
City of Burlington Tourism Vision Report

Prepared for The City of Burlington

By



ECONOMIC GROWTH SOLUTIONS INC.

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EXECUTIVE SUMMARY

A clear tourism vision helps the City of Burlington to achieve two fundamental goals. First, a vision is required to attract tourism and enhance economic development. Actions consistent with this goal help to market Burlington within the wider tourist market. The vision contributes to improving Burlington's tourism product by identifying and planning municipal project and program priorities. A vision also conveys a high quality of life to investors and employers. Secondly, a vision is required to meet the interests of Burlington residents as it relates to tourism. Throughout this study, Burlington residents consistently stated they see high quality local tourism destinations, attractions and events as important to their quality of life.

In considering the recommended tourism vision, it is important to understand that tourism is not just an activity, but rather an important sector of the economy and that the City of Burlington's tourism sector is a player in the global tourism economy. In fact, many of the City's most significant tourism oriented attractions and features are very much in sync with global tourism market trends.

Tourism is the world's largest industry, valued at \$6.8 trillion.

- World Tourism grew steadily at 4% annually up to 2000.
- The World Tourism Organization ("WTO") predicts tourism will continue to grow at approximately 4% annually from 2003.
- The aging of the "baby boomers" over the next 15 years will strengthen tourism activity worldwide and certainly for Burlington.

This report documents the Tourism Vision identified through an extensive community consultation process. The process included the development of a vision and strategic directions through a Tourism Vision Workshop on November 14, 2003.

The original need for a Tourism Vision was identified during the Strategic Plan, *Future Focus V*, which also recognized that tourism plays an important role in enhancing the local economy, and at the same time ensuring that the quality of life enjoyed by community residents is maintained.

The Proposed Tourism Vision is:

“Burlington will provide a distinct tourism experience focused on the waterfront, downtown and natural features and attractions that will respect and enhance the quality of life of the community”.

Burlington’s tourism vision has seven key elements, as follows:

1. Create quality tourist destinations that also enhance the high quality of life for Burlington residents.
2. Continue developing the waterfront in a manner that will attract visitors and provide long term benefits to residents.
3. Create a distinct and vibrant downtown experience for tourists.
4. Develop outdoor and natural area tourism activities that profile Burlington’s unique natural areas, features and attractions.
5. Support signature and hallmark attractions that create excitement and enhance the City’s tourism profile.
6. Foster energy and excitement as essential elements of Burlington’s attractiveness as a destination.
7. Provide a memorable tourism experience for visitors who will want to come back again and again.

Proposed strategic actions, budget implications, timing and staffing responsibilities for achieving the vision are identified within this report.

Members of the public and a wide range of stakeholders played an important role in guiding the development of the vision. Their consolidated comments based on the community-wide survey is attached as Supplementary Report A.

An extensive background research process was completed. It involved interviews with politicians and officials, survey of other municipalities, a Council Workshop and Internet-based research. Additional tourism product and market research and analysis, as well as results of stakeholder input sessions are included within Supplementary Report B.

1 – INTRODUCTION

During the summer of 2002, the City of Burlington retained Economic Growth Solutions Inc. to undertake a comprehensive community consultation process in order to develop a Tourism Vision for Burlington. The need for a Tourism Vision was identified during the Strategic Plan, *Future Focus V*, which also recognized that tourism plays an important role in enhancing the local economy, and at the same time ensuring that the quality of life enjoyed by community residents is maintained.

Tourism in Burlington is undergoing significant change. The recent announcement of a \$20.3 million redevelopment project for Burlington's downtown and waterfront is expected to lever \$100 million in direct private sector investment. The Royal Botanical Gardens has received funding to undergo a significant expansion. The Burlington Arts Centre has recently expanded and there is a study underway to determine the feasibility of developing a performing arts facility. The City of Burlington is actively pursuing the purchase of the 20-acre Ministry of Transportation site, next to Joseph Brant Hospital, to be redeveloped as part of the waterfront project.

Team Burlington has been formed to foster tourism and economic development and will be located in the new downtown parking facility on Locust Street. In 2002, Tourism Burlington received one time funding of \$40,000 toward a co-op marketing program. With these changes comes the opportunity to develop a plan for the future, a vision for tourism in Burlington that all key stakeholders, as well as community residents, can support.

STUDY OBJECTIVES

The key objectives of this study were as follows:

1. To develop a Tourism Vision for consideration by City Council, and an approach for implementing it, that reflects the current and future needs of Burlington for tourism development.
2. To undertake a comprehensive community consultation process to ensure that the vision developed reflects the community's aspirations for tourism.

3. To determine the level and type of support for tourism and to identify issues to be addressed.
4. To prepare a situation analysis of tourism in Burlington, identifying unique selling points, products, and markets, as well as specific strengths, weaknesses, opportunities and threats.
5. To review the experience of other municipalities, in order to understand alternative approaches and levels of effort associated with tourism development and marketing at the municipal level.
6. To recommend strategic directions and specific actions for achieving Burlington's tourism vision.

DEFINITION OF TOURISM

There are a wide range of possible definitions of tourism, but that used by the World Tourism Organization has broad applicability:

“Tourism comprises the activities of persons travelling to and staying places outside their usual environment for not more than one consecutive year for leisure, business and other purposes”.

Tourism encompasses both same day and overnight travel. Pleasure or leisure travel is one of a number of motivations that constitute tourism. Others include visiting friends and relatives, business trips, and even other personal trips which involve travel outside the person's usual environment. The Canadian Tourism Commission and Statistics Canada arbitrarily define the distance of travel that constitutes tourism to be 80 km or more, while the Province has typically used 40 km.

STUDY PROCESS

This study was undertaken over a period of several months and involved the following key activities:

- ◆ A review of existing studies, documents, plans and data associated with tourism in Burlington.

- ◆ A review of relevant documentation from other comparable municipalities, including a review of web sites.
- ◆ Interviews/discussions with key stakeholders from the following groups /organizations: members of City Council, members of the study Steering Committee; members of Team Burlington; Tourism Burlington; other destination marketing agencies in the area; officials at major tourist attractions in the region; officials from the Ministry of Tourism, Culture and Recreation.
- ◆ Preparation of a situation analysis of Burlington's tourism industry.
- ◆ Examination of the roles of destination marketing organizations for other comparable municipalities in Ontario to identify relevant initiatives that could be implemented for Burlington.
- ◆ Conduct a comprehensive community consultation process consisting of the following components:
 - Stakeholder Interviews
 - Focus Group Sessions
 - Preliminary Council Workshop
 - Mail-out survey of Burlington residents regarding their attitudes towards, and extent of support for, tourism development
 - Tourism Vision Workshop.
- ◆ Prepare an overall Tourism Vision Report for the City of Burlington.

Overall, the Tourism Vision process provided an extensive opportunity for all Burlington residents to influence future directions and strategies. The results of the process begin in the next Section – Recommended Tourism Vision.

2 - RECOMMENDED TOURISM VISION

VISION OF THE FUTURE OF TOURISM IN BURLINGTON

The recommended overall tourism vision is based on strong support and input from Burlington's tourism stakeholders and residents:

“Burlington will provide a distinct tourism experience focused on the waterfront, downtown and natural features and attractions that will respect and enhance the quality of life of the community”.

This vision is intended to help the City of Burlington with the following:

- ◆ Attracting tourism development and enhancing existing tourism events and attractions
- ◆ Marketing Burlington into the wider tourism market
- ◆ Identifying and scoping planning and municipal policy.

This tourism vision sets the stage for political choices leading to economic development, land-use and budget allocations that will support the orderly development of the tourism industry in the city in a manner consistent with the aspirations of its residents.

Key Elements of the Vision

The key elements or components of the vision are as follows:

- ◆ Create quality tourist destinations that also enhance the high quality of life for Burlington residents, that achieves:
 - Service excellence
 - Four season activities
- ◆ Continue developing the waterfront in a manner that will be a draw for tourists and provide long-term benefits to residents, that involves:

- Re-creating the excitement of the past as part of the new dynamic urban waterfront centre
 - Enhanced boating, beach, trails, events
 - All year round activities, especially Spencer Smith Park
 - Transient marina and pier at the foot of Brant Street
- ◆ Create a distinct and vibrant downtown experience for tourists, that encompasses:
 - A clear identity
 - A stronger east-west orientation
 - A place to relax throughout the year
 - Boutiques, restaurants, music, entertainment, arts & culture
 - Fine dining
- ◆ Develop outdoor and natural area tourism activities that profile Burlington's natural areas, features and attractions with:
 - Support for the eco-tourism experience with appropriate infrastructure
 - Support for RBG expansion in form of targeted infrastructure improvements and joint tourism marketing opportunities
 - Expanded trails
 - Escarpment interpretative opportunities
 - Cooperation with Centre for Inland Waters to develop natural science interest attraction
- ◆ Support signature and hallmark attractions that create excitement and enhance the City's tourism profile:
 - Unique anchor
 - Could tie-in with Royal Botanical Gardens, Arts Centre, future Performing Arts Centre,
 - Music city, events and attractions year-round

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- Bateman works gallery
- Tall ships, solarium

- ◆ Foster energy and excitement as essential elements of Burlington's attractiveness as a destination, through:
 - Banners
 - Flags on lights
 - Bold signage
 - City-wide carnival
 - "Symphony of Fire" type events
- ◆ Provide a memorable tourism experience for visitors who will want to come back again and again, through:
 - Enhanced and expanded attractions and festivals
 - Expanded activities through shoulder season.

3 - STRATEGIC DIRECTIONS, ACTIONS AND IMPLEMENTATION

TOURISM SERVICE DELIVERY MODEL FOR REALIZING THE VISION

As part of the study process we have reviewed the service delivery model related to tourism with a view to ensuring that an appropriate organizational framework is in place to effectively implement the tourism vision. Currently services provided by Tourism Burlington are primarily focused in areas of visitor services and meetings and conventions with limited resources in place to market Burlington as a tourist destination to the consumer or leisure travel market.

In order to effectively achieve the vision and capitalize on the unprecedented tourism development and economic growth opportunities that are taking place over the next 3-5 years, the City will need to ensure the following four (4) core service areas exist as part of the service delivery model. Within each of the identified service areas, there are options for how the service is provided and the level of approved resource.

VISITOR SERVICES

- Currently a core service provided through operation of Visitor's Centre, production of annual Visitor's Guide and development/maintenance of Tourism web-site.

MEETINGS CONVENTIONS AND HOSPITALITY

- Includes meeting/convention planning services, co-promotion of local products and services and hospitality services for visitors

FESTIVALS AND EVENTS

- Forecast as growth area for Burlington tourism encompassing new festivals and events, event marketing, multi-event tourism packaging etc.

SPORTS TOURISM

- Assisting local organizations with coordinating sport/other competitions (e.g. national/provincial championships) and partnering with neighbouring communities in hosting major games and international events.

In addition to focusing on these areas, which are seen as having the best “fit” for tourism development in Burlington, **destination marketing** also needs to exist as an overriding strategic function related to the delivery of tourism services. In doing so, the necessary marketing strategies and plans including branding, product development, advertising and media relations will be in place to influence travel decisions particularly with the targeted service areas.

STRATEGIC DIRECTIONS AND ACTIONS THAT WILL DELIVER THE TOURISM VISION FOR BURLINGTON

The City of Burlington is recognized across Ontario for leadership in the manner within which it establishes a Vision and Mission and strategic directions and actions that deliver positive change. Since 1987, the City’s strategic plan *Future Focus* has documented new directions that help the community move forward with confidence. Future Focus clearly defines the path forward by identifying: strategic Issues, strategic directions and actions. Identifying lead roles and target dates further assists implementation.

The following are key strategic directions essential to the implementation to the Tourism Vision:

1. In conjunction with Tourism Burlington and in a timely fashion, the City of Burlington should conduct a review of its tourism service delivery model with a focus on ensuring effective and cost efficient delivery options are in place over the next three years related to each of the identified core areas: Visitor

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Services, Meetings, Conventions and Hospitality, Festivals & Events and Sport Tourism.

2. The City of Burlington should continue to play an ongoing role in facilitating dialogue and consultation among the key public and private sector tourism stakeholders, and incorporating tourism values more explicitly into its planning and policies.
3. Independent Burlington tourism branding should be developed which is consistent with the City's new overall branding.
 - The tourism brand needs to be designed so that Burlington is seen as a destination
 - A complementary logo and slogan need to be developed specifically for tourism in keeping with the City's Brand.
4. The City should provide support for eco-tourism, both in terms of infrastructure and marketing/ promotion.
 - Cross market with B&Bs
5. Stronger overall tourism marketing and promotion should be undertaken, including:
 - Strong web-based publicity and advertising
 - Banners and highway gateway signs
 - Internal trail blazing
 - Tourism slogan or tag line which clearly positions Burlington in the tourism marketplace
 - Complementary public relations and promotional activities.
6. Highway signage/ signature icon should be developed, tying-in with the following elements:
 - Visible, distinctive, eye-catching signage
 - Use of local media
7. Reposition local festivals and events to attract larger tourist market:

- Market Sound of Music as a packaged event and develop related music-oriented attractions, festivals and events
- Build on Burlington's strength, diversity and versatility in theme areas such as music. Foster linkages, coordinate and bring together key elements.

8. Give tourists a “Whole City” experience:
 - Link attractions and connect the experiences
 - Ensure it is easy for tourists to get around
 - Shops, studios and educational experiences
9. Ensure that residents continue to be partners in tourism
 - Initiate appropriate communications/awareness regarding tourism and its ongoing benefits to the community.
 - Encourage local residents to be tourism ambassadors.
 - Consultation with residents regarding new developments and initiatives, as appropriate.
- 10 Enhance the tourism experiences related to sport:
 - Take advantage of existing Burlington ‘sports events’ to co-market and cross market
 - Leverage with neighbouring communities, in particular Hamilton
 - Encourage sports tournaments and events.
 - Stage a large sporting event.

PROPOSED STRATEGIC ACTIONS AND KEY IMPLEMENTATION TASKS

The following recommendations are based on the findings from tourism and community stakeholder workshops held in Burlington on August 15, 16 and 20, 2002, the Tourism Vision Workshop held on November 14, 2002, interviews with tourism, civic and community leaders, and the Tourism Survey. They are also based on our extensive experience in developing tourism strategies for other communities and regions of similar size in Ontario and elsewhere.

Our recommendations for achieving the tourism vision have been divided into immediate strategic actions to be taken over the next 1-2 years and a longer term strategic action to be undertaken over the next 2-5 years.

The strategic actions have been listed in order of priority as follows:

PROPOSED IMMEDIATE STRATEGIC ACTIONS TO BE UNDERTAKEN IN 2003

| 1. | Strategic Action | Timeframe | Lead Role | ESTIMATED COST |
|----|---|------------------------|--|---|
| | IMPLEMENT TOURISM CREATIVE STRATEGY RELATED TO NEW CITY BRAND | 2 nd Q 2003 | Tourism Burlington | \$5,000 (Tourism Burlington funding – current initiative within approved budget) |
| | IMPROVE TOURISM BURLINGTON WEBSITE | 2 nd Q 2003 | Tourism Burlington | \$10,000 (Tourism Burlington current initiative within approved budget) |
| | OPTIMIZE RELOCATION OF VISITORS CENTRE TO NEW DOWNTOWN LOCATION | 3 rd Q 2003 | Tourism Burlington/ City of Burl. | Fully funded in new facility project budget |
| | DEVELOP TOURISM ORIENTED HIGHWAY/STREET SIGNAGE | 1-2 years | Tourism Burlington w/ MTO, TODS, Halton TODS, & City of Burl. | To be determined |
| | ENHANCE LINKAGES AMONG THE CITY'S TOURISM EXPERIENCES | 1-2 years | Tourism Burlington w/ Team Burlington | Included in website, brochure, printing & signage costs |
| | STRATEGICALLY ENHANCE SPORTING EVENTS TOURISM ACTIVITY | 1-1½ yrs. | Tourism Burlington | \$77,000 -To be offset by Trillium funding. |
| | REPOSITION EXISTING AND DEVELOP NEW FESTIVALS AS A DISTINCT TOURISM ATTRACTION CENTERED ON MUSIC THEME. | 1-2 years | Tourism Burl., & City Parks & Rec. | \$25-50,000 (cost of expansion feasibility study depending on scope of Terms of Ref. Included in Leisure Packaging costs. |

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| 8. | ESTABLISH ENHANCED TOURISM BASED PERFORMANCE MEASURES AND IMPLEMENT ENHANCED VISITOR INFORMATION TRACKING SYSTEM | 1-2 years | Tourism Burlington /City of Burlington | |
| 9. | PROMOTE THE DOWNTOWN EXPERIENCE | Current to 3 years | Tourism Burlington | Included in website, signage & Visitor Guide costs. |
| 10 | INVOLVE COMMUNITY PARTNERS IN THE TOURISM DEVELOPMENT PROCESS | 6 months – 1 year | Tourism Burlington/ City of Burlington | \$5,000 with \$2,500 from tourism partners |
| 11 | PROMOTE TOURISM IN NATURAL AREAS AND ATTRACTIONS | | Tourism Burlington w/ RBG, BTA, HRCA and tourism partners | \$5,000 for map (Tourism partner portion would be \$2,500and Tourism Burlington's portion would be \$2,500) |

SUMMARY OF STRATEGIC ACTIONS – DETAILS & KEY TASKS

1. IMPLEMENT TOURISM CREATIVE STRATEGY RE NEW BRAND

| Details | Key Tasks |
|--|---|
| <p>The need to develop a distinctive tourism branding was identified during the workshops. This branding would capture the unique appeal of Burlington as a destination to visit and provide a focus for Burlington’s image in a very competitive marketplace. It would give Burlington a higher tourism profile and help answer the question, “Why visit Burlington?” Tourism Burlington would be able to use the branding to develop its own communications strategy and provide a common theme for promotional materials, signs, banners and other venues. The City of Burlington has recently developed an attractive new brand to enhance the city’s image and provide a new corporate theme.</p> | <p>Complete work with graphic design agency to produce a distinctive tourism brand.</p> <p>The approach would be to incorporate the new City brand in the tourism branding initiative and give it a distinctive tourism “hook” which would appeal to potential visitors. Tourism Burlington’s current Marketing Plan for 2002 identifies this branding initiative and has hired a creative design firm to come up with a new tourism sub-brand design for Burlington.</p> |

2. IMPROVE TOURISM WEB SITE

| Details | Key Tasks |
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| <p>Tourism Burlington has an existing Internet web site, www.tourismburlington.com. The web site has been reviewed and, in order to give Burlington a higher profile in the tourism marketplace, the site needs upgrading and improvement.</p> <p>It needs to be more interactive and appealing. The site also needs to be able to satisfy the needs of particular markets.</p> <p>Components dealing with Meetings and Convention Planning, Sporting Event Planning, and Leisure Packaging need to be added to appeal to the corporate meetings, sports and recreation, and the leisure travel markets. Burlington’s tourism partners, especially attractions, hotels, motor inns, bed and breakfasts, restaurants, fine shopping and attractions should be provided with opportunities to buy advertising space on the site, with reciprocal linkages to their own sites. Tourism Burlington has hired a web site designer, to provide site improvements.</p> | <p>Tourism Burlington to work with web site design agency to complete the upgrading of the Tourism Burlington web site, which will introduce scenic photos, maps, etc.</p> |

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3. OPTIMIZE RELOCATION OF VISITORS CENTRE TO NEW DOWNTOWN LOCATION

| Details | Key Tasks |
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| <p>The relocation of the Visitors Centre will move the facility from a park setting into the downtown core in close proximity to the new Brant Street Pier and Marina. While it is anticipated the relocation will complement the expected increase in tourist visitation to the downtown core, it is important that attention be given to promoting this new location particularly over the next couple of years.</p> | <ul style="list-style-type: none"> • Complete necessary investigations to address effective way finding from highway and ensure strong visual identity for Visitor Centre from downtown and waterfront locations • Implement enhanced visitor information capabilities (e.g. electronic digital services/messaging) • Fully integrate Visitors Centre with new Café and Special Events Centre on 1st floor of new facility. |

4. DEVELOP TOURISM ORIENTED HIGHWAY/STREET SIGNAGE

| Details | Key Tasks |
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| <p>Workshop participants identified highway and street signage as an important issue to be addressed. It was felt that more signing was needed to direct visitors as well as residents to area attractions, shopping, the downtown and the waterfront. Problems in finding suitable sign locations on the Queen Elizabeth Way were identified.</p> <p>It was recognized that signing needed to be visible, distinctive and eye-catching. Signage could include highway directional and internal street trail-blazing signs as well as banners.</p> <p>The new tourism brand could be used to provide instant recognition and a “corporate” look to the signing system.</p> | <p>Resolve signage issues. Develop a tourism signage plan.</p> <p>Tourism Burlington and City of Burlington to work with the Ontario Ministry of Transportation, the Ontario Tourism Oriented Directional Signage (TODS) organization, the Halton TODS section of the Halton Region Engineering Department, and the affected City departments to resolve signage technical /planning issues and develop a tourism signage plan for the City of Burlington.</p> |

5. ENHANCE LINKAGES AMONG THE CITY’S TOURISM EXPERIENCES

| Details | Key Tasks |
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| <p>Burlington has a unique variety of attractions such as Royal Botanical Gardens and the Burlington Art Centre, galleries, shops, parks and the waterfront.</p> | <p>Incorporate city experience linkage concept into marketing plans.</p> <p>Tourism Burlington to incorporate the city</p> |

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| <p>The marketing objective should be to link the attractions and connect the experiences so that visitors can easily find their way to them. This would encourage visitors to visit each part of the City, stay longer and thereby increase per capita expenditures. The emphasis would be on high quality experiences and four season activities allowing each part of the City to benefit.</p> | <p>experience linkage concept into its planning for Leisure Packaging, the Visitors Guide, highway and street signing and other promotional venues. Tourism Burlington to work closely with Team Burlington on this action.</p> |
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6. STRATEGICALLY ENHANCE SPORTING EVENTS TOURISM ACTIVITY

| Details | Key Tasks |
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| <p>The workshops identified the need to enhance the tourism experience originating with sporting events being held in the City. Workshop participants recognized that sporting events such as races and tournaments occurred year-round and attracted a significant number of visitors as well as participants. These visitors stayed at area accommodations and patronized local restaurants and shopping outlets.</p> <p>It is important to attract sporting events and adopt a strategy of going after the mature sporting event market that does not put an undue demand on existing sports and recreational facilities. Examples include foot and bicycle races, and sailing regattas. Promotional initiatives include preparing presentation kits, CD and video presentations, direct mail promotion, bid presentations, sales calls, hosting receptions and events to attract sporting groups, and brochures.</p> <p>It is important that there is a support base to offer help and assistance for groups which are hosting events in the City. There should also be a focus on supporting bids in neighbouring communities, ongoing research, and</p> | <p>Tourism Burlington to complete the application process for Trillium funding and implement the sporting event marketing initiative.</p> |

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| enhancing existing events. Tourism Burlington has applied to the Ontario Trillium Foundation for \$75,000 to offset the cost of this Sporting Event marketing initiative. | |
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7. ESTABLISH TOURISM BASED PERFORMANCE MEASURES AND IMPLEMENT ENHANCED VISITOR INFORMATION TRACKING SYSTEM

| Details | Key Tasks |
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| <p>Similar to other strategic performance measures adopted by City Council, specific tourism measures should be developed and report on annually.</p> | <p>Undertake research to identify performance measures and performance indicators for tourism, ensuring that performance measures are aligned with key strategic directions to achieve the tourism vision.</p> |

8. REPOSITION EXISTING AND DEVELOP NEW FESTIVALS AS A DISTINCT TOURISM ATTRACTION CENTERED ON MUSIC THEME

| Details | Key Tasks |
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| <p>Burlington has rich local cultural celebrations focused on music which could easily be repositioned as a major tourist attraction. Burlington hosts a very successful annual Sound of Music event for four days in mid-June. Sound of Music currently attracts between 100,000 and 150,000 over the four-day period. Workshop participants identified problems with access, parking and crowding during the event.</p> <p>Suggestions were made that the Sound of Music could be expanded to take in an entire week for a total nine or ten day period. A tremendous amount of planning, set up and take down goes into a four day event. It could include different music segments, a fireworks display with a music theme such as Symphony of Fire, a “battle of the bands” concept, children’s symphony, and an expansion of the Sound of Music parade.</p> <p>The feasibility of expanding the event to ten days could be undertaken. Issues such as potential market, access, parking, venues, management, financial feasibility, sources of funding and sponsorship would have to be addressed. Consideration should also be given to commencing the</p> | <p>Feasibility study to determine feasibility of expanding Sound of Music Festival to 10 days.</p> <p>The Sound of Music Board of Directors could work with Tourism Burlington and the City of Burlington’s Recreation Department to consider the feasibility of expanding the Sound of Music Festival to ten days. All types of music would be highlighted. Comprehensive and integrated marketing signage would be needed with pedestrian access in key locations.</p> <p>Tourism Burlington could include the Sound of Music in its Leisure Packaging initiative.</p> |

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| <p>event on the last weekend in June through the first week end in July, thereby including Canada Day celebrations. Additional venues throughout the City would be added In the short term, the Sound of Music could be marketed as a packaged event and be part of the Leisure Package initiative.</p> | |
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9. PROMOTE THE DOWNTOWN EXPERIENCE

| Details | Key Tasks |
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| <p>The downtown core with its historic building and architecture, boutiques, galleries, and fine dining has a distinct identity. It is adjacent to the waterfront with its walking and bicycle trails, Spencer Smith Park and Beachway Park. The renewal of the Burlington Art Centre, along with the recently announced \$20.3 million waterfront development project will have a direct, positive impact on Burlington’s downtown core. Tourism Burlington already features the downtown in its current Visitor Guide. There is an insert downtown core map along with the city map, and downtown attractions, restaurants, galleries, and accommodations are featured. Other initiatives such as signage and special events need to be coordinated to enhance the awareness of and draw to the downtown.</p> | <p>Improve promotion of downtown area. Tourism Burlington to work with Team Burlington to improve promotion of the downtown to visitors. The signage and leisure planning initiatives would help increase the promotion of the downtown area.</p> |

10. INVOLVE COMMUNITY PARTNERS IN THE TOURISM DEVELOPMENT

| Details | Key Tasks |
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| <p>Tourism is important to the economic health of the City of Burlington. Tourism visitation and expenditures mean employment and income generated, and investment created in the community. A recent economic impact study indicated</p> | <p>Implement target market initiatives – newsletter, public presentations, photo bank, media relations, member receptions, Tourism Awareness Week. Tourism Burlington has identified tourism industry and community leaders as an</p> |

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| <p>some \$50 million dollars of direct annual visitor expenditures; this would directly support over 1,000 full-time equivalent jobs making tourism a major employer. The community benefits as a result. It is important that local residents and business owners be active partners in tourism, and become effective ambassadors for the City. Tourism Burlington, the City of Burlington and the local tourism industry have all recognized the importance of having a solid commitment from Burlington residents to tourism's continued growth and development. This support appears to have grown significantly over the past two to three years. As a result, Team Burlington now sees tourism as an integral component of economic development. The series of workshops in August and again in November 2002, in which the public was invited to participate, along with the community survey, all are a recognition of the importance of public input into the tourism visioning and planning process. We would recommend ongoing consultation.</p> | <p>important target market in its current marketing plan. This list of stakeholders should be utilized for future tourism initiatives. We recommend continued development of initiatives such as the newsletter, public presentations to community groups such as service clubs, enhancing the photo bank, local and area media relations, hosting member receptions, and promoting Tourism Awareness Week in May.</p> |
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11. PROMOTE OUTDOOR TOURISM IN NATURAL AREAS

| Details | Key Tasks |
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| <p>Outdoor tourism activity also has significant potential for Burlington because of several natural attributes. The city has an abundance of resources, including green space in its northern areas, the waterfront, Royal Botanical Gardens, the Bruce Trail, Mount Nemo, bicycle and walking trails. These could be packaged as part of the Leisure Packaging initiative and cross-marketed with area accommodations including B & B's, restaurants, attractions, and services such as bicycle rentals. Tourism Burlington could work with the</p> | <p>Implement City trails map. Conduct further research to help package outdoor tourism opportunities. A market study identifying target groups, demographics and geographic targets for Burlington's specific product offerings would be helpful.</p> |

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| <p>Bruce Trail Association, the Royal Botanical Gardens, Conservation Halton and area tourism industry partners to come up with an area trails map.</p> | |
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LONG TERM STRATEGIES

12. IMPLEMENT DOWNTOWN WATERFRONT DEVELOPMENT PLAN

| Details | Key Tasks |
|---|---|
| <p>Burlington is poised to undertake an exciting, new development over the next three years that will have a major impact on tourism for the city. The recently announced Waterfront Development project could fulfil the desire for a “Wow!” attraction as expressed during the community workshops. It will also create a catalyst for further private sector development, particularly in the downtown and waterfront areas.</p> <p>The \$20.3 million project, announced in March 2002, includes components that are currently in the planning and public input stage.</p> <ul style="list-style-type: none"> ◆ A signature building at the former Brant Inn site as a unique gathering place ◆ An outdoor water feature that can be transformed into an ice rink in winter ◆ Open pier for viewing ◆ Transient marina ◆ Year round performance plaza ◆ Enhanced waterfront trail connections <p>Already underway or completed, are the following:</p> <ul style="list-style-type: none"> ◆ Renewal of the Burlington Art Centre with enlarged program and conference spaces, exhibition galleries, new café and eating facilities, barrier-free access, and visitor information kiosks. ◆ Locust Street parking garage and office complex to house Team Burlington which includes the Burlington Chamber of Commerce, Burlington Economic Development Corporation, Tourism Burlington, Burlington Downtown BIA and the Visitor Information Centre. | <p>Provide input during planning stage to ensure economic development potential is maximized.</p> |

City of Burlington Tourism Vision

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APPENDIX I

BURLINGTON RESIDENTS SURVEY RESULTS SUMMARY

KEY FINDINGS FROM SURVEY OF BURLINGTON RESIDENTS

A component of this study was to gather the views of community residents on the direction they would like to see the City take on guiding the development of tourism. To this end, a survey of Burlington residents was completed in the fall of 2002. The survey had a number of objectives that included the following:

- To ascertain direct opinions from Burlington residents on their vision of tourism in Burlington
- To gain advice from Burlington residents on a range of issues that will assist in defining the Tourism Vision
- To gain input to the direction for tourism programming from the perspective of the public
- To compare opinions arising from different interests.

The results indicate that residents are willing to maintain support for tourism with a strong percentage of respondents seeing the need to expand support.

- Waterfront and downtown development is highly supported as a means of improving tourism. This is followed by further expanding natural areas.
- There was little difference in support for developing tourism activities between respondents living north of the QEW, south of QEW and along the waterfront.

- There were similar responses from respondents living north of the QEW, south of the QEW and along the waterfront for increasing financial support and maintaining existing levels of financial support for tourism development
- Responses by age group to the amount of financial support the City of Burlington should contribute to tourism, were also similar with approximately half of respondents in all age groups indicating that the City of Burlington should increase financial support
- Respondents living north and south of the QEW and along the waterfront also responded similarly as to whether the City of Burlington should maintain existing levels of tourism activity, enhance tourism through existing activities or introduce major new tourism activities.

HIGHLIGHTS OF SURVEY RESULTS

Previous Tourism Experiences

The types of travel experiences that survey participants have shapes their views of tourism activity at home. To get an idea of the types of tourist experiences that participants previously participated in, respondents were asked where they had travelled to in the past two years and what types of activities they did. The overwhelming majority had taken an overnight trip outside of Burlington and had taken an overnight trip within Ontario. Approximately 73% had also taken in an event or attraction within Burlington. Results indicate that more participants took a trip to the U.S. (53%) as compared to a trip to another Canadian province (42%). Moreover, 35% took an overseas trip.

When probed to identify the types of activities they participated in during business or leisure trips outside of Burlington, respondents indicated that shopping was their most popular activity. This is reflective of the national response and is the #1 reason for tourist activities across Canada. This was followed by visiting an attraction such as a heritage site or natural wonder, wineries, or fine dining establishment.

Participation in Tourism Activities, Events and Attractions in Burlington

There are a number of different facets to tourism that people may not perceive as being a part of the tourism industry. Events such as conventions or seminars and competitive sporting games and tournaments may not typically be at the top-of-mind when residents consider the extent of tourism in the community. Additionally, residents may not consider themselves to be a tourist in their own town. To address the diverse types of tourist activities in Burlington, survey participants were asked the frequency with which they attended a number of tourism activities, events or attractions in Burlington.

Results indicate that 23% of participants attend major festivals and approximately 14% visit a Burlington art gallery, museum or heritage site at least once per year.

- About 28% attend festivals, 22% visit natural areas two to three times per year, and 16% participate in outdoor recreational activities .
- The top three activities, events or attractions that respondents indicated attending four or more times per year were as follows: outdoor recreational activity (49%), waterfront activity (35%) and fine dining experience (33%).

When family or friends are visiting, findings indicate that respondents were most likely to take them out for a Burlington fine dining experience, attend waterfront activities or a major festival. This is also similar to the types of activities or events they would attend themselves as tourists. The top five most popular activities, events or attractions that respondents take their friends and family on when visiting are as follows:

- Fine dining experience 55%
- Waterfront activities 54%
- Major festival 51%
- Natural area 48%

- Botanical garden 44%

Burlington's Future Tourism Image

To gain an understanding of the types of activities, events or attractions that residents would like to see more of in Burlington, respondents were asked to indicate their top three choices. Findings show that survey participants would like to see more of the following activities and attractions: festivals (21%), natural areas (20%), zoos, planetariums or science parks (18%), events such as operas, symphonies or ballets (17%), attractions such as heritage sites or natural wonders (15%)

There are a number of different images that a city can portray to its residents and visitors. To gain insight into the tourism image that best represents Burlington, respondents were asked to identify their top three choices as to the type of city that Burlington should be known for. The majority of respondents would like Burlington to be known for its waterfront (85%). This is followed by 47% for a unique and attractive downtown and 46% of respondents supporting the image of city known for natural areas.

Further to the concept of an image for the city, survey participants were asked to identify what areas and activities related to Burlington tourism could be expanded or enhanced. The greatest support was for the expansion of waterfront development (79%). This was followed by unique shopping and dining experiences (50%), outdoor recreational opportunities (49%), festivals and events (47%) and arts, culture and the performing arts (32%) to complete the top five responses.

Direction to City of Burlington: Level of Effort and Financial Support for Tourism

To understand the level of support for tourism in Burlington, survey participants were asked to indicate the type of assistance they are interested in having the City of Burlington provide. Specifically, respondents were asked to determine their support for the City being responsible for maintaining existing levels of activities, events and attractions, enhancing these features or introducing new activities, events and attractions to the City.

Results indicate that the majority of respondents were interested in enhancing existing tourism features (39%) and introducing major new activities (33%).

Another key issue was the willingness to support additional expenditures from the tax base to provide funding for tourism. Results indicate that 46% of respondents supported an increase to existing financial support, 45% supported maintaining existing levels and 2% wanted to reduce existing support.

APPENDIX II

TOURISM VISION WORKSHOP SUMMARY

OVERVIEW OF THE TOURISM VISION WORKSHOP

On November 14th 2002, over 70 Burlington residents, stakeholders and staff came together to craft a tourism vision for Burlington. The Workshop involved speakers and an extensive examination of core issues involving large group facilitation techniques.

Speakers shared information on global tourism trends and the preliminary results of the resident survey (see Appendix I). Participants also heard of the success of other municipalities. However, they were encouraged to identify a made-in-Burlington solution.

Workshop participants were asked to sift through a range of ideas for future tourism development. The ideas deemed to be too good to ignore were called 'keepers'.

While the flip chart notes provide considerable detail on the issues discussed and conclusions drawn by participants, several key themes are apparent:

First, Burlington is prepared to support a signature or hallmark event or attraction that enhances its profile. Second, the quality of life of Burlington residents is high. And, tourism investment both supports the quality of life and makes Burlington attractive to visitors. Signage and visibility is important. And, a 'tourism' brand needs to be developed. Third, the waterfront, downtown and natural areas should be seen as core elements of the tourism product. Finally, 'quality' means both maintaining Burlington's safe, clean and friendly image,

while building upon the current success with events, festivals and attractions.



City of Burlington Tourism Vision
