collaboratively in presenting the waterfront as a micro-destination.</p>	<p>TP / PW Department</p> <p>HWT (lead for overall capital project)</p> <p>T&amp;CD to play a role in facilitating cross-departmental meetings</p>	<p>Longer term</p>
<p><b>Leveraging the strengths of the region</b></p> <p>The emphasis needs to be on identifying ways of using nature-based and agri-based activities and attractions to increase length of stay, complement the James Street Corridor and waterfront experience, and attract niche markets.</p> <p>1. Guided tours – focusing on themed tours on agri-tourism, ecotourism, and soft adventure, and tours that build on the James Street Corridor experience and the interest in arts, culture, heritage, steel town history and architecture.</p> <p>2. Ecotourism and soft adventure – the development of new experiences and the potential to add value to existing products; the development of innovative itineraries and opportunity to build unique packages.</p> <p>3. Trails – continue with the implementation of the <i>Hamilton Recreational Trails Master Plan</i></p> <p>a) Develop online database-driven tools to assist visitors in trip planning</p>	<p>T&amp;CD to work with other relevant City departments and facilitate discussion with partners such as RBG, HCA and HCF</p> <p>Implementation of existing plans remains the responsibility of the agency/department who commissioned the plans</p>	<p>Medium to longer term</p>



# Appendix

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## Acronyms

BIA	Business Improvement Area
CMS	Content Management System
CRM	Customer Relationship Management system
CSAE	Canadian Society of Association Executives
DMF	Destination Marketing Fee
DMO	Destination Management and Marketing Organization
DMP	Destination Marketing Program
GTA	Greater Toronto Area
HCA	Hamilton Conservation Authority
HCF	Hamilton Conservation Foundation
HSR	Hamilton Street Railway Company, City of Hamilton
HTP	Hamilton Tourism Partnership
iDSS	Internet Destination Sales System
M&C	Meetings and conventions
MPI	Meeting Professionals International
OTMPC	Ontario Tourism Marketing Partnership Corporation
ORHMA	Ontario Restaurant Hotel Motel & Association
P&EDD	Planning and Economic Development Department, City of Hamilton
PWD	Public Works Department, City of Hamilton
RevPAR	Revenue Per Available Room
ROE	Return on emotion
ROI	Return on investment
RTO 3	Regional Tourism Organization 3: Hamilton Halton Brant Regional Tourism Association
RBG	Royal Botanical Gardens
T&CD	Tourism and Culture Division, City of Hamilton
TAC	Tourism Advisory Committee, City of Hamilton
TP / PWD	Transportation Planning / Public Works Department, City of Hamilton
VFR	Visiting friends and relatives
WT	Waterfront Trust

## DMP imperatives

In establishing a Destination Marketing Program, the emerging Hamilton Tourism Partnership must consider the following list of imperatives<sup>57</sup>.

1. **Establishing industry leadership at arm's length to the City of Hamilton** – in most cases DMP funds are collected by a third party entity that is not part of the destination marketing or management organization, as funds cannot be collected by the municipality. The creation of this third party entity tends to be led by a destination's tourism industry leaders. These are typically individuals who understand the merits of a DMP, and are motivated to enhance the overall appeal and competitiveness of the destination through the creation of a mechanism to collect additional tourism development and marketing resources. In Toronto that entity is the Greater Toronto Hotel Association; in Kingston it is the Kingston Accommodation Partners; and in several communities it is the Ontario Restaurant Hotel & Motel Association (ORHMA). Most of these organizations are at arm's length from the DMO. They are incorporated organizations established for the sole purpose of collecting a DMP, or collection of a DMP is one of many things they do on behalf of the tourism industry. In the majority of cases they collect and then flow the funds to the established DMO.
2. **Voluntary participation** – a DMP generally involves the voluntary engagement of the destination's commercial (roofed) accommodations operators. In some cases attractions are included and contribute to a DMP on the basis of attendance or an agreed upon contribution (e.g. Kingston's Fort Henry and 1000 Island Boat Cruises). The goal is to engage the broadest possible participation among accommodators as this will not only increase the level of funding, but it will also generate a greater level of stakeholder engagement in destination-based development and marketing. The marketing levy is passed on to a third party organization at predetermined intervals. These participants may take a role in influencing how funds are spent through a nominated committee, and will have an opportunity to monitor and influence governance and accountability on the basis of an agreement with the DMP third party.
3. **Accountability and transparency** – the collection of funds implies a level of accountability and transparency in several key areas.
  - a. The visitor must understand that the fee is a voluntary levy and not a tax. Fees should be communicated clearly in associated advertising to ensure that actual costs are not misrepresented in any way to the customer.
  - b. The DMP process must have a clear consensus among participating members over how they will collect and remit the fee, how the funds will be managed, and how potential confidential information on their own facilities and properties will be safeguarded.
  - c. Transparency and accountability should extend to various federal and provincial agencies. The fund, while not legislated, may have regulatory considerations in relation to taxation and competition and absolute clarity is required.

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<sup>57</sup> This list of imperatives has been adapted from work done by Independent Consultants Group on behalf of the Western Newfoundland Tourism Destination Management Organization.

4. ***Governance and administration*** – the DMP process involves the establishment of a formal governance and administrative structure. Key requirements for fund management include detailed business procedures, accounting, reporting and financial administration; and, in certain instances, staffing resources to facilitate administration and implementation of strategic goals and priorities of the DMP. There are instances of DMPs partnering with existing organizations to meet planning, financial administration and accountability requirements, with authority placed in the hands of a trusted external partner or trustee. As mentioned, ORHMA performs this role for several Ontario destinations.
5. ***Importance of trust and clear strategic direction*** – the initiation of a successful DMP is based on two critical factors. Firstly, there must be a level of trust among operators within the destination which leads to a willingness to participate in a DMP. Secondly, there must be a clear consensus on how the resources will be utilized and who will be responsible for developing and marketing the destination against a set of agreed upon goals and strategies. Trust and participation will flourish if there is confidence in the entity entrusted with spending the resources collected, and identified goals are met. In addition, there needs to be a critical mass of operators participating in the DMP.

In establishing strategic priorities, there should be broad stakeholder engagement beyond the accommodation sector. While accommodators are key to the success of the program as they offer the most convenient way of collecting a levy on visitors, it is the entire destination experience that determines the appeal of the destination. This includes attractions, historic sites, convention and sports venues, restaurateurs, retailers, arts organizations, regional tourism associations, and local government.

While there may be additional imperatives to be considered, this list forms the basis of successful DMP initiation. Within an Ontario context there are many examples of DMP implementation. As Hamilton considers the creation of a DMP the industry would be well served if they sought out further guidance and expertise on the topic before proceeding too far down the road of inception and implementation.

## Photograph and image credits

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