

WINDSOR, ESSEX COUNTY & PEELEE ISLAND

A Premier-ranked
Tourist Destinations
Evaluation



Développement des
ressources humaines Canada

Human Resources
Development Canada

Canada



WINDSOR
ESSEX COUNTY
& PEELEE ISLAND
CONVENTION &
VISITORS BUREAU

WINDSOR, ESSEX COUNTY & PEELEE ISLAND: A PREMIER-RANKED TOURIST DESTINATIONS EVALUATION

Prepared for:

The City of Windsor, Essex County & Pelee Island

Prepared by:

Mary-Jo McKinnon, Project Coordinator

Kevin Lorenz, Researcher / Product Developer and Writer

Corey Thompson, Writer

Simone Catherine, Administrative Assistant

Paul Forbes, Researcher / Product Developer

Sophia Ally, Researcher / Product Developer

With the assistance of:

Paul Samson – Tourism Development Consultant, Ontario Ministry of Tourism and Recreation

Gordon Orr – Managing Director, Windsor, Essex County & Pelee Island Convention & Visitors Bureau

Elizabeth Hamel – Former General Manager, Windsor, Essex County & Pelee Island Convention & Visitors Bureau

A List of Committee Members Who Actively Participated in the Premier-ranked Tourist Destinations Project

ADVISORY COMMITTEE

Burridge, Lloyd – Parks & Recreation Department, City of Windsor
Dunbar, Mike – Corporate Services, City of Windsor
Genik, David – Windsor-Essex County Development Commission
Hamel, Elizabeth – Windsor Essex County & Pelee Island Convention & Visitors Bureau
Kelch, Stuart – County of Essex
Kettenbeil, Ken – Detroit Metro Convention & Visitors Bureau
King, Bill – County of Essex, County Planner
McAninch, Al – Township of Pelee
Orr, Gordon – Windsor, Essex County & Pelee Island Convention & Visitors Bureau
Sadler, Don – Parks & Forestry Services
Samson, Paul – Ministry of Tourism, Culture and Recreation
Schmidt, Ken – Essex Region Conservation Authority

COMMITTEE MEMBERS

Baker, Bill – Windsor Airport
Beaucage, Terry – Radisson Riverfront Hotel
Beaulieu, Vicki – Belle River BIA
Branton, Michael – Branteaney's Bed & Breakfast
Breault, Danielle – Essex Region Conservation Authority
Burch, Larissa – City Centre Business Association
Chopchik, Chris – Leamington & District Chamber of Commerce
Cobban, Janet – Windsor's Community Museum
DeLuca, Kristy – Town of Amherstburg
Durocher, Ray and Louise – Island Memories B & B
Funaro, Fran – City Centre Business Association
Gelinas, Tom and Linda – The Wedding House B & B
Genik, David – Windsor-Essex County Development Commission
Gnyp, Dina – Terra Cotta Pizzeria
Hansen, Svenja – Point Pelee National Park
Hawrish, Richard – LCBO – Roundhouse Centre
Lawrence, Julie – Windsor Wood Carving Museum
LeBlanc, Paul – St. Clair College
Longo, Julie – St. Clair College
Ossington, Rita – Canada South Festival Network
Porcellini, Shannon – Ford City Discovery Centre
Reed, Friede – Ford City Discovery Centre
Scheuerman, Bridget – Wyandotte Towne Centre BIA
Tofflemire, Diane – Seaclyffe Inn
Vourakes, Mike – St. Clair College
Wilson, Jan – Parks & Recreation Department, City of Windsor

ABSTRACT

This report evaluates whether or not Windsor, Essex County and Pelee Island is a Premier-ranked Tourist Destination, or in other words, whether it is a region that “the potential tourist should consider first in making travel plans.”¹ The region was evaluated on the following overall criteria and their accompanying sub-sections as set forth in *Premier-ranked Tourist Destinations: A Self-guided Workbook*:

Product:

- a) Distinctive Core Attractions
- b) Quality and Critical Mass
- c) Satisfaction and Value
- d) Accessibility
- e) Accommodations Base

Performance:

- f) Visitation
- g) Occupancy and Yield
- h) Critical Acclaim

Futurity:

- i) Destination Marketing
- j) Product Renewal
- k) Managing within Carrying Capacities

In order to be classified as Premier-ranked, a destination must receive Premier-ranked, or exceptional, ratings in both Product and Performance and Premier-ranked ratings in at least two of the three sub-sections (Destination and Marketing, Product Renewal, and Managing with Carrying Capacities) within Futurity. A visual representation of the rating system and the region’s results can be seen in the Performance Summary in Appendix One.

In the initial stages of the project, surveys were sent to more than 800 potential tourism experience providers in the Windsor, Essex County and Pelee Island area. This number was shortened to 600 after duplicates, closures, and regionally oriented establishments were discounted. After the data was returned and subsequently entered into the Workbook, Windsor, Essex County and Pelee Island received strong ratings on the Product, Performance and Futurity Dimensions.

Given the destination’s close proximity to Metro Detroit, a separate chapter has been included examining the opportunities for cooperative marketing with, and the magnitude of the competition from, the Metro Detroit tourism experience. The final chapter details the relative strengths and weaknesses of Windsor, Essex County and Pelee Island’s tourism sector as well as makes several recommendations to improve the sector’s product, performance and futurity.

¹ Investment and Development Office, Ministry of Tourism, Culture and Recreation, *Premier-ranked Tourist Destinations: A Self-guided Workbook*, i.

INTRODUCTION

What is the Premier-ranked Tourist Destinations Project?

The Premier-ranked Tourist Destinations Workbook was developed for the Investment and Development Office of the Ministry of Tourism and Recreation in 2001. The Workbook is designed to “guide its users through an assessment of a tourist destination’s market status.”¹ The primary goal of the assessment is to evaluate whether a destination is Premier-ranked, which is defined as being “a place more attractive than the rest, a place the potential tourist should consider first in making travel plans.”² Regardless of whether or not a region is considered to be Premier-ranked, the assessment involved in the Workbook would provide valuable information to any tourist destination.

The Workbook is divided into three dimensions, which are in turn divided into a total of 11 elements. Each of the elements is further supported by criteria and performance measures. These measures have been incorporated virtually unchanged into this report and form the basis of the evaluation it contains. The Ministry was provided with a testing of the Premier-ranked evaluatory framework by assessing the South Georgian Bay region in a January 2001 report. This was the only time that the Premier-ranked Tourist Destinations Workbook had been successfully completed until the assessment of Windsor, Essex County and Pelee Island was launched in early 2002.

Why Windsor, Essex County and Pelee Island?

The Windsor, Essex County and Pelee Island region is a growing tourist destination. The favorable U.S. exchange rate lures many visitors from the Midwestern states in general and Michigan and Ohio in particular. Casino Windsor and a strong food and beverage sector have fueled strong growth in American visitation in the last ten years. In order to evaluate the strengths and weaknesses of the tourism sector, the Convention & Visitors Bureau of Windsor, Essex County & Pelee Island (CVB) contracted with Human Resources Development Canada (HRDC) to place five participants in the Job Creation Partnership³ at the CVB for the purpose of completing the Premier-ranked Tourist Destinations Workbook. Three product developers/researchers, a project coordinator and an administrative assistant were placed in May 2002 to begin the project. Two writers were placed in January 2003 to assist the project coordinator and the administrative assistant in completing this final report.

Research Team & Responsibilities

The Premier-ranked Tourist Destinations Project for the Windsor, Essex County and Pelee Island region was completed by project coordinator Mary-Jo McKinnon, researcher/product developers Paul Forbes, Sophia Ally, and Kevin Lorenz, and writer Corey Thompson. The project staff members were aided by administrative assistant Simone Catherine, and benefited greatly from the guidance of Gordon Orr, Managing Director and Elizabeth Hamel, former General Manager of the Windsor, Essex County & Pelee Island Convention & Visitors Bureau; and Paul Samson, Tourism Development Consultant for the Ontario Ministry of Tourism and Recreation.



The initial phase of the research involved creating a set of surveys to gather information from tourism experience providers in several categories: Food and Beverage, Accommodation, Festivals and Events, Attractions, Transportation, Marinas, Golf Courses, Tour and Cruise, Campgrounds and Adventure. The CVB organized a series of committees to assist in the Premier-ranked project, an Advisory Committee to offer guidance on the overall direction of the project, and four committees to assist in specific areas of research: Food and Beverage, Attractions, Accommodation, and BIAs and Chambers of Commerce. The project staff met with the Advisory Committee in May 2002 for initial guidance and began working on the survey phase the next week. The project staff drafted an initial list of over 800 potential tourism experience providers. This list was then narrowed down to 600 after duplicates, closures and regionally oriented establishments were discounted. Surveys were mailed out in August and September of 2002. After follow-up and secondary research, the information from the surveys formed a massive database that is the basis for much of the information in this report. Over 90 percent of the surveys were completed by the end of the survey phase in November, 2002.

¹ Investment and Development Office, Ministry of Tourism, Culture and Recreation, *Premier-ranked Tourist Destinations: A Self-guided Workbook*, i.

² *ibid.*

³ This is an Employment Insurance (EI) program designed to provide work experience for current and former recipients of EI benefits. HRDC also provided much of the funding for this project, with the CVB providing the rest, in particular in-kind support such as phones and office space.

At this point, the project staff used the information to create a list of **core** and **supporting attractions** in Windsor, Essex County and Pelee Island that was approved by the Advisory Committee. The next step was to create summary reports of the various areas surveyed and present these reports to the relevant committees for review and feedback, which was completed in January 2003. From January to March of 2003, the Premier-ranked Tourist Destinations Project staff completed the Workbook and the report, with the valuable input of the advisory and stakeholder committees. The final report was delivered to the CVB in April of 2003. The completed Workbook is included as Appendix One of this report. Destinations that are interested in undertaking the Premier-ranked Tourist Destinations project are encouraged to obtain a copy of the Workbook from the Ministry of Tourism and Recreation.

Any facts or statistics used in this report are from the Workbook, unless otherwise cited. Any examples used in the Workbook are cited in no particular order. This final report is intended to guide and inform discussions regarding tourism planning and development in the Windsor, Essex County and Pelee Island area. We hope that it leads to positive and progressive change in the tourism sector. Throughout the report, certain terms will appear in **bold type** to remind the reader that a definition is available in the glossary at right. Finally, the terms “tourist,” “visitor” and “guest” are used interchangeably throughout the report.



GLOSSARY

Attraction: An attraction is defined as either a natural site or one that is built/managed. Attractions aim to provide entertainment and/or education to those who visit it.

BIA: Business Improvement Area – Marketing and promotional organization devoted to targeting high-traffic business and retail districts for commercial investment and small-business opportunities.

Branded: A term used to describe something that has a widely known or “brand” name, and a highly respected reputation.

Chamber of Commerce: A group that represents businesses in a given geographic area.

Core activities: Tourists’ activities as they interact with a destination’s **core attraction(s)** to create **core experiences**.

Core attraction: The feature(s) and/or facility(ies) that act as the primary motivators for travel to the destination, or the attractions with the most tourist visits in the destination. Core attractions may differ from season to season. They may also overlap, or be distinctly different for differing visitor segments. Also known as primary trip motivators.

Core experience: The guest’s experience of the **core attraction**.

CTC: Canadian Tourism Commission, the national marketing body for tourism in Canada.

DMO: A Destination Marketing Organization – a generic term for any agency with a mandate to promote and develop tourism in a geographic area.

ERCA: Essex Region Conservation Authority.

Event: An event is a gathering of people held at a regular interval (usually annually) for the purpose of entertaining those in attendance and generating revenue for the promoters of the event. This means that neither sales or promotional campaigns nor one-time sports or cultural events are considered events for the purpose of this project.

FAM: Familiarization Tour.

FEO: Festivals and Events Ontario, an association to represent festival and event organizers in Ontario.

Festival: A festival is an event that calls itself a festival.

FIT: Fully independent traveler.

High quality tourist experience: A travel experience that exceeds the guest's expectations.

HRDC: Human Resources Development Canada.

Memorable tourist experience: A satisfying travel experience that lasts in the guest's memory, typically because he or she was engaged in a deep and lasting (i.e., out of the ordinary) manner by experiencing the destination. A **high quality tourist experience** will be memorable for all of the right reasons.

Niche segments: Smaller market segments with a travel-motivating interest in a particular type of experience. For example, a specific interest in good boardsailing opportunities versus the mass-market interest in a more generic sun and sand destination.

On-theme activities: Activities that are related to the **core attraction**.

OTEC: Ontario Tourism Education Corporation.

OTMP: Ontario Tourist Marketing Partnership – The partnership between the provincial government and the tourism industry responsible for marketing tourism in and to Ontario.

Product positioning statement: A brief description of what a product or service does, and its benefits using terms that set it apart from its competitors.

Ramsar Convention: An intergovernmental treaty that provides the framework for national action and international cooperation for the conservation and wise use of wetlands and their resources. Signed in Ramsar, Iran, in 1971.

Regional complex: A term describing the situation in which individual tourism resources in an area are not sufficiently attractive to draw significant tourist visitation by themselves, but as a group attract visitation by virtue of complementing one another and creating a larger whole.

Supporting attraction: Features or facilities that draw guests to the destination area by offering additional but secondary reasons to travel there; they complement the primary trip motivators. Supporting attractions can be primary travel motivators to some markets.

VFR: Tourists who visit a region for the purpose of "visiting friends and/or relatives" – an important motivator for tourism travel. It also highlights the importance of marketing to local and regional residents.



PRODUCT

The Product elements for the Premier-ranked Tourist Destinations Project are aimed at identifying the extent to which the destination offers a high-quality tourist experience. For this purpose, the region will be assessed on the following Product criteria: Distinctive Core Attractions, Quality and Critical Mass, Satisfaction and Value, Accessibility, and Availability. The region's overall Product rating was derived by amalgamating the individual Product criteria's results. After detailed consideration, Windsor, Essex County and Pelee Island's Product base is Premier-ranked.

Core and Supporting Attractions

As determined by the Premier-ranked Tourist Destinations Project's staff, the Windsor, Essex County and Pelee Island region offers a wide range of both **core** and **supporting attractions**, many of which are intrinsically linked to the region's physical and historical setting. The core attractions, or primary trip motivators, that are located in the City of Windsor are as follows: gaming (Casino Windsor, Windsor Raceway and Slots, and bingo halls), festivals (Freedom Festival, Festival Epicure, and Bluesfest International), shopping (Devonshire Mall, Freeds of Windsor, prescription drugs, liquor and wine), the culinary experience, the downtown club experience, the Canada experience, boating and marinas, angling, and the region's numerous parks (Jackson Park, Coventry Gardens, Odette Sculpture Park, and Dieppe Gardens). The county's **core attractions** are Fort Malden National Historical Site, Colasanti's Tropical Gardens, birding events such as the Festival of Hawks and Festival of Birds, Point Pelee National Park, Pelee Island, the Underground Railroad, estate wineries, Windsor Crossing Premium Outlets, boating and marinas, and angling. Many of these **core attractions**, such as birding, Point Pelee National Park, Pelee Island, wineries, boating, and marinas and angling, are linked to the region's physical setting. Other attractions, such as Fort Malden National Historical Site, Point Pelee National Park, and the Underground Railroad, are linked to the region's history. These core attractions motivate tourist travel to Windsor, Essex County and Pelee Island on their own, as opposed to functioning as a part of a **regional complex**.

The region also offers an abundance of **supporting attractions** that complement the primary trip motivators. In Windsor, the **supporting attractions** are the Pride of Windsor Cruises, the Windsor Community Museum, the Art Gallery of Windsor, the Canadian Club Heritage Center, Walker's Fine Candies, furniture shopping, and the theatre and performing arts community. The county's **supporting**

attractions are Southwestern Ontario Heritage Village and Transportation Museum, Amherstburg gardens, Gibson Gallery, Lighthouse Cove, Fujisawa Zen Gardens, the Essex Railway Station, golfing, and the Jack Miner Bird Sanctuary. Given the region's proximity to Michigan, the Detroit experience is also a **supporting attraction**.



Although the region offers a comprehensive attractions base, one related area that clearly requires improvement is the availability of core and on-theme attractions for advanced purchase. With the notable exception of motor coach tour packages, the region's products are not generally accessible, or easy to buy, in advance of a trip. The lack of prepackaged tours may be costing the region a large number of potential tourists and increased revenue.

Although the region has a substantial number of core and **supporting attractions**, opportunities to build on complementary tourist venues with nearby destinations have still been assessed and explored. The Windsor, Essex County and Pelee Island CVB has launched cooperative marketing campaigns with CVBs in Metro Detroit, Chatham-Kent, and Peterborough. Marketing initiatives include the Two-Nation Vacation, the Underground Railroad, and carp fishing packages. The Chatham-Kent and Windsor, Essex County and Pelee Island CVBs also cooperate on familiarization tours and sales calls.

Windsor, Essex County and Pelee Island is in the difficult position of competing for tourists with other destinations that offer similar attractions. In many instances, its competition is major metropolitan markets. Toronto (400 km), Niagara Falls (420 km), London (200 km), Detroit (10 km), Toledo (60 km), and Sandusky (200 km) are all

attempting to attract tourists from the same market as Windsor, Essex County and Pelee Island. The region is unique from its competitors by virtue of having an American metropolis in close proximity. Likewise, American visitors can take advantage of the favorable exchange rate and the region's urban areas, which are generally cleaner and safer than American cities. The region also offers superior attractions such as birding, gaming, and the downtown club experience, all of which are specifically geared toward the individual visitor's expectations.



Windsor, Essex County and Pelee Island is marketed by various local businesses as “the southern most point in Canada,” or, more specifically to Windsor, as “Canada’s southern most city.”¹ It is the only Canadian city, in fact, in which visitors can look north to the United States. Although further and official branding exercises are currently underway, these promotional statements are excellent examples of the region’s attempts to market itself as unique from its competitors. The various **core and supporting attractions** that the region provides also demonstrate that visitors are offered memorable experiences that are distinct from those of its competitors. Specific niche markets such as birding and mass markets including shopping are available to the visitor.² Attractions such as gaming, which have elements of both niche and mass markets, are also widely available.³ Arguably, the region’s biggest shortcoming in terms of Product is the lack of a year-round family-oriented attraction that would counteract the largely adult-oriented attractions such as gaming.

Quality and Critical Mass

Windsor, Essex County and Pelee Island provides visitors with a memorable experience by generally offering a broad and deep range of options for engaging in such areas as core and related attractions, entertainment, and shopping and dining. Unfortunately, most **core attractions** can be “consumed” over a period of less than 24 hours (gaming, shopping, and park experiences are normally completed in a matter of hours).⁴ Perhaps not surprisingly then, the average visit’s duration is also less than 24 hours. Despite the brevity of stay, however, the region has a significant potential for frequent repeat visitation as it offers **core and supporting attractions** on a year-round basis. Marketing such additional attractions more effectively may entice visitors to remain in the region for a longer period of time, thereby increasing the possibility of overnight visitation.

In addition to the abundance of **core and supporting attractions**, the region offers a wide variety of market segments at a range of price points. Relaxation (spas, cruises, parks), entertainment (nightclubs, symphony, theatre), interpretation (bird-watching, walking), education (Jack Miner’s, Art Gallery of Windsor, Fort Malden National Historic Site, Common Ground Gallery), cultural/historical understanding (Fort Malden National Historic Site, area museums), skills development (Art Gallery of Windsor), and adventure (scuba diving, sailing, birding, and kayaking) are all available to tourists at a variety of price points.

These activities are well promoted in Windsor, Essex County and Pelee Island. The CVB distributes 175 000 Visitor Guides and maps and 100 000 lure brochures⁵ annually, as well as offers a highly modern Web site, www.visitwindsor.com, and a 1-800 number. Visitors to the CVB offices or to the Tourist Information Kiosk in Casino Windsor can obtain pamphlets and information about member businesses. In total, the CVB spent \$937 180 in 2002 on promoting tourism activities in the area.⁶ The Canada South Festival Network promotes awareness of festivals and events in the area as well. It issues an annual Festivals and Events brochure that lists and describes its member festivals/events. It also hosts the Web site www.canadasouthfestivals.com, which provides updated information on these member festivals/events. Several other Web sites exist to provide information on the food and beverage sector, both in Windsor, Essex County and Pelee Island and in Metro Detroit.

Despite being so well promoted by local agencies, the region’s range of **core and supporting activities** are not

¹ Such advertisements are most notable on the products sold by the region’s souvenir shops.

² These figures exclude same-day auto visitation.

³ Total figures for gaming are not available; however, Casino Windsor alone attracted 2 030 000 visitors in 2001, again excluding same-day auto visitation.

⁴ Possible exceptions include the Pelee Island experience and Birding.

⁵ Windsor, Essex County & Pelee Island CVB, 2002 Marketing Plan, 28.

⁶ Windsor, Essex County & Pelee Island CVB, 2002 Marketing Plan, 29.

easy to buy. Most **core and supporting attractions** only sell access and layers of added value at the point of entry. This is inconvenient for visitors who want to purchase an all-inclusive package from a point distant to the destination. Visitors would be more likely to purchase additional layers of added value if it were easier for them to do so.



One of the region's most impressive activities is that groups have cooperatively invested in programming or animating public spaces and queuing areas. The Ford City BIA, for instance, has undertaken a beautification project in the Drouillard Road area of Windsor. The Canada South Festival's downtown Bright Lights Festival, the Kingsville BIA's Kingsville Fantasy of Lights, the Erie Street BIA's "streetscaping," and the development of the Odette Sculpture Park along the riverfront parks in Windsor are also excellent examples of such endeavors.

Windsor, Essex County and Pelee Island also offers significant cultural experiences and entertainment options. Throughout the year, there are numerous cultural festivals such as the Carrousel of Nations, Festival Epicure, Expo: A Multicultural Festival, the International Freedom Festival, the Native Cultural Dance Exhibition, and Oktoberfest. Prices for these events vary substantially from \$0.00 to \$60.00 per person. The region is also a frequent destination for world-renowned performers and artists. Over the past two years, such entertainers as Michael Bolton, Julio Iglesias, Blues Traveler, Jann Arden, and Stompin' Tom Connors have performed at the Chrysler Theatre, Bluesfest International, and Migration Hall.

Windsor, Essex County and Pelee Island's food and beverage sector contributes strongly to the region's overall experience for visitors. It offers breadth and depth of selection in excess of what would be expected of a region of this size.

Specifically, there were 39 Italian, 14 Chinese, 16 fine dining/steak, 8 seafood, 5 Greek and 23 other ethnic restaurants surveyed as part of the survey phase of this project. There are clusters of restaurants, bars and nightclubs along Ouellette Avenue and Italian restaurants and coffee bars along Erie Street. A smaller range of establishments exist in the secondary destinations in Windsor, as well as the major towns of Essex County (other than the bedroom communities of Tecumseh and LaSalle). From higher-end restaurants such as Il Gabbiano or Elaine Bistro, where the average dinner for two is \$60.00-\$80.00, to one of the many fast food restaurants, visitors will be able to discover their ideal dining experience. Over 40 of the area's restaurants, including the Alan Manor Restaurant, Il Posto Ristorante, Duffy's Tavern and the Vintage Goose, have accredited or trained chefs, and many of the restaurants have name recognition beyond this region (the Alan Manor Restaurant, Tunnel Bar-B-Q, and the Vintage Goose, for instance). Many of the region's restaurants also offer comprehensive wine lists. Those with a minimum of 25 labels include Spago Ristorante (60), Casino Windsor's Riverside Grille (75), Thirteen Russell Steakhouse (40), and the Alan Manor Restaurant (105).

Considering that shopping is one of the region's **core attractions**, it should come as no surprise that there exists a range of retail shopping opportunities at a range of price points. Freeds of Windsor and Windsor Crossing Premium Outlets, for instance, provide high-end quality merchandise, whereas stores including Pier-1 Imports, Wal-Mart, and Sears offer medium-quality merchandise. Lower-end merchandise can also be found at any of the region's numerous dollar stores. Several stores in the area have name recognition beyond the local region, including Sears, the Bay, Wal-Mart, Old Navy, Pier-1 Imports, the LCBO, and Windsor Crossing Premium Outlets.

Satisfaction and Value

Visitors to Windsor, Essex County and Pelee Island are extremely satisfied with the quality and value provided by the region's attractions, as shown by regular surveys that track guest satisfaction and their perceptions of value and hospitality. As the Windsor, Essex County and Pelee Island CVB's 2001 *Visitor's Information Survey* attests, an overwhelming 97 percent of visitors stated that they would definitely visit the region again, a 3 percent increase over the 2000 survey. The Canada South Festival Network also conducts an annual survey of visitors to its member festivals, as well as distributes a survey in its annual *Festivals and Events* guide. The results of this survey have yet to be

released. Perhaps one of the reasons behind the tremendous satisfaction is the favorable U.S. exchange rate. This undoubtedly provides American visitors with an enticing reason to visit the region. Another reason is that many of the region's attractions, such as Point Pelee National Park, the downtown club experience, and the gaming facilities, offer visitors an experience unique to the Windsor, Essex County and Pelee Island region.

Patrons regard many of the area's destinations, such as shopping malls and food and beverage establishments as "good value" or "expensive but worth every cent." Although only some key experience and service prices are monitored, the general indication is that they are flat or trending upwards. Visitation to the region, however, is not. The September 11 terrorist attacks have devastated the region's tourism industry and the visitation figures have not returned to the pre-attack levels. The slowing U.S. economy and the war with Iraq have limited tourist visitation across North America, including this region. Yet on a more positive note, 2002 visitation figures indicate a slight increase over those of 2001.

Accessibility

The Windsor, Essex County and Pelee Island region is ideally situated within proximity to an abundant potential tourist market. Approximately 4.6 million people reside within a one-hour drive; 25 million people live within three hours. In fact, 50 percent of North America's population lives within a one-day drive of the region. Windsor, Essex County and Pelee Island is also readily accessible through a variety of transportation options. Detroit's two airports are no more than an hour's drive from the region. Visitors requiring subsequent transportation from the airport to Windsor can choose from automobile rentals, taxicabs, and transportation shuttle services. Windsor Airport, offering nonstop flights to such Canadian cities as Calgary, Winnipeg, and Toronto, is located on the outskirts of Windsor. For those visitors driving from their point of origin, the Ambassador Bridge and Windsor-Detroit Tunnel provide direct access from I-75 and I-96, while Highway 401 provides provincial travelers direct access to the region. During the long boating season, boaters can also take advantage of the region's 612 transient slips. Although most of them are located in the county, the slips are close to such core attractions as Fort Malden National Historic Site, Point Pelee National Park, and the seven area wineries.

Use of these facilities, however, has become less frequent for American, more specifically Michigander, boaters. As a result

of the post-September 11 security crackdown, Michigan boaters are required to provide a thumbprint as part of the I-68 Canadian Border Boat Landing Program. Due to the more stringent reporting requirements involved with this program, an overwhelming number of local marinas have reported dramatic declines in revenue and American visitation. Low-risk recreational boaters also view the onerous reporting-in procedures as a deterrent to future visits to the region. In addition to transient boats, there is also the potential for cruise ships to use the region as a destination as Dieppe Park offers a docking facility with 8.22 meters of draft and 304 meters of dock wall. More advanced facilities would need to be built at this site, however, before the true potential of cruise ship visitation can be realized in Windsor. All of these transportation options make the region readily accessible to the abundant tourist market that surrounds the region.

Although the Windsor, Essex County and Pelee Island region is readily accessible through a variety of forms of transportation, those entering the region by automobile, either Americans entering the country via the Ambassador Bridge or Windsor-Detroit Tunnel, or Canadian travelers using Highway 401, may find their experience frustrating. As a result of the terrorist attacks on September 11, heightened security measures have been implemented that frequently cause longer line-ups and, in turn, increased waiting time at the international points of entry. These security precautions are felt most significantly when crossing into Windsor from Detroit, yet they also occasionally affect the flow of traffic from Highway 401 and Highway 3.

There are also limitations to the ease of traveling within the destination. It is not possible to travel from Windsor to Essex County or Pelee Island on public transportation. Access to Pelee Island is also somewhat limited. Both the ferry and air service are only available on a seasonal basis.⁷ Moreover, during the 2002 season, major disruptions in ferry service also significantly hampered Pelee Island's accessibility to potential visitors. Many of the Island's tourist facilities saw a substantial decrease in business as a result of the ferry service interruptions. It is possible, but not always easy, to travel to attractions in Essex County by car because signs are not always clearly visible and some attractions are located far from major thoroughfares. Travel to Pelee Island depends on ferry schedules and the weather.

⁷ Traditionally, the Island is open for tourism from April to early November.

Availability

The Windsor, Essex County and Pelee Island region generally offers a variety of accommodation options at a wide range of quality levels and price points, allowing each traveler to find his or her ideal accommodation facility. The only exception may be the accommodation base in the county, which, to a minor degree, lacks the variety found in the city. There are 64 Bed and Breakfasts (286 total rooms) in the region with prices ranging from \$49.00 to \$165.00 per night (all prices are based on double occupancy).⁸ Visitors can also choose from the region's 20 motels (19 independent and one chain with 526 total rooms), which have prices that range from \$35.00 to \$199.00. There are 16 Inns (eight independent, eight **branded**) with a total of 1 047 rooms ranging from \$58.00 to \$290.00 per night. The region also offers a choice of 10 hotels (1 570 total rooms) with prices ranging from \$80.00 to \$300.00 per night. Included in the hotel figures are the region's more elegant and higher-end operators such as Hilton Windsor, Radisson Riverfront Hotel Windsor, Quality Suites, and Holiday Inn Select. Most of the region's hotels, motels, and inns are clustered in Windsor's City Centre, Howard/Dougall Avenue and Huron Line areas.

For those visitors seeking a more rural experience, the Windsor, Essex County and Pelee Island region offers 12 campgrounds (2 319 total campsites), 11 of which accommodate recreational vehicles (RVs). The type of campsite varies drastically from basic tent sites to more "domestic" ones that offer water, electricity, or cabins. Most of the campgrounds cater to the vacation experience by offering a plethora of on-site activities including tennis, swimming and other water-based activities, basketball, baseball, and children's programs. Prices at these facilities range from \$25.00 to \$35.00 per night. The average weekly rate for campsites is \$136.17; the monthly rate averages at \$432.80.

In addition to the traditional accommodation facilities, the region has apartment-style accommodation offered by St. Clair College of Applied Arts and Technology and the University of Windsor. Each facility can house large numbers of people, though most are only seasonal vacancies. The region also offers a third apartment-style accommodation facility: one condo in Windsor for short or long-term rental. Spa offerings are limited to three choices. One is strictly spa only with accommodation for overnights, while two spas offer the option of accommodation with spa facilities or accommodation only. There are also some cottages to rent in the county and on Pelee Island, but they tend to be weekly or monthly rentals. If there is one aspect of the region's accommodations base that is virtually non-existent, then it is resort accommodations.⁹ Given that the region is

virtually surrounded by water, a resort-type accommodation could be a welcome edition to the region's accommodations base and be an enticing draw for potential tourists. Considering the extent to which travel destinations comparable to Windsor, Essex County and Pelee Island benefit from such resort accommodations facilities, such an endeavor would certainly be feasible for the region.¹⁰

In addition to providing travelers with an impressive range of quality levels and price points, the region's accommodation facilities also offer extreme proximity to all of the **core and supporting attractions**. Regardless of which accommodation facility the visitor chooses, many **core and supporting attractions** are within walking distance. All downtown hotels and motels, for instance, are within walking distance to such **core attractions** as gaming facilities (Casino Windsor and bingo halls), various **festivals**, and food and beverage establishments. For those choosing to stay in the county, Point Pelee National Park, winery tours, and Fort Malden National Historic Site, among others, are all readily accessible. Offering such proximity to the **core and supporting attractions** makes the Windsor, Essex County and Pelee Island experience that much more enjoyable and memorable for the visitor.

Product Review

Based on the Premier-ranked Tourist Destinations Workbook's criteria, Windsor, Essex County and Pelee Island's Product base is Premier-ranked. Distinctive **core attractions** are the region's strongest area, receiving affirmative results for all but one question. The region has numerous **core and supporting attractions** that are advertised by a variety of regional agencies. Cooperative marketing strategies are also in place to promote the region outside of the local area. The region's quality and critical mass was also strong, but did not fare as well as **core attractions**. It must be noted, however, that the quality and critical mass section does not allow for discussion of the fact that Windsor, Essex County and Pelee Island's visitors are largely same-day American tourists. With more effective marketing strategies through various organizations and significant product development, the overnight tourist base could certainly be increased, as there are **supporting attractions** that could entice visitors to stay more than just one day. This potential lasts throughout the year, as **core and supporting attractions** are available throughout the four seasons. The region was also awarded overwhelmingly positive ratings in terms of Satisfaction and Value, Accessibility, and Availability. Overall, Product is Windsor, Essex County and Pelee Island's strongest area in relation to the Workbook's criteria.

⁸ Pelee Island arguably has more Bed and Breakfasts per capita than anywhere else in the region. It offers 12 Bed and Breakfast or Inn-styled accommodations with a total of 77 rooms to hold approximately 154 people (assuming double occupancy).

⁹ See, for instance, www.resorts-ontario.com, which shows that Windsor, Essex County & Pelee Island does not have one.

¹⁰ See *Great Escapes: 2002*, Resorts Ontario's annual publication, for a recent listing of the province's resort accommodations.

PERFORMANCE

Windsor, Essex County and Pelee Island's Performance rating in the Premier-ranked Tourist Destinations Workbook is intended to identify the extent to which the destination is successful and recognized in the marketplace. To this end, the region was assessed on the following criteria: Visitation, Occupancy and Yield, and Critical Acclaim. The region's



overall Performance rating was derived by amalgamating these three individual criteria. As the findings indicate, Windsor, Essex County and Pelee Island's Performance received exceptionally strong ratings.

From a tourism perspective, an examination of Windsor, Essex County and Pelee Island's position as a Premier-ranked tourist destination could not have come at a more inopportune time. The September 11 terrorist attacks and the subsequent fallout associated with them has negatively affected the region's tourism sector arguably more than any other Canadian region. Following the attacks, increased security measures were implemented at Canada/U.S. border crossings, causing frequent traffic congestion and lengthy delays at the Ambassador Bridge and Windsor-Detroit Tunnel.

Another consequence of the increased border security is the requirement that Michigan boaters provide a thumbprint as part of the I-68 Canadian Border Boat Landing Program. An I-68 visa was required from each passenger on a boat making a border crossing. The failure to produce the visa could result in the confiscation of the boat. Many Michigan boaters felt that this was an arduous burden and, as a result, limited their number of trips to Windsor, Essex County and Pelee Island. The I-68 visa requirements devastated marinas with transient slips in the region and the businesses that

depend on them. As a result of all of these measures, same-day U.S. visitation, the region's primary market, decreased substantially.

The current war with Iraq will undoubtedly make matters much worse. The war immediately caused high security alerts in the United States, which will undoubtedly remain for at least as long as the war's duration, and will cause further disruptions to the flow of visitors across the border, thereby weakening the economy. Due to its proximity to the United States, Canada will also likely experience heightened security requirements and will have economic uncertainty weighing down its tourism sector. Another outcome of the war is the possible effect that inevitably higher fuel prices may have on travelers. American visitors to Windsor may decrease the frequency with which they visit the region as a result of these soaring fuel prices. The findings that follow should be considered with this knowledge in mind.

Visitation

The Visitation criteria and measures for the Premier-ranked Tourist Destinations Project assess Windsor, Essex County and Pelee Island's market performance in terms of the following attributes: its visitation numbers and market shares, its attractiveness to different market segments, and its appeal over the year's four seasons. As the findings indicate, the region's absolute and relative visitation performance is effective, or Premier-ranked.

Based on the Windsor, Essex County and Pelee Island Convention and Visitors Bureau's *2002 Marketing Plan*, the region attracts a significant number of visitors. In 2001, it attracted 7.2 million visitors, 6.2 million of whom returned home the same day, leaving only one million visitors who spent at least one night in the region. This is a weakness in the region, but not one that prevents it from being Premier-ranked. Windsor, Essex County and Pelee Island also attracts a significant share of the total VFR or pleasure-motivated travel to Ontario. In 2001, the region captured 14.9 percent of the 29.6 million VFR/pleasure motivated trips to Ontario. Its share of such overnight visits was less substantial at 6.9 percent.

One of the region's visitation strengths is that it attracts a significant portion of both its overnight and same-day visitors from beyond Ontario's borders. Although 554 000 or 54.9 percent of overnight guests in 2001 were from Ontario, a substantial 428 000 or 42.2 percent of visitors were from the United States. There were 15 000 (1.5 percent) visitors from other Canadian provinces, and 12 000, or 1.2 percent,

from other international markets. The more telling statistic concerns the percentage of same-day visitors to the region from beyond Ontario's borders. In 2001, an overwhelming 93 percent of the region's same-day visitors were from the United States. Ontarians accounted for only 6.9 percent. U.S. visitors are indisputably the region's strongest tourist base.

The region's share of total visits to the province from markets beyond Ontario's borders is also significant. Windsor, Essex County and Pelee Island was the destination for 34.13 percent of the 18.1 million visitors to Ontario from the United States in 2001. This number significantly decreased, however, for guests from Canadian provinces other than Ontario, where visitors to this region accounted for only one percent of the 91.2 million visitors to the province. The region also attracted a marginal 0.7 percent of the 2.7 million international visitors to Ontario. One of the



region's weakest areas in terms of visitation is its share of meeting and convention-motivated travel in relation to the province's total number. In 2001, only 5 percent (36 000 delegates) of the total meeting and convention-motivated visitors to Ontario chose this region as their destination. Unlike the region's overall visitation, however, the point of origin of the business and conventions-motivated traveler is almost entirely domestic. Ninety-five percent of the conventions-motivated travel emanates from the provincial or national area. Considering that the total economic benefit of

these conventions was \$ 62.5 million, the region would benefit greatly from further convention-motivated travel.

This region's share of visits to Ontario that included activities relying on its core attractions is significant. In 2001, the region accounted for 296 000, or 10.17 percent, of the 2.91 million trips to Ontario for the purpose of attending a bar or nightclub. The percentage is slightly higher for those whose destination was a casino. The region attracted

16.42 percent, or 221 000 people, of the 1.35 million visitors who visited Ontario for the purpose of attending a casino. 283 000, or 7.11 percent, of the 3.98 million participants in outdoor activities chose Windsor, Essex County and Pelee Island as their destination. It must be noted, however, that these figures do not take same-day American visitors into account, a segment where this region has strong visitation.

Compared to the Niagara region, Windsor, Essex County and Pelee Island attracts fewer visitors for most of the aforementioned core attractions. Niagara attracted 14.64 percent of the travelers attending bars or nightclubs, as opposed to Windsor, Essex County and Pelee Island's 10.17 percent. Forty-seven percent of casino patrons used the Niagara region's casino facilities, in relation to the 16.42 percent who visited this region. Niagara was the outdoor activity destination of choice for 16.12 percent of travelers, whereas Windsor, Essex County and Pelee Island drew only 7.11 percent. There is still work to do in terms of building the relative shares of visitation in these areas, but the comparison is generally positive or neutral for this region.

Windsor, Essex County and Pelee Island's visitation is equally distributed among multiple market segments and over more than one season. The quarterly distribution of total visitation is as follows: 20 percent in the first quarter (Q1), 25 percent in the second quarter (Q2), 32 percent in the third quarter (Q3), and 23 percent in the fourth quarter (Q4). With the possible exception of families with young children, the region is successful in attracting visitors with differing profiles. Two of the region's more common visitor groups are young American adults (20 to 24 years old),¹ and casino patrons (both Canadian and American). Visitation of young American adults is in accordance with the general quarterly visitation trends. The quarterly distribution of visitation of young American adults is as follows: 29 percent in Q1, 24 percent in Q2, 29 percent in Q3, and 19 percent in Q4. Visitation for the casino visitors' segment also generally reflects the overall visitation distribution. For casino visitation, the quarterly distribution is as follows: 34 percent in Q1, 22 percent in Q2, 30 percent in Q3, and 14 percent in Q4.

Occupancy and Yield

The Occupancy and Yield criteria and measures for the Premier-ranked Tourist Destinations Project assess the region's market performance in terms of accommodations base occupancy and guest expenditure levels. As the figures demonstrate, the region's occupancy and expenditure performance compared to norms, provincial averages, and the destination's share of visitation is Premier-ranked.

¹ Based on the disparity in the legal drinking age between Michigan and Ontario, a more appropriate market segment would undoubtedly be 19-24 years of age. These statistics are unattainable, however, as the CITIES project groups the market segments by 15-19 and 20-24 year-olds.

Windsor, Essex County and Pelee Island's average accommodation occupancy is under 65 percent (62.7 percent). This is possibly due to the economic slowdown in the United States, the security issues surrounding September 11, and the long build-up to the war with Iraq. The occupancy rate is distributed throughout the year, but is slightly higher during the middle quarters. The quarterly occupancy rates are as follows: 59 percent in Q1, 67 percent in Q2, 66 percent in Q3, and 57 percent in Q4. This unusually strong first quarter occupancy rate is due to the CVB's success in tapping into the accommodation needs of the Metro Detroit conventions traveller.



While occupancy rates could certainly be increased, the region attracts a higher than average amount of tourist spending. In 2001, the average expenditure per capita for guests on day trips to Windsor, Essex County and Pelee Island was \$92.61, or 127 percent of the \$72.20 provincial average. The average expenditure per capita for guests on overnight trips to the region was also greater than the provincial average. The average expenditure on overnight

trips to the region in 2001 was \$281.51, which is 102 percent of Ontario's \$276.00 average.

The region's share of expenditures by guests on day trips is greater than its share of day trips in Ontario. In 2001, the total spending by guests on day trips to the region was \$468.6 million. Total spending by all tourists on day trips in Ontario was \$1.6 billion, making the region's share of total spending by these tourists 29.9 percent. Windsor, Essex County and Pelee Island's share of expenditures by guests on overnight trips is also greater than its share of overnight trips in Ontario in 2001. Total spending by guests on overnight trips to the region was \$182.8 million, which amounts to four percent of the province's total expenditure income of \$2.6 billion. The region's share of total spending by these tourists was 6.9 percent.

Critical Acclaim

The Critical Acclaim criteria and measures for the Premier-ranked Tourist Destinations Project assess the extent to which the region is recognized as "must see/must do" destination. The destination must have a profile that contributes to the attractiveness of Ontario and Canada as a destination, and must be marketed as a top-ranked place to visit. Based on the requirements set forth in the Premier-ranked Tourist Destination's Workbook, Windsor, Essex County and Pelee Island's Critical Acclaim falls just short of being Premier-ranked.

The Windsor, Essex County and Pelee Island region is not at the top of the list of places out-of-town guests must be taken when visiting the *wider* travel region. This may be due in large part to the fact that the region is not advertised significantly in on-line or printed materials.² Many of the region's *core attractions*, however, are considered "must see/must do" when visiting the region itself as they have been classified as "top tier" destinations or have won awards of excellence. In terms of gaming, Casino Windsor was named the *Casino Player* Best of Gaming winner in 2002. With regard to festivals, Bluesfest International was voted the number one blues festival in Michigan in 2001; the program of festivals and events at Colasanti's Tropical Gardens has been recognized by the World Society for the Protection of Animals; Bright Nights won a 2002 FEO award for Best Print Advertisement. Moreover, the International Freedom Festival was recognized in 2002 as one of the top 50 festivals in Ontario. Food and beverage establishments have also garnered top billing. Most notably, the Alan Manor Restaurant was awarded the 2001 Wine Spectator Award of Excellence and was listed as one of the top 50 restaurants in North American by *GQ* magazine. Il Gabbiano Ristorante

² The Ontario Government's official visitors' information Web site (www.ontariotravel.net) does not advertise Windsor, Essex County and Pelee Island in any substantial way. This region is not promoted on www.canadatravel.ca either, whereas the region's most significant provincial competitors, Toronto and Niagara, are grouped as one large travel destination and are advertised significantly. The only Web site on which the region is advertised in any significant way is Southern Ontario Tourism's (www.soto.on.ca), which does not attract an equal number of visitors in relation to the aforementioned sites.

has been recognized with an Award of Excellence from *Wine Spectator* magazine, while Plunkett's Bistro was named the top restaurant in Windsor by *Visit Detroit* magazine. In terms of birding and natural attractions, Point Pelee National Park was declared a Wetland of International Importance by the Ramsar Convention in 1987 and designated an important birding area by the Canadian Nature Federation and Bird Studies of Canada in 1998. *Birders' World* magazine ranked it the seventh favorite place for birdwatching in North America.

To a certain extent, the birding experience in Point Pelee National Park and on Pelee Island, and Casino Windsor play a role in branding and marketing Ontario. Imagery and text used in some OTMP and CTC publications describe Ontario as a destination for birding and gaming activities. There is certainly much more that can be done to increase the role of Windsor, Essex County and Pelee Island in branding and marketing Ontario and Canada, including a more prominent role for this area on OTMP and CTC Web sites and lure brochures.

Performance Review

Overall, Windsor, Essex County and Pelee Island's Performance is Premier-ranked. Its total visitation is substantial and it attracts the majority of its visitors from outside of the immediate region, mostly from the United States. One area that could certainly be improved is the share of meetings and conventions-motivated travel that the region receives, which currently only constitutes 5 percent of the province's total. The region's Performance would also benefit from a desperately needed family-oriented core attraction. The destination's share of visits in Ontario that includes activities relying on the core attractions is also significant. The region is also somewhat competitive with region's offering similar attractions. Regions such as Niagara, however, surely benefit from the abundance of advertising that they receive from the OTMP and the CTC. Windsor, Essex County and Pelee Island also attracts visitors with differing profiles, and visitation is adequately distributed throughout the year.

The region also receives a high grade in terms of its Occupancy and Yield. Although the region's accommodation occupancy rate is less than 65 percent (62.7 percent), it would arguably be higher if the uncertainty surrounding terrorism, including the Iraqi war, were to recede. Visitation to this area is not equally distributed between same-day and overnight visitation, with the vast majority of the visits being same-day travelers from the United States. The

average expenditure for guests to Windsor, Essex County and Pelee Island exceeds the provincial average for both same-day and overnight visitation. Despite such successes, the region is only somewhat critically acclaimed. Perhaps owing largely to the fact that Windsor, Essex County and Pelee Island is not promoted or advertised substantially by provincial travel/tourism organizations, the region is not considered a "must see" to travelers visiting the wider travel region. Yet many of the region's core attractions such as gaming, festivals and food and beverage establishments have been critically acclaimed. More promotional and marketing activities by various organizations would undoubtedly increase the consumer's knowledge of such attractions and, in turn, could increase an already thriving overall visitation rate. Overall, Windsor, Essex County and Pelee Island's Performance, when judged in relation to the criteria presented in the Premier-ranked Tourist Destinations Workbook, is Premier-ranked.



FUTURITY

The Futurity component of the Premier-ranked Tourist Destinations Project is aimed at identifying the extent to which the destination invests in its future as a place with viable and continuing attractiveness to evolving markets. The overall Futurity rating was derived by amalgamating the findings for the more specific criteria of Destination Marketing, Product Renewal, and Managing with Carrying Capacities. As the findings indicate, Windsor, Essex County and Pelee Island received a high Futurity rating.



Destination Marketing

Windsor, Essex County and Pelee Island's Destination Marketing is Premier-ranked. The region is a viable and popular tourist destination with 7.2 million tourists having visited the region in 2001. This shows that there are some successful packaging and marketing initiatives taking place already. Having said this, the CVB has identified and is working to rectify limitations in packaging and marketing aimed at the FIT market. Of the visitors to the area in 2001, 6.2 million were from the United States, 1 024 000 were from Canada (mostly from Ontario) and 19 000 were from overseas. Tourism from the United States to Windsor, Essex County and Pelee Island has declined from the all-time high in 1999 of 9.1 million overall visitors and 7.9 million visitors from the United States. The war with Iraq and increased border security continue to depress U.S. visitation to this area.

The Windsor, Essex County and Pelee Island area has a Destination Marketing Organization (DMO) in the Windsor, Essex County and Pelee Island Convention and Visitors

Bureau (CVB). The CVB has an annual operating budget of 2 million dollars, 1 million or 50 percent of which is used for communications and marketing. The CVB is mostly funded by grants from the City of Windsor and the County of Essex, with some revenue from membership sales. The CVB would not be effective if it were forced to rely only on the funding of its members. The main activities of the CVB are to promote tourism, to facilitate convention bookings and to market the services of its members. The CVB promotes tourism in a number of ways. Under the leadership of Director of Tourism Sandra Bradt, the CVB works with its members to develop new tourism experiences and to package existing experiences to make them more accessible. The Tourism Division conducts familiarization tours and site inspections, direct sales calls and attends important conferences and meetings to increase awareness of the region's tourism products.

The Tourism Division also tracks and supports the growing motor coach tour sector in this region through Tourism Coordinator Francine Webb. The Tourism Division, through Tourism Assistant and Webmaster Patty Halls, is also responsible in part for answering the many phone calls and e-mails the CVB receives and for providing information to those who walk into the CVB office. The Tourism Division has a total proposed marketing budget of \$369 880 for 2003.

Despite the fact that motor coach tours were not identified in the Workbook, they are a significant part of the region's tourism sector. Although the most recent statistics demonstrate an overall drop in the number of coach visits from 2001 (7 181 compared to 7 258), it must be noted that the total number of individual visitors, 283 030, was the highest number on record. There were 6 868 day tours and 313 overnights to the region in 2002. All totaled, the expenditures exceeded \$28.5 million. The regional breakdown of motor coach tours in 2002 was 85 percent visitation to the city, and 15 percent to the county.

Although Casino Windsor generates most of the motor coach tours to the region, there are a small number of tours available for other attractions such as the African American Heritage Tour, Fort Malden National Historic Site of Canada, and Colasanti's Tropical Gardens. In addition, there are some very specific niche market tours that cater to the naturalist or birder. These tours visit Point Pelee National Park, and to a smaller extent, Holiday Beach, Hillman Marsh and Pelee Island. The birding tours cater to a smaller group package

and operate on pre-determined departure dates in the spring and fall. There are currently 14 birding tour operators that conduct birding tours at Point Pelee National Park. This includes operators from the U.S., Britain, and Canada.¹

One area of tour operators that is in need of improvement is their packaging. Although they offer suggested itineraries that FITs may want to assemble with their own CVB's Web site, pre-packaged tours (such as the Ale Wine and Spirits Tour, the Ghost Tour or other suggested routing), which may include accommodation, meals, and entrance fees to events, are not currently offered.

Under the leadership of Managing Director and Director of Convention Marketing Gordon Orr, the CVB aggressively seeks out its share of both the Ontario and Michigan convention markets. Convention Sales Managers Michael Chantler and Trese MacNeil attend trade shows, conventions and meetings to promote this region as a convention destination. Convention Services Coordinator Karen Kirby assists with bid preparation and Convention Assistant Jackie Korosec, who also assists with incoming phone calls, assists the entire department. The Convention Division has identified London and Hamilton as the region's primary competition and has prepared detailed analyses on the strengths and weaknesses of each. Ottawa and Toronto Convention Hotels are identified as the secondary competition and detailed analyses on the strengths and weaknesses have also been prepared. Competition in the Michigan market comes from Northern Michigan resorts and suburban Detroit hotel/conference centres. Like the Tourism Division, the Convention Division is working hard to overcome the lingering effects of the September 11 terrorist attacks. The Convention Division has a total marketing budget of \$246 920 for 2003.

The Membership Services and Communications Division provides services to the 550 members of the CVB as well as maintaining and growing the membership base. Director of Membership Services and Communications Mary Rodgers, who is aided by Membership Assistant Amanda Vignone, coordinates a variety of programs for the members, including the production of the CVB Visitor Guide and Map, the CVB Web site www.visitwindsor.com, the Hospitality Hero and Shirtsleeves campaigns, the quarterly Membership Matters newsletter and the information kiosk located at Casino Windsor. The Membership Services and Communications Division is also responsible for the Tourist Information Kiosk located in Casino Windsor. The Tourist Information Representatives provide information to visitors regarding member businesses.

They also conduct surveys of the tourists who use the kiosk, including asking why they have chosen to come to this area. Although only 3 percent of visitors reported having their choice of destination influenced by the CVB, it must be noted that this figure is derived from a mere 400 patrons. A plurality of respondents reported that they received their information from friends or relatives. The CVB also participates in the CITIES project in order to receive detailed statistical tables each year, as well as monitoring the origin of calls to its 1-800 lines and hits to the CVB Web site www.visitwindsor.com. The Membership Services and Communications Division has an overall budget of \$387 080 for 2003. It has revenue projections of \$275 000, mostly from membership sales.



The CVB issues an annual Marketing Plan that details the development and marketing strategies for each of the divisions within the Bureau. The strategies include **product positioning statements** and key objectives for each division.

Key objectives of the Tourism Division include:

- Regain and increase the number of overnight visits from all our markets.
- Continue quest for accurate tourism statistics by participating in the CITIES project.
- Expand awareness of the destination in our primary (Michigan, Ohio, Illinois, Indiana, Pennsylvania and upstate New York) and secondary (Wisconsin, rest of New York State) American markets.
- Expand destination awareness in the overseas market (United Kingdom, Germany and Japan). In particular, capitalize of the Japanese ESL programs through partnerships with Muskoka Language International.

¹ For a more comprehensive examination of motor coach tours in the Windsor, Essex County and Pelee Island region, see *Ontario Motorcoach Research Project: 2002 Windsor Report*, submitted by Paradigm Consulting Group in April, 2003.

- Continue to utilize the partner programs available through the Canadian Tourism Commission, Ontario Tourism Marketing Partnership, Great Lakes of North America, and Detroit Metro Convention and Visitors Bureau.



- Utilize the Visitor Guide and Lure Brochure as sales tools.
- Continue to facilitate the creation of market-ready packages for both the leisure and the group tour traveler.
- Endeavor to increase the amount of editorial coverage received and increase the value of the coverage by 5 percent.
- Endeavor to solicit business from three new tour companies.

Key objectives of the Convention Division include:

- Attain convention sales and servicing booking target of 104 188 delegate nights for future years.
- Maintain our positive presence in the national and provincial association markets.
- Ensure maximum usage of CVBreeze software program and maintain a current client database.
- Promote and encourage usage of our new on-line convention booking enquiry system.
- Direct sales will be at the forefront of our marketing activities:
 - Toronto sales trips – 11 sales missions will be coordinated with CSAE, MPI and PCMA events/conferences/trade shows to increase the awareness of Windsor by this important target audience.

- Ottawa sales trips – 5 sales missions will be coordinated with CSAE and MPI events/conferences/trade shows to increase the awareness of Windsor by this important target audience.

- Michigan sales trips – 7 sales missions will be coordinated with MSAE and MMPI events/conferences/trade shows to increase the awareness of Windsor by this important target audience.

- Recognize the importance of bringing decision makers/meeting planners to Windsor to allow them to experience our destination first-hand.

- Familiarization tours – up to two fam trips will be scheduled in the spring and fall. Invited guests will be from our target markets in Toronto, Ottawa and Michigan. Events will be coordinated with many of our convention-related partners to highlight this area as a viable convention destination.

- Site inspections – both sales managers will work towards bringing 15 qualified meeting planners from each of their prospective markets to Windsor during the course of the year.

- Identify and recognize the proliferation of e-mail requests and increased Internet usage as a trend for direct sales, research and promotional opportunities. Welcome the addition of our on-line convention inquiry booking system.
- Continue to service all groups by offering the complimentary services of bid presentations, facility arrangements, site inspections and venue reviews, information packages, Letter of Welcome, media releases, Ambassadors of Tourism, spousal/guest programs and tour itinerary planning.
- Join committees, boards and appropriate task forces to become further involved in member-based trade associations to become more active in their decision-making, and network with planners/suppliers.

Key objectives of the Membership Services and Communications Division include:

- Increase membership by 100 new members.
- Continue to increase the membership holding rate through the continuation of the Membership Retention Program.
- Increase member satisfaction through timely delivery of useful and relevant information.
- Increase member involvement in CVB initiatives. Enhance the profile of member business products and services in a cost-effective manner.
- Increase revenue through sponsorship opportunities and programs.
- Monitor visitor activity and measure visitation to our area.
- Provide cost-effective customer service training to the community on a contract basis.
- Increase awareness of the hospitality industry and the CVB.

The CVB monitors the progress made towards these objectives through monthly reports from CVB staff, which are, in turn, given to the CVB Advisory Board of Directors in quarterly reports. In addition to the monthly reports, these quarterly reports use statistics from the CITIES project, the Tourist Information Kiosk and the Ontario Ministry of Tourism and Recreation. The CVB also convenes with its stakeholders and members of the community at the Annual General Meeting, at which point the CVB is held accountable for the progress made on these objectives.

The Membership Services and Communications Division maintains the SuperHost Customer Service Program to train member businesses in the latest trends in customer service. This one day, seven hour training session focuses on employee skills and attitudes, internal communication and building pride and professionalism. In addition, the Hospitality Hero program recognizes member businesses that are nominated by guests for service above and beyond expectations. The monthly winner is presented with award certificates, a letter from the Mayor, a letter from the Warden of Essex County, a letter from the Mayor of Pelee Island, Hospitality Hero lapel pins and a prize package. This innovative program encourages member businesses to set new goals in customer service and provides examples of what their competitors are being recognized for.

In addition to the CVB, the town of Amherstburg has a Tourism Coordinator who attends trade shows and works to market Amherstburg as a tourist destination. She also administers the Amherstburg Visitors Centre that provides pamphlets and visitor information. The Leamington and District Chamber of Commerce also has a role in marketing the tourism product of the Leamington area, including administering the Tomato Information Booth and promoting the area at trade shows. The Town of Leamington grants \$20 000 a year to the Chamber, plus spends \$19 000 for advertising and promotions. Both of these organizations work co-operatively with the CVB in marketing and promotional efforts.



Product Renewal

Windsor, Essex County and Pelee Island's Product Renewal is Premier-ranked. It has seen a 184% rise in tourism in the last ten years,¹ which has both benefited from and fuelled an accompanying rise in capital renewal in facility renewal, expansion or development that would benefit the tourism industry.

Some of the higher-profile investments include:²

- \$2.26 million to expand Windsor Crossing Premium Outlets, plus \$2.361 million in renovations in 2000 and \$2.529 million in new construction in 1999.
- \$11.3 million to expand the slot machine lounge at Windsor Raceway in 2000.
- \$1.74 million in renovations to the Hilton Windsor in 1999.

¹ Casino Windsor, www.casinowindsor.com, November 1, 2002.

² Windsor-Essex County Development Commission, www.choosewindsor.com, January 15, 2003.

- \$5.7 million in renovations and additions to Devonshire Mall in 1999.
- \$7.0 million for interior renovations at Casino Windsor in 1999.
- \$1.4 million to build the Innkeeper Hotel in Windsor in 1999.
- \$790 000 to restore the Nazrey African Methodist Episcopal Church in 2000.



This does not include investment in hard infrastructure or investments before 1999, both of which are significant. Although the region has reinvested capital in its tourist destinations, it has only somewhat demonstrated an ongoing commitment to reinvesting in programming in order to enhance the core experience. While gaming facilities, festivals, and shopping venues do reinvest in such ways, others including the wineries and the Underground Railroad lag behind. Paying attention to improving the experience in addition to the facilities themselves can make a more lasting and memorable experience for the visitors.

Despite the overwhelming increase in tourist visitation in the past ten years, the retail sector in the City Centre has decreased substantially.³ In the past decade, for instance, Windsor's City Centre witnessed a loss of approximately 180 000 square feet of retail space. This includes the loss of five anchor stores during the 1990s. Given the decline in stores, it should not be surprising that total spending on retail declined 23 percent from 1990 to 2001. As research indicates, however, the re-introduction of retail in the downtown area is a frequent request. Three-quarters of those surveyed, in fact, believe that the City Centre is in

need of – and would benefit from – new retail opportunities. The most common requests were for more clothing and shoe stores. A gradual re-introduction of retail opportunities within the City Centre would arguably lure more people to the downtown area. In turn, this could lead to an increase in retail spending, and a further increase to the downtown core's overall revenue.

MANAGING WITHIN CARRYING CAPACITIES

Tourism in Windsor, Essex County and Pelee Island clearly generates economic benefits for the region, but the benefits are disproportionately concentrated in Windsor. On the whole, however, the region garners Premier-ranked status. Tourism has helped diversify the industrial base that has traditionally been dominated by the automotive sector. More than 5 000 jobs have been created by the opening of Casino Windsor and by the resulting increase in food and beverage traffic in Windsor's City Centre.⁴ This good news needs to be tempered with a consideration of the increased policing costs associated with having thousands of primarily young, intoxicated bar patrons in Windsor's City Centre as they leave the area's bars and nightclubs. Not surprisingly, intoxicated people engage in more assaults and public mischief than other visitors. Young people also engage in more assaults and public mischief than the average visitor, so the combination has caused a noticeable increase in the incidences of assault and public mischief in Windsor's City Centre. This requires a substantial police presence that necessarily takes away resources that could be used in other parts of the City. The bar and nightclub sector also causes increased litter with its flyers and coupons, and an increase in public urination as intoxicated bar patrons have no access to public or coin-operated washrooms.⁵ These factors cause a decrease in the quality of life for City Centre residents as well as for other visitors to the area.

The growing tourism sector has not bid up the cost of housing, labour or materials. In fact, housing sales in Windsor have grown 184 percent since 1993.⁶ This is due to the fact that tourism is far from being the largest sector of employment in the region. There are shortages reported in the trained labour market for food and beverage, which are being combated by training programs from Casino Windsor, HRDC, St. Clair College and OTEC.

Guests to Windsor, Essex County and Pelee Island generally report being satisfied with the hospitality and service they receive while visiting. The CVB's *2001 Visitor Information Survey* reported that the plurality of respondents rated their overall level of customer service as a 10 with less than

³ The Windsor City Centre Business Association commissioned John Winter Associates Ltd. to conduct research on the health and future of the downtown economy. They conducted surveys in 2001 and compared the findings to research from 1990. The statistics shown are taken from these findings.

⁴ op. cit.

⁵ John Winter Associates Ltd., "Windsor City Centre – Fine Example of a Main Street Programme," 2001.

⁶ Casino Windsor, www.casinowindsor.com, 2002.

10 percent of respondents indicating a five or less on a 10-point scale. Ninety-seven percent of respondents indicated that they intend to visit Windsor again. Accommodation surveys also support this finding. The CVB continues to push for more family-oriented attractions to be built and developed in the area in order to address that common complaint of visitors. When visitors have a specific complaint, the CVB addresses it personally. The Windsor Police Department has also committed to promptly replying to all complaints.

Visitation to Windsor, Essex County and Pelee Island has not overwhelmed the carrying capacities of the natural systems that sustain local ecosystems and quality of life. The increased vehicle traffic does contribute to air and noise pollution, while increased boat traffic contributes to water pollution. None of these new sources of pollution have a discernable impact on the quality of life or local ecosystems of the area, which face a greater danger from heavy industry and the thousands of trucks traveling through the area each day. Groups including ERCA and the Great Lakes Institute have studied the issue of quality of life impacts by pollution on an ad hoc basis, but there is no “wellness” monitoring program in place to provide early warning of whether quality of life impact thresholds are being approached.

Overcrowding and related declines in the quality of the visitor experience have been ongoing problems for the bars and nightclubs in Windsor’s City Centre. This is a problem on most Friday and Saturday nights, especially in the summer months.⁷ Traffic networks and points of entry are also overcrowded during the fireworks display at the International Freedom Festival, and occasional Friday or Saturday evenings during the summer.⁸ This limits access to Windsor-based core attractions, including festivals, bars, restaurants, shopping and sightseeing. Windsor’s City Council is aware of these problems, but has only taken limited actions to rectify them. These actions include capping the number of alcohol licenses in Windsor’s City Centre, participating in the Bi-National Partnership to find a long-term solution to overcrowding on the Ambassador Bridge and the Windsor-Detroit Tunnel, and investing in road maintenance and expansion. The City and County are jointly funding a consultant’s study of Windsor, Essex County and Pelee Island’s transportation needs.⁹

Growth in the region’s tourism sector is not being hampered by infrastructure issues, other than overcrowding at points of entry as detailed above. Specifically, Windsor, Essex County and Pelee Island have planned for enough growth in water

treatment and delivery, sewage treatment and trunk capacity. These plans are contained in the Official Plan or other planning document of each government, and have been subjected to the required environmental assessments. Carrying capacity in road, transit, parking and trails is negatively affected by uncertainty over line-ups and delays at the bridge and the tunnel. There is also an important environmental dimension to this issue that needs to be addressed before it can be declared resolved.

There are three staff members in the City of Windsor’s planning department and two full-time equivalents in the County of Essex who are responsible for managing review, approvals and permit processes with an abundant number of consulting firms available to provide assistance as required. Each town in the county also has the capacity to issue permits for smaller-scale developments. The City of Windsor and the County of Essex both recognize tourism as an important part of the regional economy. The Official Plans of Amherstburg and Leamington also recognize tourism as an objective, as will the first post-amalgamation plans of the towns of Essex, Kingsville, and Lakeshore.

The City of Windsor should be lauded for the completion of Casino Windsor, the riverfront park system, the Art Gallery of Windsor, the Capitol Theatre, and City Hall Plaza. On the whole, however, there have been instances of extreme frustration when being able to move forward with both private and public ventures as they relate to making tourism a top priority in Windsor, Essex County and Pelee Island. In Windsor, for instance, there have been long and continued delays in implementing and approving a proposal for the Western Super Anchor/City Centre West Community Improvement Plan. In addition, Lakeshore Town Council has undermined potential tourist opportunities when it ceased covering 50 percent of the cost of the Belle River Business Directory. Given that Belle River or Lakeshore does not produce tourist brochures or have a visitors’ kiosk, the Business Directory is the only thing that would encourage visitors to stay in – and return to – the area.

Futurity Review

Although Windsor, Essex County and Pelee Island has some problems with carrying capacity that need to be worked out, the region nevertheless garners a Premier-ranked rating for the Futurity dimension. Specifically, overcrowding in Windsor’s City Centre and at various points of entry dissuade visitors from returning and potential visitors from making the trip. With enough political will and the appropriate funding, these problems can be rectified and a burst of growth in visitation to the region can be expected.

⁷ John Winter Associates Limited, “Windsor City Centre: Fine Example of a Main Street Programme,” 2001.

⁸ Several respondents mentioned this during the survey phase of the Premier-ranked Tourist Destinations Project.

⁹ Chris Thompson, “Road study seeks input,” *Windsor Star* August 13, 2002, A5.

METRO DETROIT – OUR BEST ASSET AND OUR TOUGHEST COMPETITOR

What Does Metro Detroit Offer the Tourist Coming to Windsor, Essex County and Pelee Island?

The Metro Detroit area, composed of Oakland, Macomb and Wayne Counties, is home to some 4.6 million people. This is slightly more people than in the Greater Toronto area, which is Canada's largest tourist market. Visitors coming to Windsor, Essex County and Pelee Island can access Metro Detroit through the Ambassador Bridge or the Windsor-Detroit Tunnel in order to partake in the wide range of tourism experiences offered in the Metro Detroit area.



The opportunity to visit a major American metropolis is a unique element of the Windsor, Essex County and Pelee Island tourism experience. Detroit is the fourth largest metropolitan area in the United States, and is a legendary hub of African-American culture and history. Metro Detroit offers visitors the United States' largest island park, the unique Belle Isle. This 1 000 acre island park, located on the Detroit river, features the nation's oldest fresh-water aquarium, a venerable zoo and a breathtaking conservatory. It is also an important gathering place for the region's African-American community. The Henry Ford Museum and Greenfield Village, which celebrate nineteenth-century life and the history of the automobile, is one of the top ten tourist attractions in the United States. The Detroit Zoo's Arctic Ring of Life is the world's largest polar bear exhibit. The Charles H. Wright Museum of African-American Heritage is North America's largest African-American museum. Cranbrook is an internationally renowned art, education and science centre. The Detroit Institute of the Arts attracts

more than half a million visitors a year with its 100 galleries and special exhibits.

Metro Detroit has long been connected to music and entertainment. Boasting one of North America's best theatre districts and several signature venues, the area attracts the full range of performers and musicians. The Detroit Symphony Orchestra, North America's most heard orchestra, performs in historic Orchestra Hall. Metro Detroit is home to a range of top-notch live music venues, from the 15 000 seat outdoor DTE Energy Music Theatre and the modern 20 000 seat Palace of Auburn Hills to the more intimate surrounding of St. Andrew's Hall and the beautifully restored Fox Theatre. Detroit has teams in all four main professional sports leagues (baseball, hockey, basketball, and football), and has recently built new stadiums for the Detroit Tigers and Detroit Lions. In the coming years, Detroit will also be the site of major sporting events. For example, it will host the National Football League's championship game, the Super Bowl, which is the largest one-day sporting event in the world, in 2006. Oakland Hills Country Club in Bloomfield Hills will host the 2004 Ryder Cup, golf's premier team competition.

No consideration of entertainment would be complete without looking at the growing gaming sector in Metro Detroit. Three casinos have recently opened in Detroit: the MGM Grand, Greektown and Motor City. Each casino is at a temporary location until plans are finalized and government approval is secured to construct the permanent casino facilities.

Metro Detroit also has dozens of large and dynamic festivals, including the 154-year-old Michigan State Fair; the Woodward Dream Cruise attended by over 1 million people per year; North America's largest free jazz festival, the Ford Detroit International Jazz Festival; and several of the United States' largest African heritage celebrations. There is a full range of dining options available in Metro Detroit, including the popular Mexicantown and Greektown communities, trendy Harmonie Park and exciting Royal Oak, all with well-established tourism elements. There are a wide variety of shopping options for visitors to Metro Detroit as well, including the high-end Somerset Collection, the 2 million square foot Northland Centre and the outlet mall savings of Great Lakes Crossing.

Visitors to Windsor, Essex County and Pelee Island can access Metro Detroit in 10 to 15 minutes from the bridge or tunnel provided there are no traffic back-ups or security alerts. Currency exchange is offered at each border crossing at a fair rate. Information about key Metro Detroit

attractions is available from the CVB. No other Canadian city of a remotely comparable size can offer the breadth of tourist experiences that the combined Windsor, Essex County, Pelee Island and Metro Detroit area boasts.

How Does Metro Detroit Compete with Windsor, Essex County and Pelee Island?

Metro Detroit competes with the Windsor, Essex County and Pelee Island area first and foremost by being much larger, both in terms of population (4.5 million versus 300 000) and number of visitors (17.6 million versus 7.2 million). The **breadth of attractions** and comparable tourist experiences in Metro Detroit is in a different league than that of Windsor, Essex County and Pelee Island. For tourists who are willing to cross the border despite the occasional line-ups and sometimes intense security, comparable tourist experiences in Metro Detroit are generally better than those in Windsor, Essex County and Pelee Island. Detroit Metropolitan Airport is the world's sixteenth busiest airport, offering connections to hundreds of cities around the world. Quite simply, Metro Detroit offers a strong product, conveniently located and well established. There were 11 **attractions** and 10 **festivals/events** in Metro Detroit that were surveyed as part of the Premier-ranked Tourist Destinations Survey phase. The **attractions** averaged 12.44 percent Canadian visitation and the **festivals/events** averaged 15.00 percent Canadian visitation. This shows that **festivals/events** and **attractions** in Metro Detroit are nowhere near as dependent on cross-border tourism as their Windsor, Essex County and Pelee Island counterparts. **Attractions** in Windsor, Essex County and Pelee Island have been in operation an average of 26.79 years, with an average of 34.6 years for Windsor **attractions** and 24 years for **attractions** in Essex County and Pelee Island. By comparison, **attractions** in Metro Detroit have been in operation an average of 101.09 years. This shows how the **core attractions** in Detroit are more solidly linked to the history of the area, as well as establishing viability and name-recognition.

The news is not all bad for Windsor, Essex County and Pelee Island. The low value of the Canadian dollar relative to the American dollar gives this area a competitive advantage that, in part, counteracts the size and quality disparities. This area also benefits from having less crime and more modern and better-maintained infrastructure like roads and streetlights. The relatively small geographic area covered by Windsor, Essex County and Pelee Island makes it much easier to get from one **attraction** to the next, unlike Metro Detroit, which can take several hours to cross. The main barrier to maintaining and building this synergy are the

intermittent delays crossing the border. These delays will increase or decrease depending on the overall level of security in Canada and the United States.

The CVB has quite properly invested a great deal of effort into building a strong relationship with the Detroit Metro Convention and Visitors Bureau (DMCVB). The two groups share information and insights, and work to promote the area as a single destination with something for each visitor to experience. There will always be an element of competition between Metro Detroit and Windsor, Essex County and Pelee Island, but both regions have and will continue to benefit from a co-operative approach to marketing and packaging their tourism products.



CONCLUSIONS AND RECOMMENDATIONS

What Does the Workbook Conclude?

Windsor, Essex County and Pelee Island was measured against the Premier-ranked Tourist Destinations Requisite Elements Framework and received exceptionally strong ratings for Product, Performance, and Futurity. The Workbook and the preceding report show the following performance highlights:

- A region with a diverse range of **core** and **supporting attractions**, most of which are linked to the history or geography of the area. The only major gap in the **core attractions** base is the lack of a distinctive year-round, all-weather, multi-market attraction in Windsor.
- An accommodations base rich in **branded** operators and bed and breakfast properties but with few of the former in Essex County and Pelee Island and few of the latter in Windsor.
- A network of parks along the Detroit River that is popular with tourists but is lacking in animation and interpretation.
- The area enjoys strong visitation from the United States, although the effects of the American recession, the September 11 terrorist attacks, and the war with Iraq have caused a decline in tourism compared to 2000. The destination is primarily a day-trip market, due to the short duration of most of the **core activities**.
- A successful **DMO** that markets the region to tourism and convention travelers and is well funded in comparison to other similar jurisdictions.
- High levels of investment in tourism-related infrastructure and attractions (Windsor Raceway and Slots, Casino Windsor, Colasanti's Tropical Gardens, for example) occurring in the last five years that have dramatically improved the range and quality of the product available.
- Only one significant problem with carrying capacity, namely real and perceived delays at points of entry into the area.
- Windsor, Essex County and Pelee Island's proximity to the United States greatly improves the tourism potential of some of the area's **core attractions**.

What Should be Done?

The Premier-ranked Tourist Destinations Project's staff, in conjunction with the Project's various committee members, have considered potential improvements that could be implemented in the Windsor, Essex County and Pelee Island region in order to further solidify its position as a Premier-ranked Tourist Destination. These recommendations are outlined below according to their applicability to Product, Performance, or Futurity. Although each recommendation appears only once, some of them could easily be applied to more than one criterion.

PRODUCT

The Product element of the Premier-ranked Tourist Destinations Framework focuses on the existing tourism product offered by the destination. In the process of completing the Workbook and consulting with the various project committees, several recommendations emerged dealing with the need for new tourism products in Windsor, Essex County and Pelee Island. The most frequently heard of these is the proposal for a new, distinctive, year-round, all-weather, multi-market attraction.

A Distinctive, Year-Round, All-Weather, Multi-Market Attraction

There is not a distinctive, year-round, all-weather, multi-market attraction in Windsor, which is arguably the region's largest gap in terms of its position as a tourist destination. There have been many proposals for new developments, some of which are briefly summarized below. It is important to note that none of these particular proposals are being presented as recommendations:

1) *The Western Super Anchor*

As part of the Windsor City Centre Revitalization & Design process, Windsor City Council designated a parcel of land bounded by Riverside Drive, Bruce, Church and Chatham streets as the Western Super Anchor site for the purpose of constructing a multi-market **core attraction** that would balance the high traffic adult destination of Casino Windsor. Several proposals were considered and rejected, including a new arena for the Windsor Spitfires and a themed restaurant/entertainment centre. Ultimately, Windsor City Council rejected the latest of these proposals and launched the City Centre West Community Improvement Plan in late 2002 as a process to plan the future of this area in more detail. This process will last until mid-May of 2003, at which time Windsor City Council will review the results of the consultations and the deliberations of the steering committee and make its decisions. It may be that the process leads to a use for this area other than constructing

a tourist attraction, but this area has been the subject of a great deal of speculation and proposals for new tourist-related development over the last decade.

2) *Dave and Busters*

Dave and Busters is an American-owned chain of 32 family entertainment complexes that submitted a letter of interest to Windsor City Council to be considered for the then-titled Western Super Anchor site.¹ The status of their application is unknown at this time due to the launch of the City Centre West Community Improvement Plan process.

3) *The Windsor Aquarium Project*

In 1999, the City of Windsor's Chief Administrative Officer appointed an administrative committee to review potential attractions that might fulfill the City's tourism objectives. This committee concluded that the City's highest priority should be to develop a downtown, year-round, major family destination attraction to be built at the Western Super Anchor site. Further to this, they concluded that an aquarium would attract the highest visitation compared to eight other possible attraction types.² The federal, provincial and municipal governments could each provide some of the funding, in addition to a possible partnership with one or more private sector investors. This would be a regional destination that would serve as a trip motivator for families and schools, with the additional benefits of renewing the food and beverage sector in the western part of Windsor's City Centre. It may also draw visitors into the nearby Art Gallery of Windsor and generally into the western part of Windsor's City Centre. This proposal may be submitted to Windsor City Council pending the outcome of the City Centre West Community Improvement Plan process.

4) *The Junction*

The owners of The Junction, a family fun centre on University Avenue West in Windsor, have proposed to create a multi-faceted family destination that would expand on the Junction concept. They propose to use the \$2.3 million left to the City by Joseph Chimczuk for the purpose of creating a museum, archives, and library, to be named the Chimczuk Historic and Cultural Museum, Windsor Archives and Historical Records. The total cost of the project is estimated at \$7.8 million. The project would also incorporate the Sci-Tech Centre that is looking to relocate from Market Square on Ottawa Street and the Fujisawa Windsor Gardens being built in the former railway track path running parallel to the property. The site would include the existing Junction facility, plus an added restaurant, convention and meeting space and potentially a cultural exhibition in cooperation with the Can-Am Indian Friendship Centre located next door. This proposal is still being reviewed by various civic leaders and has not yet been formally presented to Windsor's City Council.

Downtown Bar and Nightclub Scene

Another issue facing Windsor's City Centre is the influence of the burgeoning bar and nightclub sector. Visitors coming to the area's bars and nightclubs are sometimes involved in disturbances and altercations with police or other patrons. Another problem that occurs is public urination by people



leaving the area's bars and nightclubs. Creating public washrooms and/or coin-operated toilets would help solve this problem, while additional resources for the Windsor Police would improve the safety and enjoyment of Windsor's City Centre for both visitors and residents. Consideration should be given to modest safety and infrastructure improvements in the area, including the removal of some or all of the benches on Ouellette Avenue. This would increase the amount of personal space available to pedestrians, which would in turn prevent some of the inadvertent physical contact that may lead to disturbances and altercations. Another potential solution is to add more street lights in the downtown core, thereby increasing the amount of light on the streets and sidewalks during those times when the sidewalks are most crowded. This, in turn, would decrease inadvertent physical contact and aid police responses. It is important to note that the bar and nightclub scene employs a great many people and has been a powerful engine of city centre revitalization. Any policy change must be carefully crafted as to not "kill the golden goose" by excessively increasing the costs of area businesses or decreasing the quality of the experience for visitors.

Via Italia

The Via Italia area of Windsor is a well-established day-trip market. It combines retail with food and beverage establishments to create a strong tourist draw. There is the potential for an overnight visitation market in the area if existing experiences are packaged in such a way to be easily accessible and geared to an overnight visitor. In fact, all

¹ Roseann Danese, "Dave & Busters woos city," *Windsor Star*, June 20, 2002, A3.

² The other eight attractions are amusement parks, water parks, go-kart tracks, miniature golf, historical attractions, natural attractions, vacation campgrounds, and family entertainment centres. See *The Windsor Aquarium Project, 2002*, for more specific information concerning the aquarium proposal.

tourist-oriented businesses in the Via Italia area should reach out to visitors by packaging their products to create a range of either pre-selected or self-guided experiences at a variety of price points. The area would need to add additional parking capacity if tourism were to increase as a result of these proposals. Stakeholders ought to plan for this possibility by identifying potential sites and allocating funding.

Resort Accommodations

As previously noted, there are some areas that would benefit from an increase in tourist accommodation. One facility that is currently lacking but would be a welcomed addition to the area is a resort accommodation. Likely to be located in the county, a resort would attract a market segment that is currently unacknowledged by the region's accommodations base. Packaging deals at a variety of price points between a resort and various attractions (e.g., golfing, birding, Point Pelee National Park of Canada) would make such a venture more effective. It would have the additional benefit of being geared primarily towards families who do not have the breadth of available attractions in the region that the adult traveler enjoys. The CVB and the Windsor-Essex County Development Commission should work cooperatively with the private sector to facilitate the construction of a resort accommodation by way of a feasibility study and a special marketing committee of stakeholders to market the proposal to private sector investors.

New Tourism Sectors

It is likely that, with this new data, activities that are not generally considered to be core trip motivators will come to light. Prescription drug sales to American visitors, for example, are not generally considered a tourist draw, although they already bring a substantial amount of money into the local economy. This is not a traditional tourist activity, but any commercial venture that encourages visitors to come to this



region and spend their money ought to be supported by local and provincial marketing campaigns. Therefore, the construction of a walk-in clinic and a cooperative pharmacy at a tourist oriented retail area in the City should be considered. Not only would this capitalize on the niche market of prescription drug visitors, but would further enhance the shopping experience in Windsor, Essex County and Pelee Island.

Packaged Group and FIT Tours

One area that is in desperate need of improvement is the availability of pre-packaged group and FIT tours. With relatively few exceptions, the region's tourism products are not easy to buy in advance, which may deter some guests from visiting the region. It is of the utmost importance that tourism-based establishments make pre-packaged tours available to the visitors, particularly in the fast-growing area of outdoor experiences. Whether it is accommodations partnering with golf courses or restaurants, or Windsor, Essex County and Pelee Island attractions partnering with Detroit attractions, pre-packaged tours at a variety of price points with a range of options are an integral component of the modern tourist's wish list. The area's Ale, Wine and Sprints tour, for instance, could be expanded to include accommodations, meals, and on-theme activities.

Some other suggestions that have been brought forth include tours highlighting the region's rich history and natural beauty. For example, a Rum Running Tour³ would give both the city and the county an opportunity to display some of the more infamous rum running areas, including tours of local homes that were integral parts of the smuggling route. Cooperative marketing could also be done with area bars and restaurants linked to that era. There may also be some opportunities to celebrate the heritage of the Detroit River, which has historical significance for both Detroit and Windsor. It is, in fact, the only Heritage River recognized by both Canada and the United States. Outdoor experiences can also function well in this area. With the abundance of natural attractions such as Point Pelee National Park of Canada, and ERCA sites including Holiday Beach and Hillman Marsh, there are opportunities to pre-package tour experiences. Although there are numerous bed and breakfasts in the county, there are, as noted, some limitations in terms of branded accommodations in the county that may initially deter visitors from partaking in such activities. If these limitations can be overcome, outdoor experiences can be a new engine of tourism for Essex County and Pelee Island.

At present, the CVB offers a range of familiarization tours to the area, which are primarily geared toward meeting planners, travel writers, travel agents and tour operators. For the most

³ Rum running was the smuggling of alcohol from Canada to the United States during the prohibition years of 1920-1933.

part, FAMs are offered on an *ad hoc* basis; that is, if someone wishes to come and view the area, then the CVB will set up and offer a program. However, there are few FAMs in place for spring 2003. In order to increase the potential of tours being offered in this area, it is recommended that a series of tour operator FAMs be organized. The focus should be on targeted niche market operators who offer birding or angling packages as part of their product offerings. These tour



operators could be from the U.S., U.K. or Canada. The time frame would be in the spring or fall, when birding and angling experiences are at their best. For North American tour operators, the FAM could be offered over a 2-3 day period. For international tour operators, it may be possible to offer a 2-3 day FAM as a stand-alone or an addition to other FAMs being offered by the Canadian government. The focus of the FAMs would be to target market our strongest product offerings to the key decision makers in this niche tourism market.

Improving the Park Experience

The riverfront park system, which consistently draws significant numbers of visitors, should be enhanced with new animation and interpretation. The parks offer a beautiful and peaceful relaxation area for visitors and residents alike, but an increased emphasis on interpretive programming and animation would broaden the appeal of the park system. Following such an endeavor, the parks would appeal to those who are looking for a more interactive experience that focuses on the history and significance of various parts of the Detroit River and the communities that depend on it.

PERFORMANCE

The Performance element of the Premier-ranked Tourist Destinations Framework focuses on the performance of the tourism product offered by the destination. In the process of completing the Workbook and consulting with the various project committees, several recommendations emerged dealing with the need for improvements in tourism

performance in Windsor, Essex County and Pelee Island. The most frequently heard of these was the need for a solution to real and perceived congestion at the points of entry into the area. This is a problem that needs to be dealt with as it may decrease the frequency with which Americans, the region's strongest market segment, visit. This, in turn, could have a devastating effect on some of the region's **core attractions** and primary trip motivators as they may not perform as well as they currently do if cross-border visitation was to disappear.

Points of Entry

Congestion at points of entry into Windsor, Essex County and Pelee Island creates a barrier to rebuilding the visitor market lost in the aftermath of September 11. The frequency of collisions on Highway 401 between Chatham and Windsor and the frequent perceived and real delays at the Ambassador Bridge and Windsor-Detroit Tunnel dissuade potential visitors from coming to the area. Moreover, the demands of Michigan's I-68 boater's landing visa, which also stems from the terrorist attacks, are a severe visitation deterrent that has dramatically reduced the prosperity of tourist-oriented marinas. Such problems cannot be solved at the local level, and require the persistent efforts of all levels of government on both sides of the border to develop long-term solutions. Some progress has already been made on developing proposals to minimize delays crossing the Canada-U.S. border, but more political will and cooperation is needed to accelerate the process.

Advertising and Marketing Essex County and Pelee Island

Essex County and Pelee Island have powerful trip motivators in their natural attractions. With additional product development and marketing, the birding, boating, angling, sailing and hunting experiences can be much more lucrative than they are currently, both to tourists and to the local community. The area also has the critical mass of estate wineries to create a top-level experience, provided that the wineries agree to work more closely together and package food and accommodation with their winery experience. A single Web site that allows visitors to choose from a variety of packages that involve one or more wineries with a combination of other businesses would be a valuable marketing tool for this industry and a catalyst for tourism in Essex County and Pelee Island.

Improved Signage

Although Windsor, Essex County and Pelee Island has a significant number of core and supporting attractions, they could be better advertised through more effective signage along the numerous points of entry and within the City and

County. Many visitors to the region may find it difficult to locate their desired destination because the existing signage does not provide adequate indication of the distance to various attractions. The Province's Tourism Oriented Destination Signing Program (TODS), which is responsible for signage on King's and Queen's Highways, and the Trailblazer signs on Essex County roads, ought to indicate the distance remaining to the attraction.



Improving the CVB

Tourism marketing is done best with reliable and statistically valid data that can be compared year over year. While the surveys that are currently conducted demonstrate that visitors are overwhelmingly pleased with the region, more readily accessible (perhaps via the Internet) surveys would provide a more conclusive indication of the extent to which guests enjoy their visit to Windsor, Essex County and Pelee Island. They could also provide a more accurate indication of the attractions that motivate visits to the area. The CVB should inaugurate an annual workshop, perhaps in conjunction with their AGM, to train interested parties in a standard survey methodology that would provide this more accurate data for various marketing campaigns. The data gathered from these new surveys could also be used to determine winners for a high-profile Tourism Awards Show to honour the most successful tourism stakeholders in the area. This event could boost both the prestige of the industry and the profile of the CVB, and could be implemented with the CVB's 2004 Annual General Meeting.

Another necessary move for the CVB is to use the findings of this report as a beginning for a strategic planning exercise, involving the CVB Board of Directors, stakeholders and city and county governments. Such an exercise would replace the strategic plan that expired in 1997 but has not been replaced due to the consideration of the Randolph Group report and the impact of City of Windsor restructuring. It should be

noted, however, that *Project Team*, a one-year project that will search for more effective and efficient ways for the City of Windsor to conduct business, may affect the applicability of these recommendations.

FUTURITY

Building on the Existing Product in Essex County

The town of Amherstburg has great potential as a tourist destination. It offers a National Historic Site in Fort Malden, a beautiful riverside park at the Navy Yard, the North American Black Historical Museum, the H.M.S. Detroit replica now under construction, and a diverse range of dining options. What Amherstburg lacks is a mid-range hotel for visitors looking for overnight accommodations.

It may be that the view of some Amherstburg residents that any new commercial building be matched to the historical motif of the town will preclude an agreement with a hotel operator. If not, then Amherstburg Town Council and the Windsor-Essex County Development Commission, with the support of the CVB, should work to lure a branded hotel operator into Amherstburg as soon as possible by completing a feasibility study that would assess the financial viability of this new accommodation property.

Amherstburg is not the only part of Essex County with untapped tourism potential. The Lakeshore area has abundant natural resources in angling, beaches, birding, and boating. There are marinas, beaches, bird sanctuaries and golf courses in the area that could be packaged together to create a more marketable experience. The town of Belle River offers home galleries, dining and a marina for tourists looking for layers of added value in their visit. The Belle River BIA reported that at least 10 percent of business in the area came from American visitors. Clearly there is a market that would support an increase in the stock of tourism product in the area. Moreover, considering that the area has no lure brochure, visitor information kiosk, or business directory, Lakeshore Town Council should work more effectively in attempting to take advantage of Lakeshore's tourism potential. Only with an increase in the breadth and depth of tourist experience available, along with the support of Lakeshore Town Council, will the tourism potential of Lakeshore be more fully realized.

Pelee Island is one of the area's most recognizable destinations. It offers some of Canada's best birding opportunities, as well as a mild, relaxing experience for visitors looking to "get away from it all." Pelee Island needs to have transportation links that are widely perceived to be reliable in order to lure visitors in great numbers. The CVB should ensure that potential visitors to Pelee Island who are accessing information from the Bureau are aware of the

various methods by which they can access Pelee Island. The tourism operators on Pelee Island, in turn, not only need to refresh their product and more closely cooperate with each other in order to improve the quality of the tourist experience, but should enhance the experiences they do offer and develop new experiences to maintain the flow of repeat visitors. Moreover, in this world of uncertainty over travel safety and security, Pelee Island needs to work harder to convince visitors to take the extra time to travel to the Island and enjoy the unique experiences it offers.



Continuing City Centre Revitalization

The City of Windsor has made important progress in revitalizing its once decaying downtown core. The Windsor City Centre Revitalization and Design Study was adopted by Windsor City Council in October 1994 and has guided tens of millions of dollars of new investment in Windsor's City Centre. New parks have been opened, an obsolete office tower has been turned into condominiums, and DaimlerChrysler Canada opened its ultra-modern Canadian headquarters in the City Centre area. Add to that the permanent site of Casino Windsor and the Art Gallery of Windsor, among other successes, and there is good reason to celebrate and support the revitalization process. Windsor would be well served to give this process increased resources, and more importantly, political support in order to maintain the momentum of City Centre revitalization. Creating a specific committee mandated to lure tourism investment into the area could potentially assist the revitalization process by proactively seeking out new investment and giving potential investors a clear idea of whom they should be dealing with. There are still unoccupied buildings and undeveloped lots at key intersections in Windsor's City Centre that could be used for more productive applications.

In particular, the proposals for a transient-use marina and the Secret Garden are worthy of further consideration. Marina availability in Essex County is more than adequate, especially with Amherstburg looking to add 32 more

transient slips as part of Phase II of the K. Walter Ranta Marina improvement project. In central and western Windsor, however, there is a significant geographical gap in terms of marina coverage. If this can be rectified, then transient boaters could dock at a conveniently located marina and access Windsor's City Centre. Over time, low-value residential or commercial properties located nearby could be replaced with new or modernized residential and commercial properties that will reflect higher property values. There are clearly engineering and traffic issues to overcome before this proposal could become a reality, but the economic value of bringing more visitors directly into Windsor's City Centre ought to motivate a reconsideration of this proposal.

The proposed Secret Garden would add an important family attraction to the western part of Windsor's City Centre. The Garden would be a natural gateway to the Fujisawa Windsor Gardens being built along the former railroad track path just west of Caron Avenue. It would be a low-cost and easily maintained attraction that would build on the value of the riverfront park system while maintaining the important trail network from the Ambassador Bridge to Hiram Walker.

Sports Tourism

Windsor, Essex County and Pelee Island should consider allocating more attention and funding toward the marketing of sports tourism. The region will gain national attention in the summer of 2003 when it hosts Baseball Canada's Single Site Baseball Championships. In addition to this event, the region has played host to several professional events including golf championships. Such events have and will bring unprecedented numbers of sports tourists to the region. Therefore, increased marketing and perhaps an investment in existing or new sporting facilities may prove beneficial to Windsor, Essex County and Pelee Island.

Including Tourism in Transportation Planning

The municipalities of Essex County are currently participating in a regional transportation study designed to ensure that sufficient infrastructure exists to meet the area's transportation needs for the foreseeable future. It would be advisable for tourism stakeholders to participate in this study in order to ensure that all tourist attractions are easily accessible.

Clearly International Centre

A by-product of making pre-packaged programs available is that it may also benefit the region's business and conventions-motivated travel by enticing convention travelers to bring their families and to make a full vacation out of the trip. This increase in conventions-motivated travel will further emphasize the need for a seamless expansion to the Clearly International Centre. Since the Clearly does not have the capacity to host the size of conventions that would

be attracted by the new growth of the attraction and accommodation base in Windsor, Essex County and Pelee Island, such an expansion should remain a priority for the City of Windsor. This expansion could be funded by a public-private partnership.

Product Development Support

Product development is an integral part of the success of any tourist destination. In order to ensure the continued success of the tourism sector in the area, additional steps are needed to strengthen Windsor, Essex County and Pelee Island's commitment to tourism product development. Small Business Enterprise Offices, operated by the Ontario Ministry of Enterprise, Opportunity and Innovation, offer information and advice to anyone starting or managing a small business. Each office is a one-stop source of information with access to Internet and resource materials, providing assistance and advice on preparing a business plan, financing, and managing the business. The Ministry of Tourism and Recreation should consider working with these offices to ensure that tourism-related businesses can benefit from an adequate supply of information and expertise. These offices would bring into one place all of the information a potential tourism operator could want, including the various funding options from the Business Development Bank of Canada and private sector lending institutions.

Once operators and their tourist facilities are established, product development must not cease. As noted earlier in the report, established tourism operators must ensure that their products are "fresh" by reinvesting in both their tangible products and in the experience itself. In doing so, operators will be essentially partaking in further, and arguably more significant, product development exercises. An apparent dilemma, however, becomes evident: if operators deem it necessary to reinvest in or reinvent their product, then perhaps their product is not performing as well as it could, hence the operators' decision to reinvest. In this situation, operators may not have access to the necessary funds to invest. One possible solution is a loan guarantee program for Ontario's tourism-oriented businesses. A provincial government fund could be created to guarantee loans taken out for the purpose of product redevelopment and/or reinvestment in each community. This would be a timely investment in an industry that has been battered by recent international events beyond its control. Having said that, the responsibility for choosing what the fresh new product would look like must always remain with the tourism operators themselves.

Marketing

The Ontario Ministry of Tourism and Recreation needs to increase their marketing of Windsor, Essex County and Pelee

Island to the Midwestern United States. The advantages Windsor, Essex County and Pelee Island have in terms of location and the favourable U.S. dollar exchange rate are already powerful advantages to this area's tourism sector, but the potential exists for much greater penetration into the market beyond Southeastern Michigan and Northwestern Ohio, especially once the war with Iraq has ended. In order to build on its previous successes in promoting the area to the American market, the CVB should be rewarded by an increase in funding from both the City of Windsor and the County of Essex in the near future.

What to Do Next

In cooperation with the Ontario Ministry of Tourism and Recreation and city and county stakeholders, the CVB ought to immediately strike a management committee to promote and work towards implementing the recommendations found in this report. Committee members should be drawn mainly from the various committees that advised the Premier-ranked Tourist Destinations Project staff. This body would encourage tourism operators and sectors to move forward on the Product, Performance and Futurity recommendations in the Premier-ranked Tourist Destinations Report, including prioritizing the recommendations and developing action plans to see them implemented.

This project has drawn together the knowledge and opinions of a wide range of tourism industry stakeholders from throughout Windsor, Essex County and Pelee Island, making this report a powerful statement of the strengths, weaknesses, opportunities and threats facing the tourism market in this area. Great care should be taken to ensure that this report, and the conclusions it draws, is consigned neither to the dusty shelves of history nor the lethal battlegrounds of political partisanship. This strong and growing industry deserves no less.

Summary of Recommendations

PRODUCT

- Make the creation of a distinctive, year-round, all-weather, multi-market attraction in Windsor's City Centre an immediate priority. In addition to an aquarium, another suggestion has been an interactive science centre.
- Create public or coin-operated washrooms in Windsor's City Centre.
- Remove some or all of the benches that impede pedestrian traffic on Ouellette Avenue.

- Create and market a range of package tours that focus on the Via Italia area.
- Stakeholders should prepare to create new parking capacity in the Via Italia area should it become necessary.
- Market to private sector investors the idea of building a resort accommodation in Windsor, Essex County and Pelee Island. A feasibility study and marketing committee funded by private and public stakeholders in association with the CVB and the Windsor-Essex County Development Commission could accomplish this.
- Identify and market new tourism sectors, including the sale of pharmaceutical drugs to American visitors.
- Construct a walk-in clinic and a cooperative pharmacy in a tourist oriented retail area in order to further capitalize on the niche market of American prescription drug shoppers.
- Create more pre-packaged FIT and group tours at a variety of price points.
- Have the CVB offer FAMs for angling and birding tour operators looking to include the area as part of their tour packages.
- Improve the quality and quantity of animation and interpretation offered at the riverfront parks.

PERFORMANCE

- Recognize that congestion at points of entry is a serious barrier to increased visitation that can only be solved by the persistent efforts and cooperation of all levels of government.
- Create a “one-stop” Web site to market pre-packaged programs pairing Essex County wineries and regional attractions, restaurants and accommodations.
- Ensure that both TODS and Trailblazer signs include a clear indication of how far away the destination is from the sign.
- Have the CVB launch an annual workshop, perhaps in conjunction with their AGM, to train interested parties in a standard survey methodology that would provide the most accurate data possible for various marketing campaigns.
- Begin an annual Tourism Awards Show to enhance the prestige of the industry and build the profile of the CVB.
- Use this report to begin a strategic planning exercise for the CVB.

FUTURITY

- Launch a feasibility study for a new mid-range branded accommodation property in Amherstburg.
- Restore the 50-50 cost-sharing agreement between the Lakeshore Town Council and the Belle River BIA for the production and distribution of the Belle River Business Directory.
- Ensure that potential visitors to Pelee Island are aware of the various methods by which they can access the Island.
- Refresh the tourism product and increase the amount of cooperation between tourism operators on Pelee Island.
- Increase financial and political support to Windsor City Centre revitalization efforts. In particular, reconsider a transient use marina and a Secret Garden north of Riverside Drive.
- Increase marketing of sports tourism as a new growth market in the area’s tourism sector.
- Ensure that tourism partners actively participate in the transportation study currently under way in Essex County in order to ensure that tourist destinations are easily accessible.
- Constructing a seamless addition to the Cleary International Centre in order to boost the region’s ability to host larger conventions should be a priority of the City of Windsor.
- Increase support of product development and reinvestment by the Ministry of Tourism and Recreation in cooperation with the Small Business Enterprise Offices of the Ministry of Enterprise, Opportunity and Innovation.
- Increase marketing of Windsor, Essex County and Pelee Island in the Midwestern United States by the Ontario Tourism Marketing Partnership and increase resources for the marketing efforts of the Convention and Visitors Bureau.

A SUMMARY OF PROPOSED RESOURCES AND OPPORTUNITIES

The redevelopment of Festival Plaza, which will include a new all-weather bandshell, improved seating areas for festivals, additional washrooms, and concession stands, is still dependent on a grant from Ontario's SuperBuild fund to cover the \$10 million cost. Other shoreline improvement projects that also depend on government support include the completion of the Bert Weeks Fountain at the foot of Parent Avenue, the Hatch Wildflower Garden, new concession and washroom facilities at Dieppe Gardens, and a marina (see Downtown Windsor Marina listed below).

The Comber Motor Speedway is a \$20 million, 16 000 seat motor speedway proposed for the Comber area in Lakeshore. The Ontario Ministry of Transportation has approved the proposal and has agreed to build a critical highway interchange to accommodate increased traffic. Construction is expected to begin in late 2004.

Destination Windsor is a joint marketing strategy between the Windsor, Essex County and Pelee Island CVB and the Windsor Airport. It hopes to increase visitation by offering new and affordable direct flights from major Canadian and American cities, by offering new incentives and reward packages, and by creating innovative marketing programs that will raise awareness of the region's vast range of tourism opportunities and values.

The Downtown Windsor Marina is a proposal contained in the Windsor City Centre Revitalization & Design Study to construct a major transient boater oriented marina in the eastern part of Windsor's City Centre. This marina would substantially increase the region's supply of transient slips.

The Great Lakes Clean-up is being coordinated by the International Joint Commission, an independent body formed to make policy recommendations to Ottawa and Washington regarding the Great Lakes. Eventually, these cleanup efforts should improve water quality enough to reduce the number of beach closures in the Windsor, Essex County and Pelee Island area.

The National Marine Conservation Area is proposed for the western basin of Lake Erie, which contains over 200 shipwrecks. The resolution was proposed by the Town of Leamington and was supported by Kingsville Council.

A new multiplex cinema with a potential 12 screens is planned for the town of Lakeshore. Although the land has yet to be purchased, there are at least three companies interested in developing the venue. The multiplex would be an individual facility that would be proximate to proposed Wendy's, KFC, and Tim Horton's restaurants.

STEP 2: PRODUCT

The PRODUCT elements and criteria address the features that enable a destination to offer a high quality tourist experience.

A DISTINCTIVE CORE ATTRACTIONS

The Distinctive Core Attractions criteria and measures assess:

- what it is about the destination that makes it stand out as distinct in the marketplace;
- how the destination's attractions are distinguished; and
- how the destination offering is relevant to market wants.

On completion of Section A, you will have identified the destination's core attractions, their distinctiveness, and the nature and size of the visitor markets to which they are considered to be attractive.

A1. The destination offers distinctive core attractions which are intrinsically linked to its physical setting and/or history.

i. A Resource Audit has been completed.
Yes A No

ii. The Audit distinguishes between core and supporting attractions.
Yes A No

The core attractions are:

Canada experience, Shopping, Parks, Culinary experience, Clubs, Gaming, Wineries, Festivals, boating/marinas/angling, Pelee Island, Fort Malden National Historic Site, Point Pelee National Park, Underground Railroad, Colasanti's Tropical Gardens, and birding.

The supporting attractions are:

Pride of Windsor Cruises, Art Gallery of Windsor, Hiram Walker, Windsor Community Museum, Walkers Fine Candies, Theatre/Performing Arts, Furniture Shopping, Detroit Experience, Golfing, Essex Railway Station, Southwestern Ontario Heritage Village and Transportation Museum, Amherstburg Gardens, Lighthouse Cove, Fujisawa Zen Garden, Gibsons Gallery and Jack Miner Bird Sanctuary.

iii. The core attractions motivate tourist travel to the destination.
Yes A No

- They do so on their own
and/or
 as part of a regional complex.

The regional complex includes the area known as _____

or bounded by _____

iv. Opportunities to build on complementary tourism attractions/activities with nearby destinations have been assessed.

Yes A No

These have been assessed through:

Meetings with Detroit Metro, Chatham-Kent and Peterborough CVBs.

which concluded that:

Co-operative marketing can occur with these areas with selected products. (ex. Two Nation Vacation, Underground Railroad, Carpfishing)

v. The core attractions are linked to the physical setting of the destination.

Yes A No

This physical linkage arises from:

Geography / Climate = Birding, Point Pelee National Park, Pelee Island, wineries, boating, marinas, and angling.

vi. The core attractions are linked to the history of the destination.

Yes A No

This historical linkage arises from:

Fort Malden National Historic Site, Point Pelee National Park, Underground Railroad.

vii. Other Ontario destinations with competitive or similar offerings have been identified.

Yes A No

The nearest such destination(s) and its (their) distance from the subject destination is (are):

<u>Competitive Destination</u>	<u>Distance</u>
Toronto	400 km
Niagara Falls	428 km
London	200 km
Detroit	10 km
Toledo	60 km
Sandusky	200 km

viii. The destination is considered to stand out as distinct from its competition (as identified above).

Yes A No

Because: Close proximity to U.S. (compared to other Canadian cities), better dollar value than American cities, cleaner and safer than most cities.

ix. The destination has a product positioning statement.

Yes A No

It is:

The Southern most point in Canada
Canada's southern most city
A branding exercise is currently underway

x. The destination's offering is superior because it is more relevant to guest's expectations.

Yes A No

Because: Birding, gaming, downtown club experience, and the Underground Railroad.

A2. Attractions are relevant to the expectations of identified market segments.

i. The Resource Audit classifies destination resources and their appeal to Regional, National/Provincial, U.S. and International geographic market segments.

Yes A No

ii. Core attractions are relevant to a tourist market base.

Yes A No

This base is considered to be a:

mass and/or a niche market.

It is characterized as - Birding is niche, shopping and parks are mass, and gaming has elements of each.
 (e.g., golfers, touring families, wilderness canoeists)

This (these) market(s) generated the following number(s) of trips in Ontario in the year 2001.

<u>Market</u>	<u># of Trips</u>
Birding (Canadian only) (excludes same day auto)	166,000
Casino Windsor (excludes same day auto)	2,030,000
Shopping	13,928,000

iii. Attractions appeal to guests from beyond Ontario's borders.

Yes A No

These attractions and the nature of their appeal are:

<u>Attraction</u>	<u>Appeal</u>
Gaming	tax free, low exchange
Parks	clean, safe
Point Pelee National Park	unique
Colasanti's Tropical Gardens	family based
Canada Experience	a chance to visit an foreign country.

iv. The market segments for whom the identified attractions are expected to have a compelling appeal have been identified.

Yes A No

These market segments are:

Adults, young adults (late teens, early twenties), birders, gamers, African Americans.

v. There is a significant core attraction relevant to all market segments on a year round basis. (e.g., Point Pelee National Park)

Yes A No

B QUALITY AND CRITICAL MASS

The Quality and Critical Mass criteria and measures address the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging in:

- core and related activities; and,
- entertainment, shopping and dining.

On completion of Section B, you will have assessed the mass (size) of the destination’s activity and amenities base, and the mass and quality of its entertainment, shopping and dining offerings.

B1. The destination offers a range of memorable experience-creating, core and **on-theme activities** sufficient to sustain interest for more than 24 hours.

i. The core destination experience stands out as memorable to the visitor.

Yes A No

Because:

See core and secondary attractions list (gaming, Pelee Island, Point Pelee National Park, birding, wineries)

ii. The core experience is typically “consumed” over a period greater than 24 hours.

Yes A No

The core experience(s) and its/their typical duration is(are):

<u>Activity (e.g., rounds of golf)</u>	<u>Duration (hrs/days)</u>
Gaming	Hours
Birding	1-2 days
Shopping	Hours

iii. A variety of **on-theme activities** are available to give guests a reason to stay overnight:

Yes A No

Examples of these activities and their typical duration are:

<u>Activity</u>	<u>Duration (hrs/days)</u>
Cruises (Pride of Windsor)	1-4 hours
Detroit Experience	2-10 hours
Art Gallery of Windsor	1-2 hours
Golf	3-6 hours

iv. The average length of stay at the destination is greater than 24 hours.

Yes A No

The average stay is: 0.7 days.

B2. The destination offers a range of memorable experience-creating **core** and **on-theme activities** sufficient to sustain tourist interest on a year-round basis.

i. The destination offers **core** activities on a year-round basis.

Yes A No

These are:

<u>Activity</u>	<u>Season</u>
Gaming, Clubs, Shopping	year round
Point Pelee National Park	year round
Festivals	depends on festival for which season
Boating	not winter
Wineries	summer

ii. The destination offers **on-theme activities** on a year-round basis.

Yes A No

<u>Activity</u>	<u>Season</u>
Pride of Windsor Cruises	summer
Art Gallery of Windsor	year round
Theatre	year round
Golfing	spring, summer, fall
Detroit experience	summer
Amherstburg Gardens	summer

B3. Core activities are easily accessible to a variety of market segments at a range of price points and layers of added value (i.e., richer/more expensive options for getting more out of the experience).

i. Core and on-theme activities are easy to buy.
Product is not easy to purchase in advance.
 Opportunities for guests to purchase access to these activities
 are located at the following:

Yes A No

central point(s) in the destination at: _____

multiple points distributed through the destination at:

points distant from the destination area: _____

(e.g., travel agent, 1-800 number, the internet)

ii. There is a range of options and price points for engaging in core
 or on-theme activities available. (e.g., self-guided tours at \$10; group
 tours at \$15; individual tours at \$25)

Yes A No

These include:

<u>Activity</u>	<u>Approximate Price Range</u>
Casino Windsor	
Point Pelee National Park	
Colasanti's Tropical Gardens	
Shopping Malls	
Fort Malden National Historic Site	

B4. The destination offers easy access to choices across a variety of activities
 attractive to a variety of market segments at a range of price points and
 layers of added value, from most basic to multiple layers, including
 opportunities for relaxation, entertainment, learning, skills development,
 adventure and new experiences, from amused surprise to intense excitement.

i. The destination offers a variety of activities with a range of
 sub-options for each.

Yes A No

<u>Category/Activity</u>	<u>Approximate Price Range</u>
<input type="checkbox"/> relaxation - spas, cruise, park	\$0 - \$80
<input type="checkbox"/> entertainment - bars, symphony, theatre	\$0 - \$25
<input type="checkbox"/> education - Jack Miner, Fort Malden, Art Gallery of Windsor	\$0 - \$40
<input type="checkbox"/> cultural/ historical understanding Fort Malden, Museums, Art Gallery of Windsor	\$0 - \$50
<input type="checkbox"/> skills development - Art Gallery Gallery	\$0 - \$10
<input type="checkbox"/> adventure - scuba diving, birding, sailing, kayaking	\$20 - \$50

ii. This range of activities is well promoted to and understood by guests.

Yes A No

The following means of communication are used to promote the activities available:

CVB Visitors Guide, CVB Website, and the Canada South Festival Network Guide.

iii. This range of activities is easy to buy.

Yes A No

The range of activities is not easy to buy in advance.

Opportunities for guests to purchase these activities are located at the following:

central point(s) in the destination at: _____

multiple points distributed through the destination at: _____

points distant from the destination area: _____

(e.g., travel agent, 1-800 number, the internet)

iv. Groups have cooperatively invested in programming or animating public spaces, gathering and queuing areas.

Yes A No

<u>Group</u>	<u>Activity</u>	<u>Location</u>
Ford City BIA	Beautification	Drouillard Road
Canada South Festival	Bright Nights Festival	Downtown Windsor
Kingsville BIA	Kingsville Fantasy of Lights	Kingsville
Erie Street BIA	Erie St. Street Scaping	Erie Street
Parks & Recreation	Odette Sculpture Park	Windsor Riverfront

B5. The destination offers cultural experience and entertainment options, from basic to venues/ shows/ events credible at regional to larger scales, over a range of price points.

i. The destination offers a range of cultural experience and entertainment options.

Yes A No

These include:

<u>Activity</u>	<u>Approximate Price Range</u>
Carrousel of Nations	\$15.00
Festival Epicure	\$60.00
Expo: A Multi Cultural Festival	\$20.00
International Freedom Festival	\$15.00
Native Cultural Dance Exhibit	\$0
Oktoberfest	\$25.00

ii. Events or venues in the last two years included performances by artists with name recognition beyond the local region.

Yes A No

<u>Event or Venue</u>	<u>Artist(s)</u>
Migration Hall	Stompin' Tom Connors
Casino Windsor	Michael Bolton
Casino Windsor	Julio Iglesias
Blues Festival	Blues Traveller
Chrysler Theatre	Jann Arden

B6. The destination offers a broad range of dining options.

i. The destination offers a range of dining options at a range of price points.

Yes A No

These include:

<u>Restaurant</u>	<u>Average Entrée Price Range</u>
Bubi's Awesome Eats	\$12.50 – \$17.50
Don Luciano's Place Trattoria	\$17.50 – \$20.00
Chatham St. Grill	\$22.00 – \$28.00
Elaine Bistro	\$35.00 – \$45.00
McDonald's	\$ 5.00 – \$ 8.00

ii. A number of restaurants have wine lists with more than 25 labels.

<u>Restaurants</u>	<u># of Labels</u>
Spago Ristorante	60
Casino Windsor	75
Vintage Goose	40
Alan Manor Restaurant	105
Thirteen Russell Steak House	40

iii. A number of restaurants have trained and accredited chefs.

Yes A No

<u>Restaurants</u>	<u>Accreditation</u>
Alan Manor Restaurant	Executive Chef
Big Tomato: An Italian Eatery	Red Seal, certified pastry chef
Elaine Bistro	Ecole Hotelier Lausanne
Il Posta Ristorante	Italian Chef certification
Vintage Goose	Red Seal

iv. A number of restaurants/chefs have name recognition beyond the local region.

Yes A No

Restaurants/chef:
Alan Manor, Il Gabbiano Ristorante, Casino Windsor, Tunnel BBQ,
Vintage Goose, Thirteen Russell Steakhouse

B7. The destination offers a broad range of shopping options.

i. The destination offers a range of retail shopping opportunities including clothing, crafts and memorabilia at a range of price points.

Yes A No

These include:

<u>Store</u>	<u>Quality of Merchandise</u> <i>(low, med. or high)</i>
Freeds	High
Windsor Crossing Premium Outlets	High
Wal-Mart	Medium
Sears	Medium
The Bay	Medium
Dollar Stores	Low

ii. Stores or galleries in the destination area have name recognition beyond the local region (branded items or otherwise).

Yes A No

Examples:
Windsor Crossing Premium Outlets, Sears,
The Bay, Wal-Mart, Pier 1 Imports, LCBO, Old Navy.

C SATISFACTION AND VALUE

The Satisfaction and Value criteria and measures document the extent to which the destination offers its guests:

- a welcome
- satisfied expectations; and
- value for money

and what the destination is doing to enhance its performance in these areas.

On completion of Section C, you will have identified how the destination's guests and outside marketers view its welcome, whether and how the destination measures guest satisfaction, guest and market perceptions of value, and whether and how the destination is investing in improved performance.

C1. Guests feel welcomed into a community that is happy to host, serve or engage them.

i. The destination is considered “friendly” or “very hospitable” by guests and by travel agents and tour operators packaging experiences at the destination.

Yes A No

Sources:

- 2001 Windsor, Essex County & Pelee Island
- CVB's Visitor Information Survey.
- various Accommodation surveys.
- Ontario Travel Information Centre surveys

C2. The destination offers a highly satisfying experience to its guests.

i. The destination carries out regular surveys which track guest satisfaction and their perceptions of value and hospitality:

Yes A No

The CVB does conduct a regular survey from its Casino location, however there is not a broad survey distributed by the CVB or other means in other visitor locations.

ii. The most recent survey indicated that most guests were very satisfied with their destination experience.

Yes A No

97 % very satisfied – CVB 2001 Visitor Information Survey.

C3. The destination is perceived as offering value for money spent.

i. The destination is considered “good value” or “expensive but worth every cent” by guests and by travel agents and tour operators packaging experiences at the destination.

Yes A No

Sources:

Restaurants, good U.S. exchange rate.

ii. Key experience and service prices are monitored and are flat or trending up.

Yes A No

<u>Key experience or service</u>	<u>Current Price</u>	<u>(e.g., up, flat)</u>
Festivals	\$3.00 - \$10.00	Up
Birding	\$5.00 - \$ 6.00	Flat
Point Pelee National Park	\$3.25	Up
Hotels	\$92.00 - \$108.00	Up

The “Almost” rating reflects a lack of monitoring in some areas.

iii. Visitation is trending upwards.

This trend is: Independent of key experience service price trends.

Yes A No

parallel to or independent of
key experience service price trends.

For the following reasons :

Terrorist attacks, security alerts, war,
and the U.S. economic slowdown.

ACCESSIBILITY

The Accessibility criteria and measures assess:

- the ease of getting to the destination;
- the transportation modes that serve it; and
- for waterfront communities, “friendliness” to cruise ships or boat passengers.

On completion of Section D, you will have identified how accessible the destination is to tourists.

D1. The destination is within 2-3 hours drive from a major population centre or international gateway, or a lesser drive time from a regional gateway.

i. The travel time to the nearest major urban market is less than 3 hours.

Yes A No

The travel time is up to one hour.

The population of that centre is: 4.6 million people.

ii. The population within a 3-hour drive time is substantial.

The total population is 25 million.

Yes A No

iii. Drive time from the nearest U.S. border crossing or international airport is less than 2 hours.

Yes A No

iv. Flight time from the international to the nearest regional airport is less than 1 hour.

Yes A No

v. Drive time from that regional airport is less than 1 hour.

Yes A No

D2. Travel from the nearest urban centre or gateway is not unpleasant, and is achievable with minimum effort and discomfort.

i. Travel from the nearest urban centre or gateway is not unpleasant.

Yes A No

The commonly used route(s) is (are):
Windsor-Detroit Tunnel, The Ambassador Bridge, and Highway 401.
There are many transport trucks at these points of entry and the roads leading to them, which can make the trip to Windsor, Essex County and Pelee Island unpleasant.

ii. A direct connection to the destination (e.g., via a shuttle bus service) is conveniently available, or travel by private car is over a route(s) generally accepted as direct and well marked. ✓
Yes A No

The connecting service and/or commonly used route(s) is (are):
E. C. Row Expressway for Windsor Airport, taxi or shuttle,
Robert Q Airbus.

D3. The destination is accessible by alternative travel modes and price options.

i. Alternative modes of travel from the Detroit urban centre/gateway are available. ✓
Yes A No

These include (check those available):

- ✓ private car
- ✓ shuttle bus operated by service provider
- ✓ regularly scheduled public bus service
- train
- ✓ regularly scheduled ferry service
- ✓ private boat
- ✓ private plane
- ✓ other. Please list: possible gondola (futuraity).

ii. If located on the water, the destination is accessible to cruise ships. ✓
Yes A No
It offers a harbour with 8.22 metres of draft and 304 metres of dockwall.
(Dieppe Park)

iii. If located on the water, the destination offers slips to transient boaters. ✓
Yes A No
612 slips are available to transient boaters (mostly in the county).

iv. If located on the water, the destination's cruise ship and/or transient marina slip dockage are located in or close to downtown or the attraction, with attractive and comfortable spaces between them. ✓
Yes A No
There are no marinas in or near the Windsor downtown core.

v. The destination provides visible signage to the area's attractions. ✓
Yes A No
Signage is good in some areas.
(e.g., wine routes and some of the attractions)

E ACCOMMODATIONS BASE

The Accommodations Base criteria and measures assess the breadth and depth of the destination's offering in terms of:

- the range of accommodation classes available;
- the range of locations available; and
- the presence of higher end operators

On completion of Section E, you will have characterized the destination's accommodations base.

E1. The destination offers accommodations across a range of types and a variety of quality levels and price points.

Yes A No

i. The destination offers rooms at a variety of quality levels and price points.

The following number of rooms are available in the following property classes:

<u>Class</u>	<u># of Properties</u>	<u># of Rooms</u>	<u>Price Range</u>
RV Park	11	286	\$25 – \$35.00
Bed & Breakfast	64	186	\$49 – \$165.00
Lodge	0	N/A	N/A
Resort Lodge/Hotel	0	N/A	N/A
Motel – Independent	19	478	\$35 – \$199.00
Motel – Chain	1	51	\$89 plus
Hotel – Independent	2	403	\$120 – \$300.00
Hotel – Chain	8	1,167	\$72 – \$299.00
Independent Inn	8	262	\$58 – \$290.00
Chain Inns	8	785	\$79 – \$229.00
Suites	2	173	\$89 – \$299.00

ii. There is a range of choices in locations relative to attractions/venues, and a range of price points.

Yes A No

As exemplified by:

<u>Property</u>	<u>Distance to Core Attraction (km)</u>
Casino Windsor Hotel	0 (gaming)
Seacliffe Inn	0.7 (Point Pelee National Park)
Best Western Continental	7 (gaming – Windsor Raceway)
Allen's Bed and Breakfast	1.4 (Fort Malden National Historic Site)

iii. This inventory includes representation by “branded” (widely known and respected) higher end operators:

Yes A No

These include:

Hilton, Radisson, Quality Suites, Holiday Inn Select

STEP 3: PERFORMANCE

The PERFORMANCE elements and criteria identify the extent to which the destination is successful and recognized in the market place.

F VISITATION

The Visitation criteria and measures assess the destination's market performance in terms of:

- its visitation numbers and market shares
- its attractiveness to different market segments; and
- its attractiveness over the four seasons of the year.

On completion of Section F, you will have identified the destination's absolute and relative visitation performance.

F1. The destination draws a significant share of the total provincial travel to attractions of its type.

i. The destination attracts a significant number of guests.

Yes A No

In the year 2001, the destination attracted 7.2 million guests, 6.2 million on day visits, 1 million staying overnight. The source for these estimates is the CITIES Project.

ii. The destination attracts a significant share of total VFR/Pleasure motivated travel to Ontario.

Yes A No

In the year 2001, destination visitation captured 14.93 % of the total 29.6 million (#) VFR/Pleasure motivated trips taken by Ontario residents. Its share of those trips was 14.93 %; its share of overnight visits was 6.07 %.

iiA. The destination attracts a significant portion of its visits from beyond Ontario's borders.

Yes A No

In the year 2001, same day guests from the following origin markets identified below accounted for the following proportions of the destination's same day visitation:

Same day visits:

0 (#) or 0% from other provinces
5,748,000 (#) or 93% from the U.S.
7,000 (#) or 0.1% from other international markets
455,000 (#) or 6.9% from Ontario
6,210,000 100% Total

iii. The destination attracts a significant portion of its visits from beyond Ontario's borders.

Yes A No

In the year 2001, overnight guests from the following origin markets identified below accounted for the following proportions of the destination's overnight visitation:

Overnight visits:

15,000 (#) or 1.5 % from other provinces
428,000 (#) or 42.4 % from the U.S.
12,000 (#) or 1.2 % from other international markets
554,000 (#) or 54.9 % from Ontario
1,009,000 100 % Total

iv. The destination's share of visits to the province from markets beyond Ontario's borders are significant.

Yes A No

In the year 2001, destination visits by guests from the following origin markets accounted for the identified share of out-of-province visitation to Ontario.

1 % of the total 91.2 million trips to Ontario by guests from other provinces

34.14 % of the total 18.1 million trips to Ontario by guests from the United States

0.7 % of the total 2.7 million trips to Ontario by other international guests

v. The destination's share of meetings and conventions-motivated travel to Ontario is significant.

Yes A No

In the year 2001, the destination attracted 36,000 meetings and conventions-motivated trips, or 5% of the total meetings and convention motivated trips to Ontario.

vi. The destination's share of visits in Ontario which included activities relying on the destination's core attractions classes is significant.

Yes A No

In the year 2001, destination visitation which included the activities identified below represented the stated shares of all trips in Ontario which included the same activities.

(e.g., 65,000 or 3.8 % of the 1,686,000 trips in Ontario which included visits to historic sites.) Does not include same day U.S. visits.

296,000 (#) or 10.17 % of the 2.9 million trips in Ontario which included Bar/nightclub;

221,000 (#) or 16.42 % of the 1.3 million trips in Ontario which included visiting a casino;

283,000 (#) or 7.11% of the 3.98 million trips in Ontario which included sporting/outdoor activity.

vii. The destination's shares of the visits identified above are significant in comparison to competitive destinations in Ontario.

Yes A No

In the year 2001, the shares identified above compare favourably to the shares held by the destinations shown below:

Destination share vs. Competitor share of Activity

(e.g., 3.8 % vs. the 4.2 % share of the historic site – oriented trips to the ABC site at Theirtown.)

Does not include same day U.S. visits.

16.42 % vs. 47 % share of the Casino-oriented trips to Niagara;
18.67 % vs. 18.07 % share of the birdwatching/wildlife oriented trips to Niagara;
7.11 % vs. 16.12 % share of the sporting activity- oriented trips to Niagara;
10.17 % vs. 14.64 % share of the Bar/nightclub-oriented trips to Niagara.

F2. The destination offering draws from multiple market segments.

i. The destination attracts visitors with differing visitor profiles. Including the following market segments:

Yes A No

(e.g., families with young children)
Young American adults (20 –24 years old)
Casino visitors (U.S. and Canadian)
Weak market for families with young children.

F3. The destination offering draws from market segments over more than one season.

i. Visitation is distributed among multiple market segments over more than one season.

Yes A No

Quarterly distribution of total visitation is distributed as follows:
20% Q1, 25% Q2, 32% Q3, 23% Q4.

Visitation for the young adult segment (as identified in F2.i above) is distributed as follows:
29% Q1, 24% Q2, 29% Q3, 19% Q4.

Visitation for the casino visitor segment (as identified in F2.i above) is distributed as follows:
34% Q1, 22% Q2, 30% Q3, 14% Q4

ii. In terms of overall visitation, there is a balance between same-day and overnight visitation.

Yes A No

As outlined in the Visitation section, there were 7.2 million visitors in 2001, 6.2 million (86%) of whom were day visitors.

G OCCUPANCY AND YIELD

The Occupancy and Yield criteria and measures assess the destination's market performance in terms of :

- accommodations base occupancy; and
- guest expenditure levels.

On completion of Section G, you will have identified the destination's occupancy and expenditure performance compared to norms, provincial averages and the destination's share of visitation.

G1. The commercial accommodations base has occupancy rates in excess of 65%.

i. The annual average accommodations occupancy rate is over 65%.

Yes A No

The rate is 62.7 % for 2002.

ii. Occupancy is spread throughout the year

Yes A No

The quarterly rates are:

59 % Q1, 67 % Q2, 66 % Q3, 57% Q4.

Q1 is high due to convention market in Detroit.

G2. The destination attracts a significant share of total provincial expenditures in the province.

i. The average expenditure per capita for guests on day trips to the destination is equal to or greater than the provincial average.

Yes A No

In the year 2001, the average expenditure per capita for guests on day trips was \$92.61 or 127 % of the \$72.20 average for Ontario.

ii. The average expenditure per capita for guests on overnight trips to the destination is equal to or greater than the provincial average.

Yes A No

In the year 2001, the average expenditure per capita for guests on overnight trips to the destination was \$281.51 or 102 % of the \$276.00 average for Ontario.

iii. The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips to Ontario.

Yes A No

In the year 2001, total spending by guests on day trips to the destination was \$468.6 million. Total spending by all tourists on day trips in Ontario was \$1.6 billion. The destination's share of total spending by these tourists was 29.9%.

iv. The destination's share of expenditures by guests on overnight trips is equal to or greater than its share of overnight trips to Ontario.

Yes A No

In the year 2001, total spending by guests on overnight trips to the destination was \$182.8 million. Total spending by all tourists on overnight trips in Ontario was \$2.6 billion. The destination's share of total spending by these tourists was 6.9%.

H CRITICAL ACCLAIM

The Critical Acclaim criteria and measures address the extent to which the destination is recognized as:

- “must see/must do” on general grounds or those more specific to a given type of experience;
- having a profile that contributes to the attractiveness of Ontario and Canada as a destination; and
- a top-ranked place to visit.

On completion of Section H, you will have identified whether and how the destination is recognized as standing out from its competitors.

H1. The destination is considered as “must see/must do” and is recognized as a symbol of its type of travel experience.

i. The destination is at the near or top of the list of places out-of-town guests must be taken, or things guests must do when “seeing the sights” in the wider travel region.

Yes A No

No, not at this time.

ii. The destination is at or near top of mind when considering “must see/must do” places or activities offering the same type of travel experience as the destination.

Yes A No

Because: Birding, proximity to U.S., shopping, Casino Windsor.

H2. The destination has a role in branding/ marketing Ontario and/or Canada.

i. Destination imagery of, and/or text about the destination or its core attraction(s) is used in promoting Ontario and/or Canada.

Yes A No

This imagery and/or text is placed in the following media:
Ontario Tourism Marketing Partnership and Canadian Tourism Commission advertises birding and gaming.

H3. The destination or its core attraction(s) have been ranked “best in class” or “top tier” in consumer or industry rankings.

i. The destination or its attraction(s) has (have) been ranked as “Number 1,” “Best in Class” or “top tier.”

Yes A No

This ranking was given by:

Point Pelee National Park: Named in top 10 places to visit by Birder’s world Magazine.

Blues Fest voted best Blues Festival in Michigan - 2001

Alan Manor awarded 2001 Wine Spectator Award of Excellence. Advertised in top 50 North American Restaurants in GQ Magazine.

STEP 4: FUTURITY

The FUTURITY elements and criteria identify the extent to which the destination is investing in its future as a place with viable and continuing attractiveness to evolving markets.

I DESTINATION MARKETING

The Destination Marketing criteria and measures assess the extent to which the destination:

- targets viable markets; and
- invests in managing and promoting its tourism marketplace.

On completion of Section I, you will have identified whether and how the destination is actively matching its products to the expectations of the tourism marketplace.

11. The destination’s product offerings are created and packaged to attract significant market segments with prospects for stability if not growth.

i. There is market demand for the destination’s type of offering

Yes A No

This demand is demonstrated by 7.2 million visitors in 2001. The region does not, however, offer comprehensive package deals to the F.I.T. market.

ii. Market demand to the destination’s type of offering is stable or growing.

Yes A No

This demand trend is demonstrated or forecast by:

September 11, slowing U.S. economy and war with Iraq have and will deter American tourists.

12. There is a Destination Marketing Organization (DMO) in place with funding sufficient to sustain awareness and motivate travel from target markets.

i. There is a DMO in place with a focus on the local destination vs. a larger travel region.

Yes A No

The DMO is:

Windsor, Essex County & Pelee Island CVB.

ii. The DMO is funded at a level sufficient to reach target markets through print and electronic (e.g., Internet, toll-free phone lines, etc.) media.

Yes A No

Communications represents 52% of the DMO's total \$2.1million operating budget.

iii. The DMO conducts surveys which track the influence of marketing on guest visits.

Yes A No

3% of 400 surveyed visitors have their choice of destination influenced by the destination's marketing communications efforts, according to the CVB 2001 Visitor Information Survey.

13. A tourism development and marketing strategy is in place.

i. A destination development and marketing strategy focusing on growth in visitation and/or yield has been developed and is being implemented.

Yes A No

The strategy is called CVB Marketing Plan.

Its key goals are:

Increase the number of visitors to Windsor, Essex County & Pelee Island.

Its key objectives are:

To increase membership sales and revenues through an aggressive marketing campaign, value-added programs, and an improved Bureau profile within the community

14. Performance towards the development plan's objectives is being monitored.

i. A program for tracking progress towards objectives is in place.

Yes A No

Its key variables are:

number and origin of visitors, money spent by visitors.

These are measured by:

surveys at destination attractions; CITIES Project.

15. Customer service training programs are in place.

i. There is a customer service training program in place at the key experience/activity providers, as well as programs for the service community generally.

Yes A No

The programs are offered by:

Smart Serve, Super Host offered by Ontario Tourism Education Corporation.

J PRODUCT RENEWAL

The Product Renewal criteria and measures assess the extent to which the destination is making capital investments in its attractiveness into the future.

On completion of Section J, you will have documented the status and magnitude of destination investment in the future.

J1. Re-investment and new investment is occurring to enhance or develop facilities relevant to the quality of the tourist experience.

i. In the past five years, capital has been invested in facility renewal, expansion or development.

Yes A No

<u>Location</u>	<u>Investment (\$)</u>
1999: Windsor Crossing Premium Outlet	\$ 2.5 billion
1999: Devonshire Mall	\$ 5.7 million
2000: Windsor Raceway	\$ 11.3 million
2000: Nazrey AME Church	\$ 790,000

ii. A significant portion of that investment occurred in the past two years.

Yes A No

100 %

iii. This investment is relevant to the quality of the tourist experience.

Yes A No

Because: They improved the quality and experience of several core tourist destinations.

iv. Core attractions demonstrate ongoing commitment to re-investing in programming in order to enhance the core experience.

Yes A No

Because:

Gaming, festivals, and shopping establishments re-invest in such ways. Wineries and the Underground Railroad experience do not.

K MANAGING WITHIN CARRYING CAPACITIES

The Managing Within Carrying Capacities criteria and measures assess the extent to which the destination is aware of and manages within the capacity thresholds of its:

- local economy;
- ecosystems setting and soft services infrastructure;
- guest's satisfaction levels
- hard services infrastructure; and
- administrative systems.

On completion of Section K you will have documented the destination's ability to manage the systems that sustain it and its attractiveness to the tourism marketplace.

K1. Destination visitation generates economic benefits to the host community.

i. Guest visits and expenditures make a net positive contribution to the local economy.

Yes A No

This is demonstrated by: large number of jobs created by sectors like the gaming, food and beverage and hospitality.

ii. Benefits and costs are balanced equitably across municipal boundaries.

Yes A No

Because: benefits are generally felt by the City of Windsor.

K2. Visitation does not consume local resources or increase their values to an extent that the local population is negatively affected.

i. Attractiveness of the destination to recreational or retirement home or investment markets has not bid up the cost of housing to the extent that it is unaffordable to the locally employed population.

Yes A No

This is documented in: stable home ownership rates.

ii. Where housing cost impacts are occurring, a response plan is being implemented.

Yes A No

The response plan is described in: N/A

iii. Servicing guest visitation, or the investment to attract and accommodate it, does not consume labour or materials to the extent that their cost or availability to other sectors is impairing those sectors' profitability.

Yes A No

This is documented in: stable investment in other sectors, available labour for other sectors.

iv. Where resource cost or availability impacts are occurring, a response plan is being implemented.

Yes A No

This is documented in: N/A

K3. Trained labour is available to serve visitation demands at a level that maintains guest satisfaction.

i. There is a labour pool sufficient to accommodate current and projected levels of visitation.

Yes A No

This is documented in complaints from food and beverage establishments.

ii. Where labour pool constraints are occurring, a response plan is being implemented.

Yes A No

This is described in:

HRDC, St. Clair College training programs,
OTEC training, Casino training.

iii. Guest surveys confirm satisfaction with hospitality and service.

Yes A No

This is demonstrated in:

CVB 2001 Visitor Information Survey, accommodation surveys,
and Ontario Tourism Information surveys.

iv. Where dissatisfaction has been identified, a response plan is being implemented.

Yes A No

This is described in:

CVB and Police respond personally to complaints they receive.

K4. Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by destination visitation.

i. There is an environmental monitoring program in place which provides early warning of capacity thresholds being approached

Yes A No

This is described in: Reports on air and water pollution which note levels at which human health can be affected.

Its participants are:

Essex Region Conservation Authority, regional municipalities,
Great Lakes Institute.

ii. There is a “wellness” monitoring program in place that provides early warning of whether quality of life impact thresholds are being approached.

Yes A No

This is described in: N/A

iii. Evidence from formal monitoring programs, or informal observations indicates that no capacity/thresholds are being exceeded.

Yes A No

If thresholds are being exceeded, they are notable in the following areas, at the following periods:

Area Period
Air quality declines during hot summer months when heavy traffic exists according to the Ministry of Environment and Energy.

K5. Growth in visitation to the destination is not exceeding the carrying capacity threshold of enjoyment to the dissatisfaction of guests.

i. Overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience are not being raised by guests surveys or by managers of facilities and resources.

Yes A No

Bar and nightclub managers in Windsor’s City Centre report that overcrowding and overuse diminish the quality of the guest experience. The Windsor Police are working to limit the negative impacts through their policing.

ii. If issues are raised, they relate to one or two peak weekends only. Traffic issues such as transport trucks on busy streets, downtown vehicle and pedestrian congestion can be a year round issue throughout the region.

Yes A No

iii. A response to identified issues has been defined and is being implemented.

Yes A No

The response is described in: CVB Marketing Plan, Tourism section.

K6. Infrastructure is available to accommodate current or projected levels of demand without exceeding carrying capacities.

i. There is current/planned water treatment and delivery capacity to accommodate current and projected levels of visitation

Yes A No

The plan is described in: City of Windsor, County of Essex and Pelee Island official plans.

ii. There is current/planned sewage treatment and trunk capacity to accommodate current and projected levels of visitation.
 Yes A No

Described in:
City of Windsor, County of Essex and Pelee Island official plans.

iii. There is current/planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation.
 Yes A No

Described in:
City of Windsor, County of Essex and Pelee Island official plans.

iv. Assessments of the environmental effects of infrastructure expansions have been completed, with effects considered mitigable and acceptable, as documented in:
 Yes A No

City of Windsor, County of Essex and Pelee Island official plans.

K7. Municipal entities with approval authority are able to address development applications in a timely manner.

i. Local and upper tier (where present) Official Plans or other applicable planning documents have tourism-related objectives and policies in place.
 Yes A No

The following objectives and policies are in place:

Local Level: City of Windsor Official Plan Objective 6-11-1-11, pg. 6-55

Upper Tier: N/A

ii. There is a political will to move forward with those projects considered to further the objectives expressed in the Official Plan or other applicable planning documents.
 Yes A No

This is exemplified by:
some progress made on City Centre Revitalization blueprint. However, the long and continued delays in approving a proposal for the Western Super Anchor/City Centre West Community Improvement Plan may suggest a lack of political will by Windsor's City Council in seriously promoting tourism in Windsor.

iii. There are sufficient administrative resources in place to efficiently manage review, approvals and permit processes.
 Yes A No

The staff complement is 3 in the city, 2 in the county, with N/A consulting able to provide assistance as required.

APPENDIX THREE

Lessons Learned from Completing the Premier-ranked Tourist Destinations Workbook

One of the main lessons learned is that there are several limitations to the Premier-ranked Tourist Destinations Workbook itself. Although the areas outside Ontario's borders were recognized in some questions, a more extensive focus on cross-border visitation is required to properly evaluate whether or not a destination is Premier-ranked. Several questions in the Visitation criterion rate the destination on its share of Ontario-origin travel. Destinations like Windsor, Niagara Falls and Ottawa have high levels of visitation from non-Ontarians, so these questions ought to refer to the share of Ontario-destined travel. Changes to this end have been made in the workbook included in Appendix One. Several questions have also been inserted into the Workbook to reflect omissions identified by the project staff. The staff has proposed other potential revisions for consideration by the Ministry of Tourism and Recreation that are not included in this report.

The Workbook does not address convention and business travel, other than a brief mention in Element F of the Performance section. These visitors often have time to take in tourist experiences before or after their business is completed. The CVB works hard to grow the convention market of the region, but there is no place in the Workbook to recognize this marketing effort. An additional section has been proposed to evaluate the destination's performance in the convention and business travel market. The Workbook also does not address in depth the role of BIAs, Chambers of Commerce and town councils in improving the tourism experience in their communities above and beyond the overall tourism planning and marketing of the DMO. Finally, the Workbook's Product section should be revised so that the questions are presented and arranged in a more functional sequence.

Several changes were also made to the Resource Audit to reflect the particular realities of a primarily urban destination. Specifically, the Natural Parks and Sites section was re-organized to cover the breadth of park types present in a city, replacing Crown Land with new Municipal and Nature categories. The "Sportfishing" category was renamed "Angling" for greater accuracy. Two new categories were added to reflect the role of minor-league sports in generating visitation, while the two categories identifying Franchise Venues and Sports Events were amended to include the qualifier Major League. A row was added to capture the unique contribution of Inns to the accommodations market. Three rows were added to illustrate the convention infrastructure present in the area. The Live Theatre category was renamed Live Theatre/Classical Music to more clearly define what it included. In addition to these changes, a new column was added to record the total number of offerings in each category and the "Desired" category was renamed "Proposed" for the sake of clarity. Finally, a numeric scale from 0-3 replaced the colored ovals used in the original Workbook.

BIBLIOGRAPHY

Internet Sources

www.bbcanada.com - national - Bed & Breakfast accommodations

www.boatingontheweb.com/canada.htm - national/American - Canadian and American marinas

www.campgrounds.org - provincial - privately owned campgrounds

www.canadasouthfestivals.com - regional- Canada South Festival Network

www.canada-sportfishing.com - national - fishing information

www.canadatourism.com - national - Canadian Tourism Exchange

www.canadiantrails.com - national - bicycle tours

www.citysearch.com - American - information on various cities

www.copernic.com - international - search engine

www.dogpile.com - international - search engine

www.erca.org - regional - Essex Region Conservation Authority

www.golfguide.ca - national - guide to golf courses

www.google.ca - international - search engine

www.gov.on.ca - provincial - Government of Ontario

www.mapquest.com - international - interactive maps and directions

www.metrotimes.com - American - Metro Detroit alternative weekly newspaper

www.ofo.ca - provincial - Ontario Field Ornithologists (birding)

www.ontarioexplorer.com - provincial - map-based tourism and travel search platform

www.ontarioguide.com - regional - tourist information

www.ontariotravel.net - provincial - Government of Ontario travel information

www.parkscanada.ca - national - National Parks of Canada

www.scn.org - international - birding information

www.soto.on.ca - provincial - Southern Ontario Travel Information

www.tee-off.ca - national - golf information

www.tmssystem.com - national/American - golf courses in Ontario, Michigan & Ohio

www.tourism.gov.on.ca - provincial - Ontario Ministry of Tourism and Recreation

www.tourismpartners.com - provincial - Ontario Tourism Marketing Partnership

www.travelcanada.ca - national - Canadian Travel Commission

www.websitedog.net/clubbin.html - regional - bar and nightclub listings

www.windsorlife.com - regional - community magazine

www.windsorx.com - regional - bar and nightclub listings

www.wineroute.com - provincial - information on wineries

www.yachtclub.com - national - yachting information

www.yahoo.com - international - search engine

Paper Resources

Canada South Festival Network, *Festivals and Events 2002*.

Leamington and District Chamber of Commerce, *Southern Latitude, Friendly Attitude, 2002*.

Malone Given Parsons Ltd., *Premier-ranked Tourist Destinations: An Evaluation Framework and Its Testing in the South Georgian Bay Region, 2001*.

Windsor, Essex County & Pelee Island Convention & Visitors Bureau, *2002 Marketing Plan*.

Windsor, Essex County & Pelee Island Convention & Visitors Bureau, *2003 Marketing Plan*.

Windsor, Essex County & Pelee Island Convention & Visitors Bureau, *2002-2003 Visitor Guide*.

Windsor, Essex County & Pelee Island Convention & Visitors Bureau, *2001 Visitors Information Survey*.

Windsor-Essex County Development Commission, *Area Facts, 2001*.