



County of Frontenac Accommodation Review and Strategy for Growth

July 2017



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1. Introduction

1.1 Report Contents

Frontenac County, in cooperation with its four member municipalities, has contracted MDB Insight to conduct a review and study of accommodations and provision of a strategy to grow the range of accommodation opportunities available in Frontenac.

The report contains the following sections that outline support the development of this strategy.

- Existing and expected visitor profiles.
- Existing profiled accommodations and tourism assets throughout the Frontenac region.
- Assessing existing land uses that provide for accommodation development.
- Reviewing planning and policy implications surrounding accommodation development within each municipality.
- Synthesizing results from targeted and open community consultation, including conversations with existing accommodators and tourism operators, Brand Ambassadors, investors and influencers.
- Identifying opportunities for development of accommodations throughout the Frontenac region.
- Reviewing case studies that present lessons learned for Frontenac County and its member municipalities.
- A strategy for growth in accommodations across the Frontenac region.

1.2 Notes on Data

Data was collected from a variety of sources, including the County and its member municipalities' business directories, web searches, Highlands Tourism Organization, and the Great Waterway Tourism Organization.

The County provided relevant assessment data. The assessment data was used to further refine the existing inventory of accommodation providers (e.g. bed and breakfasts, hotels, motels, campgrounds), as well as to identify underutilized properties or buildings that could be re-purposed for accommodation (e.g. secondary on-farm structures, upper storey residential units, seasonal dwellings).



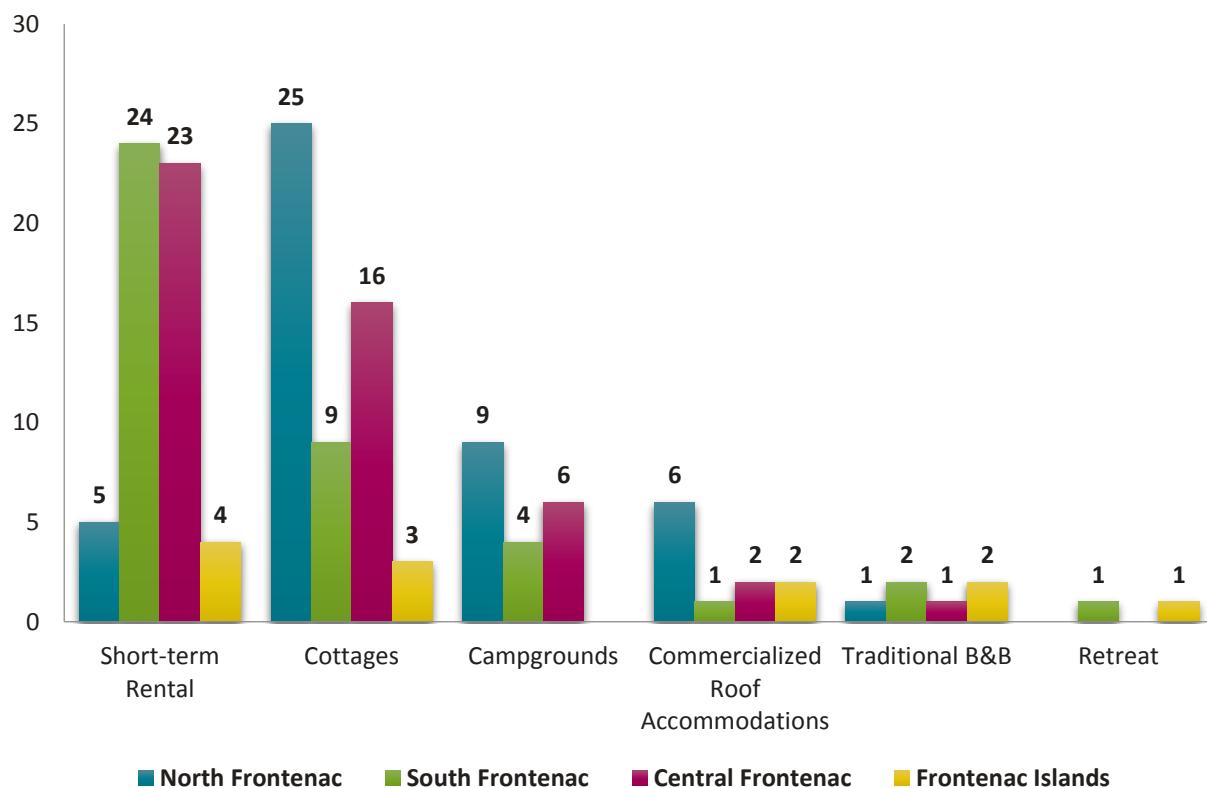
2. Current Context

2.1 Accommodation and Tourism Asset Overview

2.1.1 Accommodation Assets Identified Through Business Directories

Accommodation assets, with a form of marketing presence, throughout the Frontenac region have been identified via business directories or public knowledge and are represented by member municipality in Figure 1. In total, the Frontenac region has 145 profiled accommodations, of which, approximately 33% are located in Central Frontenac, 31% in North Frontenac, 28% in South Frontenac and 8% in the Frontenac Islands. The accommodations range from short term rentals (STR) to cottages, campgrounds and commercialized roof accommodations that include hotels, motel and inns. Short term rentals make up the largest categories of accommodation (38%) across the region, followed by cottages (36%) and campgrounds (13%). On examining the individual municipalities, South Frontenac has the largest percentage of STR, 43%, followed by Central Frontenac with 41%, North Frontenac with 9% and Frontenac Islands with 7%. North Frontenac has the highest number of cottages; 47% of total cottage accommodations in the county. Although, Frontenac islands do not have any campgrounds, it has two commercialized roof accommodations, two traditional Bed and Breakfasts (B&B's) accommodations and one retreat center. South Frontenac has the only other listed retreat center in the region.

Figure 1: Accommodation Assets Identified Via Business Directories in Frontenac County, 2017



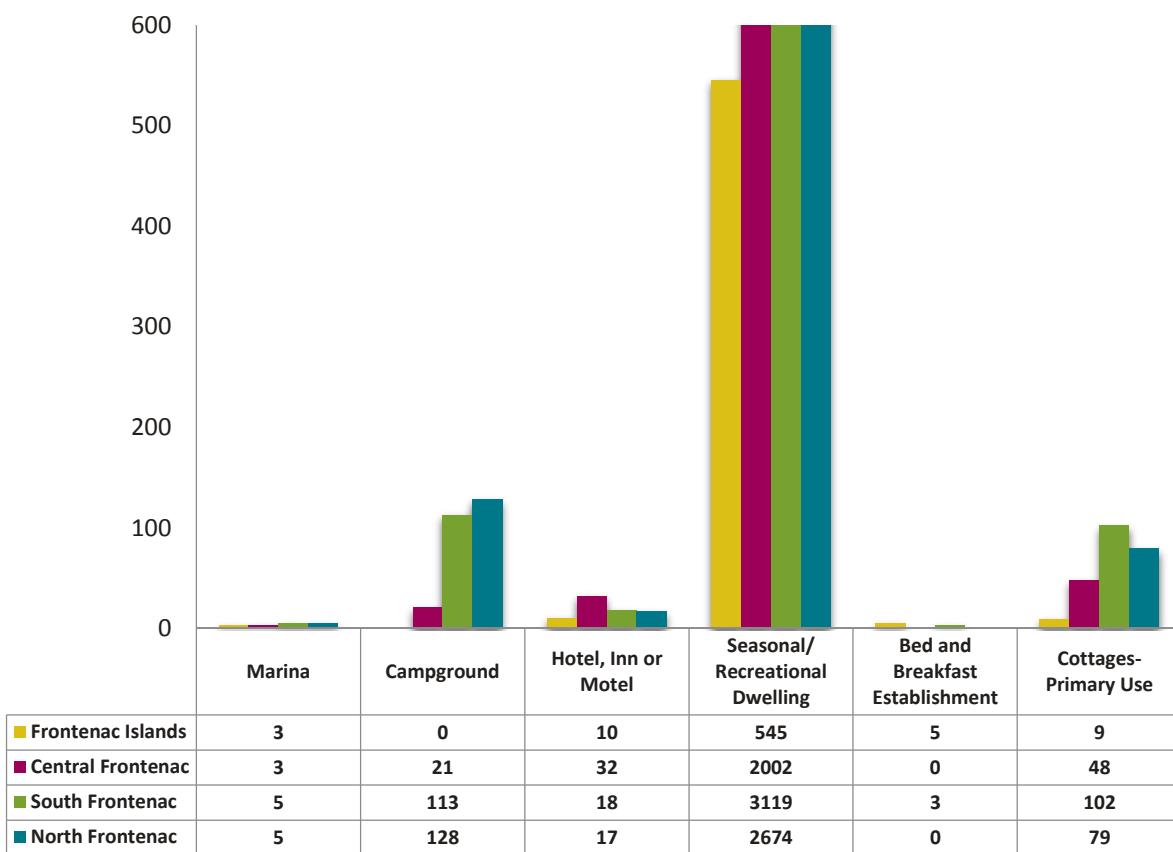


2.1.2 Accommodation Assets By Designated Property Use

The 2017 accommodation assessment data for the Frontenac region is shown in Figure 2. The figure illustrates the type and number of accommodations present in the each municipality through designated property codes. It can be observed that seasonal/recreational dwellings are high in all four municipalities. The seasonal/recreational dwellings include those located on water and not located on water. The assessment data also shows that campgrounds and house-keeping cottages are relatively abundant throughout the region.

When comparing the data obtained through business directories to the assessment data, many discrepancies are observed. For example, Figure 2 shows that the total number of seasonal/recreational dwellings (homes that are not occupied by full time residents) in South Frontenac is 3,119 followed by Central Frontenac with 2,002, North Frontenac with 2,674 and Frontenac Islands with 545 dwellings. However, Figure 1 shows only 145 accommodations overall. Furthermore, the business directories show only 37 cottages and 17 campgrounds in the region whereas the assessment data indicates 238 cottages and 262 campgrounds. The discrepancy highlights that there are many potential accommodation assets throughout Frontenac County, particularly seasonal and recreational dwellings that have capability to impact the tourism industry. Maintaining an accurate business directory is an essential first step to ensuring that travellers to the region have access to current and relevant information.

Figure 2: Accommodation Assessment Data, 2017



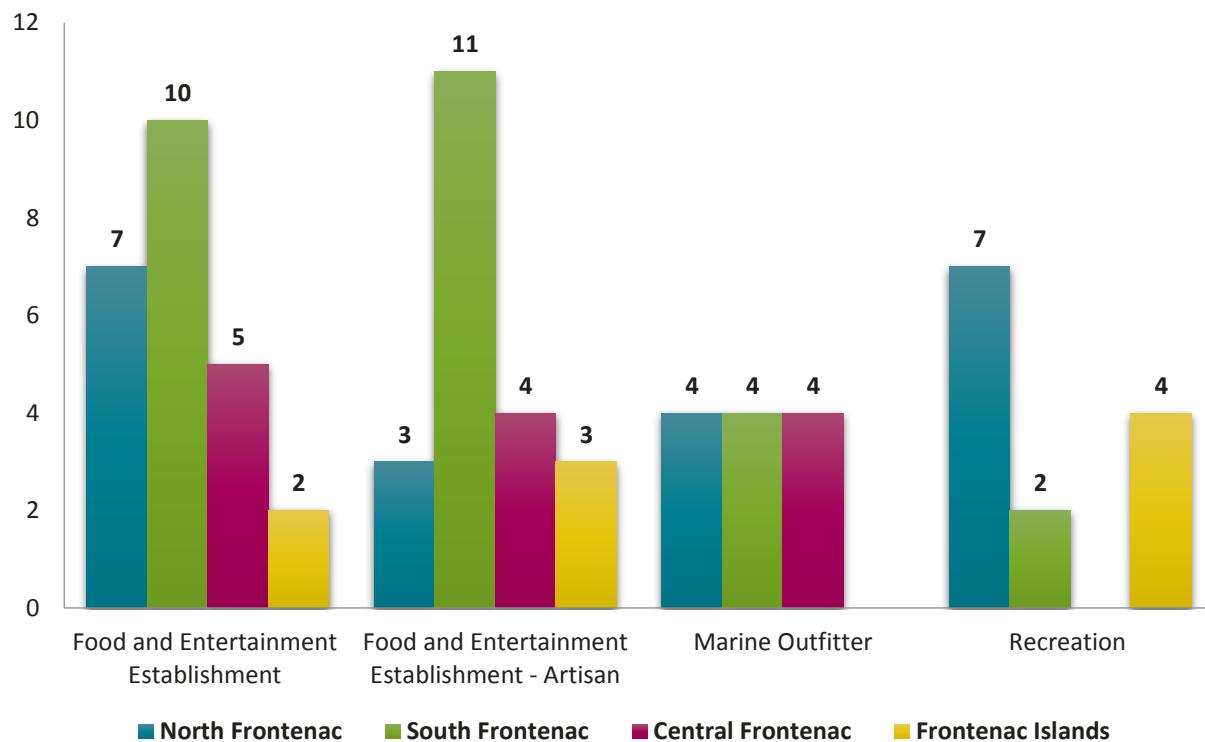


2.1.3 Tourism Related Assets Identified Through Business Directories

Tourism Related Businesses

Tourism related businesses are important supporters of the tourism industry and as such, quantifying them will enable the development of a more informed strategy for growth. Figure 3 shows the tourism related businesses identified via business directories in Frontenac County in 2017. There are a total of 70 tourism related businesses, profiled and marketed, in the region. 34% of the listed businesses are Food and Entertainment Establishments and 30% is artisan Food and Entertainment Establishments. South Frontenac represents 39% of total businesses in the county. The business directories show no recreation areas in South and Central Frontenac; this indicates a possible gap in listed businesses.

Figure 3: Tourism Related Businesses Identified Via Business Directories in Frontenac County, 2017

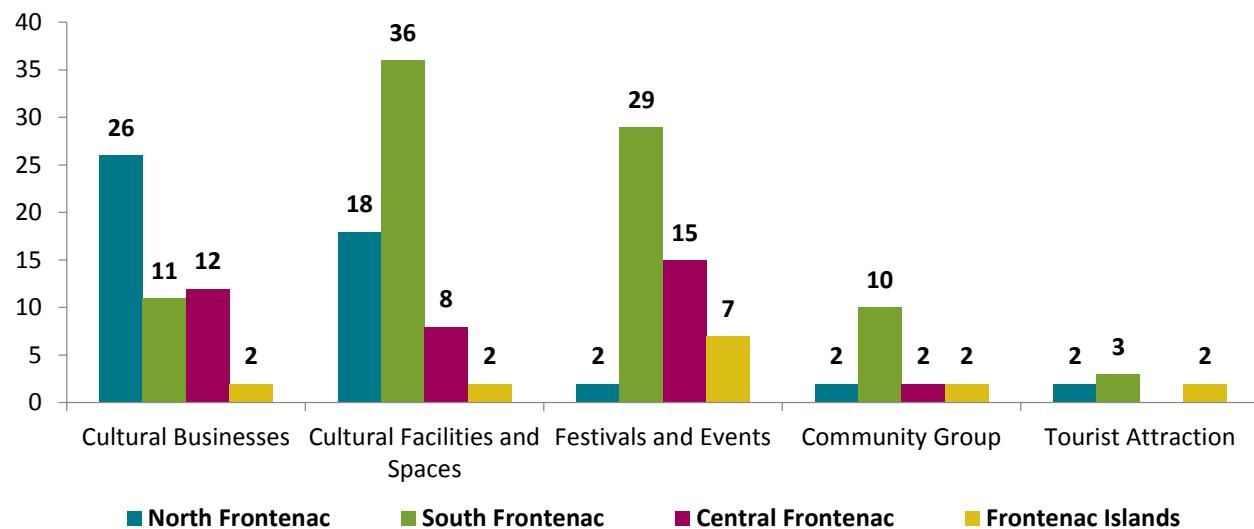


Cultural Assets

In addition to the general tourism related businesses, there are 191 cultural assets throughout Frontenac (Figure 4). These assets include tourist attractions (e.g. Silent Valley Alpaca, 30 Acre Ranch), community groups (e.g. North Frontenac Little Theatre Company, Wolfe Island Network for Healthy Community) and cultural businesses (e.g. Gallery on the Bay, Free Spirit Gallery). These cultural assets help to attract visitors and provide recreational opportunities. To this end, they are critical assets in supporting the overall tourism sector in Frontenac.



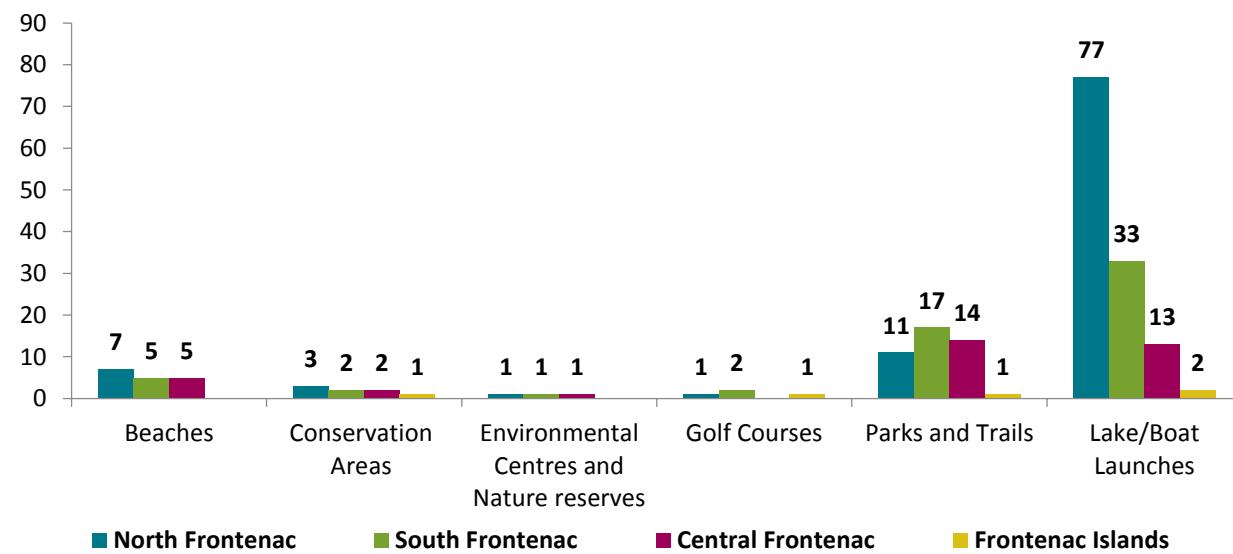
Figure 4: Cultural Assets Identified Via Business Directories in Frontenac County, 2017



Natural Assets

The natural setting and environmental assets of Frontenac also act as key attractors for tourists. There are 200 natural assets in the region, 50% of which are located in North Frontenac Township. There are 125 lakes and boat launches (63% of all total natural assets). Parks and trails are found throughout the Frontenac region and account for 22% of total natural assets. Beaches are the third largest category as they make up 9% of total natural assets, followed by Conservation Areas (4%). This suggests that waterfront and lakefront tourism assets play a significant role in supporting the tourism industry throughout the area and particularly in North Frontenac. Figure 5 does not include assets like the Rideau Trail, and the Frontenac K&P Trail, as they snake through multiple townships.

Figure 5: Natural Assets Identified Via Business Directories in Frontenac County, 2017





2.2 Policy and Planning Implications for Accommodation Uses

A key consideration in trying to support the creation of new accommodation options is the permissiveness of the current land use policy framework and the degree to which the county and its member municipalities are supporting the development of tourism accommodation. To determine this, a high-level review of the current Official Plans and Community Improvement Plans (CIPs) was completed. The information that follows is not exhaustive but rather intended to reflect the current policy position of the various municipalities as it relates to providing for a select range of alternative accommodation uses.

2.2.1 Official Plan and Land Use Policies

The Official Plans of Frontenac County and its member municipalities, recognize the importance of tourism to the economy. Tourism related goals in the Official Plans include supporting tourism by working to develop a regional trail network to encourage recreational opportunities and tourist related project throughout the region, which benefit local communities and the local economy.

In examining the Official Plans of the County and the four member municipalities, key promoted tourist accommodations include bed and breakfasts, hotels/motels and campgrounds. Frontenac County's Official Plan also highlights opportunities for on-farm activities and agri-tourism, all of which could be interpreted to mean support for bed and breakfasts and on-farm accommodations throughout the Frontenac region. The following table highlights the key accommodation related policies found in the Official Plans.

Figure 6: Official Plan Policy Implications for Accommodation Development

Frontenac County
<p>Section 2.0 – Support Economic Sustainability Across the Region</p> <ul style="list-style-type: none">▪ This includes, but is not limited to, the development of golf courses, resorts, campgrounds, trailer parks, marinas, tourist accommodation facilities, museums, historical and scenic tours and heritage sites as elements of a successful tourism economy. The maintenance and use of lakes and rivers in Frontenac also play a significant role in providing opportunities for tourism and leisure activities. <p>To succeed, Frontenac County will need to work with its member municipalities, the Province, Frontenac Community Futures Development Corporation, City of Kingston, and various tourism agencies and organizations to promote tourism activity.</p>
<p>Section 3.3 - Rural Lands Provide Tourism Opportunities</p> <ul style="list-style-type: none">▪ This includes the promotion of the tourism economy across the Frontenac region by ensuring suitable lands are available to satisfy demands for tourism and tourism related development. To encourage economic diversification in rural lands is to include a greater flexibility for on-farm activities, home-based businesses and agri-tourism, and new small scale industrial-type ventures that are connected to the farm economy such as milk processing, cheese factories and craft breweries.



Special Policies – Rural Waterfront Areas	
<ul style="list-style-type: none">▪ To permit shore land development that allows for sustainable growth of existing and new tourist developments and innovative and appropriately designed new residential developments.	
Section 4.1 Trail Development and Scenic Routes as a Priority	
<ul style="list-style-type: none">▪ Frontenac County's location and scenic assets provide ample opportunities for creating scenic or heritage routes. These routes draw both local residents and tourists to the scenic areas of the County. Cycle tourism can benefit the economy of businesses across the Frontenac region.	

Central Frontenac
Section 3.5.1 Residential Districts Allow For Tourism Related Commercial Uses
<ul style="list-style-type: none">▪ Commercial uses such as convenience stores which serve the day-to-day needs of residents or uses which cater to the tourist industry (e.g. antique store, craft shop, restaurant, bed and breakfast and professional offices through the conversion of residential dwellings). In Hamlets or Cross Road communities, commercial uses may also include small-scale retail outlets and personal service uses.
Section 3.6.2 Rural Area – Residential Units in Rural Areas Allow For Accommodations As An Accessory Use
<ul style="list-style-type: none">▪ Accessory uses may include a home based business, a bed and breakfast establishment and a garden suite.
Section 3.6.3 Rural Area -Waterfront Units in Rural Areas Permit The Use Of Seasonal and Permanent Accommodation Uses
<ul style="list-style-type: none">▪ Permitted uses within the Waterfront District Designation include seasonal and permanent residential and recreational commercial uses such as campgrounds, recreational vehicle parks, marinas, tourist lodges, golf courses and restaurants.
Section 3.8 Rural Area – Accommodation Based Development Is Permitted In Areas Zoned Recreational Commercial Use
<ul style="list-style-type: none">▪ In areas designated Rural on Schedules 'A1 - A4', the Land Use Plan permits recreational commercial uses that can include uses and services which meet the needs of rural residents or which are oriented to the vacationing public or which are leisure or recreation oriented (such as campgrounds, lodging, marinas, golf courses, outdoor recreation, automotive uses, eateries).



Frontenac Islands

Section 4.10 Bed and Breakfast Operations Permitted In Certain Areas

- Bed and Breakfast operations can be permitted in certain areas as established in the implementing Zoning By-law. Such establishments must be operated by one or more permanent residents of the dwelling house. A maximum of three guest rooms may be used for overnight accommodation of the travelling public.

Section 5.2 Rural Designated Lands Allow For Tourism and Accommodation Related Uses

- The predominant use of land within the Rural designation may include all agricultural uses outlined in Section 5.1 of this Plan, forestry, "Wind Farms", reforestation, conservation, community facilities, home occupations and professional offices in residences and accessory buildings, outdoor recreational facilities such as golf courses, hiking and cross-country ski trails which require a large land area, bed and breakfast establishments and similar, small-scale accommodation which caters to tourists and travellers and is compatible with the rural character of the area.

Section 5.2.4.2 Shoreline Residential Uses Permit Accessory Uses for Accommodation Development

- Resort commercial uses which provide lodging and accommodation for the vacationing public such as motels, lodges, cottage establishments and cabins, and bed and breakfast operations, with accessory residential uses for the owner and recreational uses such as tennis courts, swimming pools and golf courses. Resort institutional uses which provide camping and resort type accommodation for religious and private non-profit organizations are also permitted.

Section 5.2.4.4 Tent, Trailer and Recreational Vehicle Parks Are Limited to Seasonal Operations and Size

- The uses permitted for tent, trailer and recreational vehicle parks are limited to seasonally operated schedules along with any accessory facilities such as docks and convenience stores catering to the day-to-day needs of tourists. Tent, trailer and recreational vehicle park shall be large enough to support the proposed number of campsites, accessory uses and open space areas but shall be not less than 4 ha. [9.88 ac.] in area

Section 5.5 Village Land Use Policies Allow For Bed and Breakfast Establishments

- The predominant form of land use will be single detached dwellings. Other residential permitted uses will include; a full range of low and medium housing types, multiple unit residential development; apartments-in-a-house; apartment units associated with a retail commercial use; bed and breakfast establishments; and senior citizen's housing.



North Frontenac

Section 4.6 Rural Recreational and Conservation Uses Allow For Camp-Cabin Type Accommodations

- A camp (recreational based camp) may be permitted under a land use permit with the Crown or as a remote use on private land, provided that appropriate arrangements are made for on-site servicing. The requirements for frontage on a road may be waived.

Section 4.7 Rural Commercial Uses Are Geared Towards Tourism and Accommodation Development

- Commercial uses shall include a range of commercial facilities that principally serve the tourist trade, such as lodging facilities, motels and resorts, recreation facilities, golf courses, parks and facilities related to boat traffic, such as marinas, docks and other services. Buildings or other items of historic interest, and institutional uses (such as museums and related facilities), shall also be permitted. However, limitations exist for tenured housing that is oriented to short-term or seasonal occupancy (i.e. condominiums, fractional ownership, and timesharing facilities).

Section 4.8 Recreational Vehicles And Recreational Vehicle Parks And Campgrounds Are Limited To Seasonal Commercial Operations But Can Provide Short-Term Occupancy During The Winter Months For Select Days

- It is expected that these parks would be operated on a seasonal basis, e.g., May - October and closed during the winter months. The Plan allows for the over wintering or storage of recreational vehicles in these parks. Recreational Vehicle Parks shall for the purposes of this Plan, be understood to include a campground for tents. Notwithstanding the provisions of this clause, short-term occupancy of recreational vehicles during the period November will be permitted. Short-term occupancy may pertain, but is not limited to, weekends, Christmas and New Year's holidays and school breaks. Short-term occupancy during this period shall not exceed 10 days per calendar month.

South Frontenac

Section 5.6.1 Residential Policies Allow For Bed and Breakfast Related Uses

- The uses permitted shall include single detached dwellings; semi-detached or duplex dwellings, multiple unit dwellings, single detached dwellings converted to multiple unit dwellings; group homes established in accordance with the provisions of Section 6.5, bed and breakfasts and home occupations.

Section 5.6.3 Commercial Policies Allow For Roofed Accommodation Uses

- The uses permitted include those commercial establishments offering goods and services which serve the residents of the Settlement Areas or the market area as a whole such as retail commercial establishments, personal service shops, recreational uses, motels and hotels, tourist homes, and other.



South Frontenac

Section 5.7 Rural Designated Land Policies Limit Accommodation Development

- The predominant use of land in the Rural designation shall be for agricultural; aquaculture; open space; conservation; limited service residential; recreational; community facility and rurally oriented non-farm residential; group homes established in accordance with the provisions of Section 6.5; commercial and industrial and bed and breakfast and home occupation uses.
- Recreational and resort commercial uses shall include tent and trailer parks; resorts, including privately managed lodges; health spas; tourist accommodations such as cabins, motels and hotels; marinas. Bed and breakfast operations are not considered recreational and resort commercial uses but as a home occupation in accordance with the provision of the implementing zoning by-law.
- Highway commercial uses shall include; motels; hotels; taverns; restaurants; convenience retail stores and similar uses. Tent and trailer parks shall include seasonally operated parks for tents and recreational vehicles, not including mobile homes together with accessory facilities such as an accessory dwelling, docks, and convenience stores catering to the day-to-day needs of the visitors. The minimum lot area for tent and trailer parks shall be 4 ha (10 acres); the maximum number of campsites should be 50 in order to avoid excessive concentrations of development in waterfront areas.
- No campsite, building or structure except a marine facility for launching and/or servicing of boats or a water pumphouse is permitted within 50 metres (164 feet) of the high water mark of any water body.
- Motels, hotels, rental cabins or other roofed accommodation, including accessory facilities such as docks, eating establishments, and convenience stores shall have a minimum lot area of 2 ha (5 acres). The maximum density shall be one unit per 2,000 m² (½ acre) to a maximum of 50 units, provided the appropriate authority will approve of the sewage disposal systems which are used.

Source: Frontenac County, Jan. 2016; Township of Central Frontenac, June 2008; Township of Frontenac Islands, Oct. 2011; Township of North Frontenac, 2017; Township of South Frontenac, May 2013



2.2.2 Community Improvement Plans

The Community Improvement Plans of Frontenac County's member municipalities are similar in terms of programming, with slight differences in terms of funding availability in each. Among all the programs, the Community Improvement Loan Program, Commercial Space Conversion Program, Commercial Building Improvement Grant, and Business Start-up Funding Program available in the member municipalities stand out as important tools to leverage in supporting the creation of new accommodations (e.g. bed and breakfasts) in the region. The Façade Improvement Program stands out as an opportunity to support existing accommodations throughout the region. The following table highlights the CIP programs available in each member municipality.

Figure 7: Community Improvement Plan Policies for Frontenac's Four Member Municipalities

Program	North Frontenac CIP	Harrowsmith CIP South Frontenac	Marysville CIP Frontenac Islands	Sharbot Lake CIP Central Frontenac
Community Improvement Loan Program: Preferential financing for eligible projects, approved under the Grant Programs but excludes the Municipal Fees Grant Program.	Not Applicable	An interest free loan to a maximum of \$7,500 amortized over five years is available to assist property owners in addition to the grant programs.	An interest free loan to a maximum of \$7,500 amortized over five years is available to assist property owners in addition to the grant programs.	An interest free loan to a maximum of \$7,500 amortized over five years is available to assist property owners in addition to the grant programs.
Façade Improvement Program: Intended to improve the appearance of commercial and residential buildings in order to improve the overall aesthetics and character of the community.	A onetime grant of 50% to a maximum of eligible project costs in order to improve commercial building features. The maximum grant per property is \$2,500	A onetime grant of 50% to a maximum of \$2,000 for residential or \$3,500 for commercial of eligible project costs in order to improve exterior building features. Residential projects must front onto Road 38, Harrowsmith Road or Colebrook Road Commercial projects must be for properties zoned commercial.	A onetime grant of 50% to a maximum of \$3,000 of eligible project costs in order to improve commercial building features. A onetime grant of 50% to a maximum of \$1,000 of eligible project costs in order to undertake residential building improvements on Road 96 in the CIP area.	A onetime grant of 50% to a maximum of \$3,000 of eligible project costs in order to improve commercial building features



Program	North Frontenac CIP	Harrowsmith CIP South Frontenac	Marysville CIP Frontenac Islands	Sharbot Lake CIP Central Frontenac
Accessibility Enhancement: Encourage commercial property owners to retrofit entranceways and other access points to ensure facilities and commercial outlets are accessible to all members of the community.	A onetime grant of 50% to a maximum of eligible project costs in order to improve accessibility for commercial properties. The maximum grant per property of \$2,500	A onetime grant of 50% to a maximum of \$3,500 of eligible project costs for projects that improve the commercial building stock within the CIP area. The intent of this program is complement the Façade Improvement Program noted above but specifically tailored to businesses.	Not Applicable	A onetime grant of 50% to a maximum of \$2,500 of eligible project costs in order to improve accessibility for commercial properties
Municipal Fees Grant Program: Intended to reduce the costs of development and/or rehabilitation of existing buildings that contribute to the quality of the community.	A onetime grant equal to the total application costs or \$2,000, whichever is the lesser.	A onetime grant equal to the total application costs or \$2000, whichever is the lesser. Application fees must be for improvement projects for commercial or residential properties fronting onto Road 38, Harrowsmith Road or Colebrook Road	A onetime grant equal to the total application costs or \$2,000, whichever is the lesser. Application fees must be for improvement projects that qualify for other programs.	A onetime grant equal to the total application costs or \$2000, whichever is the lesser. Application fees must be for improvement projects that qualify for other programs.



Program	North Frontenac CIP	Harrowsmith CIP South Frontenac	Marysville CIP Frontenac Islands	Sharbot Lake CIP Central Frontenac
Commercial Space Conversion: Support new businesses looking to locate in the village core and also provides some funds to existing residential properties along Highway 96 for conversion into new businesses to increase the overall business activity within the village area.	A onetime grant of 50% to a maximum of eligible project costs for projects that increase commercial building stock within the CIP area. The maximum grant per property of \$2,500	Not Applicable	A onetime grant of 50% to a maximum of \$1,000 of eligible project costs for projects that increase commercial building stock within the CIP area.	Not Applicable
Other Community Specific Programs				
<ul style="list-style-type: none">South Frontenac Harrowsmith CIP- Commercial Building Improvement Grant: seeks to restore the existing building stock and relates to projects that are beyond basic Façade Improvement and are focused inside the commercial unit. A onetime grant of 50% to a maximum of \$3,500 of eligible project costs for projects that improve the commercial building stock within the CIP area. The intent of this program is complement the Façade Improvement Program noted above but specifically tailored to businesses.Frontenac Islands Marysville CIP- Seniors Housing Study Incentives: Funding is available to help promote the development of new affordable seniors housing in and around the village of Marysville including supportive housing for seniors, through the funding of background studies. This would be focused on new projects, rather than renovation of existing dwellings. However funding for conversions could also be considered on a case-by-case basis if the units are accessible. A onetime grant of 50% to a maximum of \$5,000 of eligible project costs for studies to support a new seniors housing development of 4 or more units in the CIP area.Central Frontenac Sharbot Lake CIP- Business Start-up Funding: Funding is available to help new businesses looking to locate in the village core or the Highway 7 corridor. Some existing residential properties along Road 38 may also be desirable for conversion into new businesses to increase the overall business activity within the village area and bridge the gaps between the Elizabeth Street and Highway 7/38 commercial areas. The program provides financial assistance for projects creating new commercial/employment opportunities within existing buildings or through additions. A onetime grant of 50% to a maximum of \$2,500 of eligible project costs for projects that increase commercial building stock within the CIP area.				

Source: Township of Central Frontenac, Sharbot Lake, Aug. 2012; Township of Frontenac Islands, Marysville, Oct. 2013; Township of North Frontenac, Mar. 2016, Township of South Frontenac, May 2013



2.3 Profile of Frontenac's Tourists

In order to understand the opportunities associated with providing additional and support existing accommodations in the Frontenac region, consideration must be given to the types of travellers who visit the Frontenac region and its member municipalities. The Frontenac region is split between two Regional Tourism Organizations (RTO). Central and North Frontenac are in RTO 11, Ontario's Highlands Tourism Organization. South Frontenac and the Frontenac Islands are in RTO 9, the Great Waterway Tourism Organization.

Visitor profiles have been developed for both regions – a project co-managed and commissioned by the Ministry of Tourism Culture and Sport and the Ontario Tourism Marketing Partnership Corporation. There are similarities and differences between the tourist profiles. The following table captures the most common tourist profile and preferred activities and accommodation choices that are associated with each.

Understanding what types of accommodations and activities desired by tourists is important to developing and supporting accommodations and the broader tourism sector in the region. Figure 8 shows that, overall, hotels and motels are the preferred accommodation choices for the tourists who visit the Frontenac region; only 'Nature Lovers' prefer campgrounds.

Figure 8: Profiles of Tourists who Visit the Frontenac Region

Segment	Definition	Accommodation Choices
Tourist Profiles for those visiting the Frontenac Region		
Nature Lovers	<p>Typically, this group is made up of families with children, with a passion for outdoor experiences. Travel is seen as an opportunity about exploring new places, off the beaten path.</p> <p>Typically they have a lower than average travel budget and are happy with the basics (i.e. camping), spending time with their families, and finding opportunities for family bonding and creating new family memories.</p> <p>Preferred activities include hiking, beaches, canoeing, parks and fishing.</p> <p>42% rely on family and friends for travel tips.</p> <p>78% use the internet to plan, including accommodation sites, online travel agencies and destination sites.</p>	<ul style="list-style-type: none">▪ 32% serviced campground/ trailer park▪ 26% hotels▪ 19% family/friends▪ 11% unserviced campgrounds



Segment	Definition	Accommodation Choices
Connected Explorers	<p>Typically, this group is under 40 years old, both with and without children. This group is characterized as a confident and youthful and are an optimistic group with a need to travel and to expose themselves to new experiences as well as expand their horizons.</p> <p>Typically they look for a fully packed schedule of activities, using the internet to research, book, plan and share their travel experiences.</p> <p>Preferred activities include visiting museums, galleries, shopping, parks, landmarks, culinary, spa and beaches.</p> <p>They like to do what the locals are doing (e.g. events, restaurants, attractions).</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">57% hotel/boutique hotel21% family/friends14% motel9% inn/bed and breakfast
Additional Tourist Profiles for those visiting South Frontenac and Frontenac Islands		
Up and Coming Explorers	<p>Typically, this group are young families, aged 18-34 with children and have diverse backgrounds, including visible minorities (45%) and immigrants (40%).</p> <p>This group is recently affluent and emerging into a new life phase that includes fresh experiences such as travel. Travel is seen as an opportunity to learn and explore as a nuclear family. Typically this group starts with tourist destinations nearby and visits areas typically considered to have core tourist attractions.</p> <p>Typically rely heavily on the internet to plan trips including accommodation websites and online travel agents.</p> <p>57% visit attractions such as amusement parks/zoo/aquariums.</p> <p>70% plan trips around the world's most famous sites.</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">45% hotel/boutique hotel23% friends/family22% motels10% resorts
Sports Lovers	<p>Typically, this group is middle-aged men, aged 35-54. They are enthusiastic about sports and see themselves as more active than typical travellers, although, in reality, they look for rest and relaxation more than other groups.</p> <p>Typically, they are looking for organized sports and golf.</p> <p>50% attend sporting events and 37% say it is their main reason to travel.</p> <p>47% take part in sports while travelling.</p> <p>16% played golf on their most recent trip.</p> <p>38% rely on family friends for travel planning, 22% use their own experience, 15% use brochures and 11% use associations.</p>	<ul style="list-style-type: none">55% hotel/boutique hotel19% family/friends11% motels7% resorts



Segment	Definition	Accommodation Choices
Family Memory Builders	<p>Typically, this group is made up of couples with young children, aged 35-54. They have built their lives around their children and are looking for tourism experiences that allow them to spend time as a family.</p> <p>45% visited amusements parks, theme parks, zoos, aquariums.</p> <p>54% went shopping and 42% visited a beach.</p> <p>77% want to connect with family on vacation and create lasting memories as a family.</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">51% hotel/boutique hotel27% family/friends13% motels8% resorts
Additional Tourist Profile for those visiting Central and North Frontenac		
Outgoing Mature Couples	<p>Typically, this group is made up of older, retired couples aged 55+ with below average income. Travel is seen as an opportunity to enjoy the company of others, and socializing with fellow travellers as well as locals.</p> <p>Typically for this group, travel is seen as an opportunity to stay active and relax rather than adventure or exploration of new cultures.</p> <p>31% believe socializing and meeting new people (travellers and locals) is one of the greatest benefits of travelling.</p> <p>77% enjoy group tours because they can sightsee in vibrant cities, visit museums, galleries, landmarks and gardens.</p> <p>Enjoys culinary experiences (40%), beaches/resorts (43%) and natural wonders (30%).</p> <p>Plans vacations using word of mouth recommendations, printed materials and online sources including accommodations websites to a lesser extent.</p>	<ul style="list-style-type: none">30% hotel/boutique hotel28% motels25% family/friends8% rental cottages

Source: TNS, Reference Report- Accommodations in Ontario (2012), TNS, Tourist Segments (n.d.)



3. Community Consultation

3.1 Engagement Process

In order to develop an understanding of the tourism and accommodation sector throughout Frontenac County, tourism related business and stakeholders were interviewed. The stakeholder engagement process was extensive and included Brand Ambassadors, accommodation providers, and community organizations/leaders. The following captures the key themes uncovered through the interviews. These themes are subdivided into tourism related and accommodation-related findings.

Some general comments heard included:

- The vast majority of tourists are coming to the Frontenac region for an experience, most often for outdoor activities and an escape/change from everyday life in urban areas.
- Frontenac County has significant tourism related opportunities but lacks the accommodation and restaurants and other traveller amenities to support the industry to its full potential.
- There is a general feeling that there are a lot of tourist related opportunities but there is a lack of awareness outside of the Frontenac region of these opportunities.
- There is a need to develop accommodations and opportunities which cater to the types of tourists who come to the area. Campsites, Airbnb and small bed and breakfasts are considered more nimble than hotels or motels and are better suited for the types of visitors who travel to the Frontenac region.
- The majority of travellers come from outside the area, including Kingston, Toronto, Montreal and Ottawa as well as a recovering United States market.

3.2 Emerging Themes

3.2.1 Tourism-related themes

- **Nature Based/Outdoor Activities** - Overall, there are a significant number of outdoor opportunities throughout the Frontenac region, including hiking, cycling, motorcycling, hunting, ATVir and snowmobiling as well as water-based actives including fishing, paddling and canoeing. Related to these activities is the opportunity for camping and visiting lakes and forests.
- **Experiences** - Tourists are looking for an experience (i.e. lake, culinary, studio tours, community events) with waterfront and lake activities being the primary demand generators for the Frontenac region. Tourists to the Frontenac region include families, groups of adults, couples and millennials, all looking for opportunities which cannot be experienced in more urban settings.
- **Artisan Assets** - The Frontenac region is also home to a number of artisans and community events, which help to attract visitors. However, other than an annual 'tour' there is a lack of coordination and promotion of local artisans as well as opportunities for tourists to view and purchase products.



- **Signature Attractions** - Other significant tourist assets include world class attractions such as the Frontenac Arch Biosphere and the Dark Sky Preserve, both of which are open year-round. The Frontenac region is the home to several annual events including the very popular ATV rallies in North Frontenac which can draw up to 1,000 participants as well as other community events including Verona's Garlic Festival and Day of the Pig.
- **Camping** - Camping is a big attraction in Frontenac County with a full range of camping services and facilities including Bon Echo Provincial Park, Sharbot Lake Provincial Park and Frontenac Provincial Park. North Frontenac is unique due to its abundance of crown land and the North Frontenac Parklands which offer opportunities for 'wilderness experiences'.
- **Farm to Table** - Local businesses such as Five Star Farm (Harrowsmith), Seed to Sausage (Sharbot Lake) and Back Forty Cheese (Mississippi Station) have realized the benefits of culinary tourism in the Frontenac region. The attraction of tourists to experiential and food related attractions holds significant tourism potential as well as being a stopping point to meet locals and other tourists.
- **Trails** - With the popularity of the ATV rallies (and snowmobiling in the winter months) in the Frontenac region visitors who will make use of trails networks are a significant and very important emerging segment of the tourism potential of the region. The K&P Trail is an excellent recreational asset and is augmented by other smaller trails throughout the area.
- **Identified Trends** - Tourism trends were discussed as the modern landscape of tourism has created a new set of challenges in meeting the needs of tourists to the Frontenac region. Trends identified by stakeholders are:
 - More birders, hikers and cyclists are coming to the Frontenac region
 - Increasingly, Frontenac is seeing more individual travellers and families rather than large touring groups
 - The Frontenac region is welcoming more millennial travellers who are interested in culinary and adventure camping/glamping as well as older travellers who want to keep fit with moderate outdoor activities
 - More travellers are visiting in the spring and fall to experience nature during quieter times
 - The lakes are getting more permanent residents than transient visitors
 - American visitation is beginning to rebound with the recent fall in the value of the Canadian dollar
- **Identified Opportunities** - There are many opportunities for future growth given the assets of the Frontenac region which are closely matched to its visitor demographics. Opportunities to expand on current assets and increase tourism potential were noted as:
 - Better signage and mapping of trails and canoe/paddling routes and grooming trails for the winter months
 - The creation of more multi-use trails
 - Additional year-round restaurants and eating establishments located near trails



- Increased promotion of seasonal and shoulder season opportunities (e.g. hunting, snowmobiling), which would require ensuring that accommodations also remain open during those times
- Increased promotion/marketing of the Frontenac region as a whole and its individual townships as well as the Rideau Canal
- Stronger partnerships and relationships between the Frontenac region and its local municipalities with tourism related businesses
- Branding the Frontenac region as an eco-tourist friendly place, with local food and beverages and shops
- Improvements to docking areas for Wolfe Island travellers
- Increased presence of visitor information centres or points of information at local establishments (note: with the exception of the 'Outgoing Mature Couples', all of Frontenac's visitor profiles rely on the internet and word of mouth for travel planning)
- Renewed relationships with the Land O' Lakes Tourism Association and the two Regional Tourism Organizations represented in Frontenac County

3.2.2 Accommodation-related themes

- **Seasonality** - The busiest months for accommodations are the summer months. The hunting and snowmobile season also bring in travellers but there is a lack of accommodations that remain open in the winter due to high operating expenses.
- **Availability** - Concerns were raised about the lack of accommodations for single/double night accommodations as most accommodators are booked with seasonal visitors or only take bookings for a full week/weekend. Concerns were also raised about the limited supply of accommodations throughout the Frontenac region, leading travellers looking elsewhere for accommodation, particularly in the Kingston market.
- **Broadband** - Concerns were raised about the limited and sporadic broadband and cellphone connectivity in some areas of the Frontenac region. Broadband connectivity is increasingly becoming a necessity to the accommodation sector. Operators are concerned that more travelers are requesting broadband Internet access in their accommodations. Local operators noted that competitors in other parts of the province have been growing its broadband offerings. As broadband's importance to the industry grows, accommodation operators in Frontenac are beginning to invest in broadband networks, services, and applications but are still lacking the infrastructure to do so.
- **Identified Trends** - Accommodation trends were discussed as the profile of the visitor and their needs have changed significantly over recent years. Trends were identified as:
 - ATVers look for bed and breakfasts and cottages over other types of accommodation
 - More Airbnbs are opening throughout the Frontenac region meeting the needs of some travellers interested in this type of accommodations and looking for a shorter stay solution



- Closing down of some cottage developments due to retirement or relocation. Many of these developments choose to sell their cottages to individual owners rather than sell the business as an entity
- Increasing desire by travellers to have wi-fi and internet capabilities
- Travellers have increased expectations in terms of their accommodations and are looking for a higher standard of amenities and security
- Cyclists and motorcyclists have different travel characteristics and look for unique services (e.g. providing security for their vehicles, transporting of luggage between stops)
- Bed and breakfasts are gaining in popularity with the 40+ segment
- **Identified Priorities** - Accommodation related priorities were discussed with the following suggestions:
 - More bed and breakfasts are needed close to primary activities (i.e. trails, lakes)
 - Alternative accommodations like yurts, cycling pods or glamping facilities
 - More serviced camping and RV lots are required with additional transient spots for weekends and shorter stays
 - Fishing lodges catering to those who are interested in fishing, paddling and other water-based activities
 - Additional accommodations along the Rideau Canal, with a focus on bed and breakfasts as well as an opportunity to market and promote the Canal for on-water accommodations like boatels and houseboats
 - Increased accommodation open year-round which also have restaurants for locals and visitors travelling throughout the region
 - Shorter term accommodations, for one or two night stays
- **Identified Barriers** - Barriers to accommodation development were significant in some cases given the cost of infrastructure and limited access to funding:
 - The initial cost of development (e.g. septic tanks and water systems)
 - Accessing funds to support installation of electricity, water and roads
 - The lack of a water-side gas station and sewage dump station on Wolfe Island hurts the community in attracting boaters
 - The amount of permitting required starting and operating a business
 - The lack of communication and cross-promotion between communities within the Frontenac region and between the RTOs and the local municipalities
 - Smaller campgrounds find it difficult to compete with provincial sites who have more convenient booking engines and marketing reach
- **Identified Opportunities** - Future opportunities were discussed with the following comments:



- Frontenac County and Township develop/resource guides to facilitate the permit and approval process for those interested in accommodation and tourism related businesses
- Frontenac County managed marketing strategy to attract entrepreneurs to start an accommodation/tourism related business
- Utilize the online reservation infrastructure being used by North Frontenac Parklands
- Develop partnerships between local municipalities to market and promote the region as a whole supporting existing accommodation and tourism businesses and helping to incentivize new ones
- Accommodators to improve their marketing through their websites including photos and more relevant information
- Increased use of Brand Ambassadors as points of information, mentorship and promotion of the Frontenac region as a place to invest and visit
- Development of on-site experiences at accommodations (e.g. farm related activities, wood chopping, spiritual guidance, food/culinary/cooking experiences)

3.3 External Stakeholder Consultations

In addition to internal stakeholders described in earlier, interviews were held with a group referred to as 'external stakeholders'. This group included those considered to be influencers engaged in sectors pertinent to this strategy and its goals. Groups consulted included:

- Tourism Kingston
- Kingston Accommodations Partners
- Regional Tourism Organizations 9 and 11
- Ministry of Tourism, Culture and Sport Industry and Investment Consultants
- Real Estate professionals
- Frontenac Community Futures Development Corporation
- Land O'Lakes Tourist Association
- Hotel/Resort Developer

The following are emerging themes from these conversations.

- **Ministry of Tourism, Culture and Sport – Ministry Industry Advisors and Investment Consultants, Regional Tourism Organizations**
 - The primary point of promotion is Wolfe Island given its proximity to Kingston and its unique ferry/island experience. Frontenac does not have any strong tourism attractions but does have an exceptional outdoor product and is known for its position as a 'cottage country' area and an area rich in lake and waterfront experiences.



- It was felt that the 'soft wilderness' approach (e.g. outdoor recreation, trails, snowmobiling) would be best suited to Frontenac rather than attraction development. Development needs to take place to improve the calibre of the experiences while not compromising its 'rustic' qualities.
- It was felt that investment into facilities and development in the Frontenac region will, for the most part, not be from external investors due to the risk involved in developing in a rural area. Investment will likely come from within the Frontenac region or its 'friends' – ex-pats are an excellent source of external/internal investment.
- Funding programs for events and non-capital infrastructure can be applied for through the Regional Tourism Partners' Partnership Funds and the Eastern Ontario Development Fund (EODF). Events can access funding via Celebrate Ontario and larger events can apply for Blockbuster Funding also through the Ministry of Tourism, Culture and Sport which supports major events with a budget over \$1M.
- Ontario Highland's (RTO 11) key tourism generators focus more on the stronger assets in the Ottawa fringe area than the Frontenac region (e.g. white water rafting, hunting). While these assets may be available in the Frontenac region, the lack of accommodations and tourism services make it a less popular area.
- Frontenac has to determine a strategy that differentiates itself from other areas offering similar products and experiences. A significant set of assets is its proximity to 1000 Islands and Kingston – areas which can be used in combination with assets currently within the Frontenac region and new ones that will round out a strong tourism product offering. Offering a quality product with exceptional service will be key. Glamping was considered to be a 'natural' product to pursue which would be unique and marketing worthy with a minimal investment.
- It was considered imperative that Frontenac County and its municipalities remain connected and interactive with the Regional Tourism Organizations and Land O'Lakes Tourist Association to ensure inclusion in a strong marketing strategy as well as staying aware of opportunities within all organizations to benefit tourism and accommodations partners within the Frontenac region.

- **Local/Regional Tourism Organizations – Tourism Kingston, Kingston Accommodations Partners, Land O'Lakes Tourist Association**
 - Organizations promoted experiences to their guests/visitors primarily, particularly cycling, hiking, boating, trails, nature and wilderness experiences.
 - The experience of Wolfe Island is the ferry and the views of Kingston harbour from this viewpoint. Some visitors take advantage of the trip to visit a restaurant or the beach but the ferry trip experience is the main generator for visiting the islands. The annual music festival is popular on Wolfe Island. The ferry also generates problems given the length of time between ferry dockings and the winter docking which makes it impossible for visitors to walk to the village of Maryville.
 - Hotels in Kingston will be obliged to pay a 4% hotel/hospitality tax starting in January 2018. This is a municipal fee and will replace the voluntary 3% Destination Marketing Fee which has funded the local accommodation partnership. This will not eliminate the Destination Marketing



Organization; however their budget may be compromised due to the new funding model through the municipality.

- All stakeholders were unanimous in their opinion that, if available, guided tours of Frontenac would be embraced by visitors, tourism operators and accommodators. This would be similar to the model that Prince Edward County is benefiting from where people tour by bus to experience wines, craft brews and beaches. Frontenac could promote its five best experiences (e.g. a day on the lake, fishing or cycling/hiking on the trails).
- Kingston's tourist information centre indicates that a popular inquiry is where to go for nature based experiences – second only to what is available to do in Kingston. The centre refers visitors to the Frontenac region frequently and stocks DMO guides as well as the Frontenac Provincial Park newspaper. They would be very interested in carrying more information from individual Frontenac operators as well as any municipal publications. Guided tours are often requested. Ahoy Rentals, a Kingston company, is now offering cycle rentals and is promoting touring on Wolfe Island as part of their online promotions.
- The Land O'Lakes Tourist Association has a new marketing plan in place which will give more exposure to the Frontenac region in the future. The organization indicates they work closely with the Townships who are encouraged to continue participation within the organization and communicate with them to update and promote experiences and events. It is felt that the Townships need help with their marketing, particularly social media, due to a lack of dedicated tourism staff. Other counties (Lennox and Addington and Hastings) are now ahead of Frontenac County in terms of tourism staffing and marketing efforts.
- It was felt that partnerships between the RTOs as well as Land O'Lakes Tourist Association would be welcomed. Partnerships have existed in the past and there are ongoing projects in the area of cycling between the RTOs as well as joint promotion of a new Rideau Canal luxury boat rental venture, Le Boat, to be based in Smiths Falls, beginning in May of 2018. Successful partnerships between the RTOs and Land O'Lakes Tourist Association have also taken place in the past particularly for marketing of fishing experiences.
- RTO 9 indicated that cycling remains as one of their strongest experiences. They have published cycling routes along the entire tourism region which also encompasses parts of Frontenac County (thegreatwaterway.com/pt-explore/hiking-cycling).

- **Real Estate Professionals**
 - Real estate professionals noted that the accommodations and tourism sector, particularly in Central and North Frontenac are a remnant of what they were. Related, and adding to the worry, is the belief that the heads of the families who built the tourism businesses of the past are no longer alive or have retired and, for the most part, their children and grandchildren have not taken up the entrepreneurial challenge. Properties which were sold to outside interests suffered from owners not being present year round and from lack of investment. Ultimately, the properties have declined. The main challenge behind this, as one looks forward, is that the 'easiest' business investment to find is from those who live in the immediate area – those who are personally vested in the success of a region. Without them finding investment is much more challenging.



- The Canadian Shield lakes of South, Central and North Frontenac are being scouted by property buyers from ever further afield. The area is definitely on the map for those in the Ottawa Area, Greater Toronto Area and even Southwestern Ontario who are trying to find waterfront property that is less expensive than that found in the Kawarthas, Prince Edward County, Haliburton and Muskoka. Evidence of this occurred earlier in 2017 when a cottage development sold to enthusiastic new owners who remain committed to the business and to being a part of the tourism industry. The former property owner indicated that it is critical to engage a realtor that is familiar with the area and has an appreciation for the beauty of the area and shows a commitment to showcasing the property, the Township and the County as an entire 'package'. As a result of applying this criterion, the property owner hosted 25 viewings and eventually entertained multiple offers before settling on new ownership for the development. The profile of the potential buyers were from the Peterborough/Toronto/Hamilton areas, were mostly over 50 and retired, although some clients were 39 – 42 and looking to the property as a business venture rather than retirement income potential.
- The area is better suited to smaller scale accommodations than larger developments, allowing excellent quality of service and the personal touch that tourists appreciate. Most of the prospective clients were interested in expanding the current offerings to include shoulder and winter season activities. The primary generator and motivator for interest in properties in Frontenac was the ability to earn a living while enjoying a pristine and enviable quality of life in the Frontenac region.
- Concern was expressed about the ability for accommodation investors to start new developments on lakes. Beyond provincial regulatory and Crown Land/Land Claim barriers, other property owners have also been known to get in the way. An excellent example of this is the withdrawal of a plan to build an eco-tourism resort on Sheldrake Lake (Lennox and Addington County) in 2009 which was proudly fought against by the Skootamatta District Ratepayers Association.¹

- **Hotel/Resort Developer**

An interview was held with a hotel/resort developer and hospitality management professional with the following comments:

- Demand generators are the prime reason that hotel sites are chosen – demand generators are the main reason that prompts someone to travel and visit an area on a vacation or shorter stay getaway. There have to be multiple demand generators. Hotel developers will look to see if there is economic activity – optimum size of a community is 10,000. There has to be some major industry in the community (e.g. retail, manufacturing, government services). The site has to be within 2 hours of a major centre.
- Infrastructure is critical and water and sewer services are imperative. Supportive services are essential such as restaurants, gas stations, shopping, markets etc. A cluster of supportive services and amenities would be necessary to support hotel traffic and create a 'destination'.

¹ http://skootamatta.ca/files/5713/8120/1974/Newsletter_2010.pdf



- There has to be 'weekend traffic' (e.g. attendance at sports tournaments, ski hill, waterslide). Hotel developers will look for a leisure attraction generator. Snowmobiling would be 'extra' if you already built a hotel but is not enough to generate traffic especially in the non-tourist months.
- Build an industry on upscale cottages, upscale camping/glamping. With this type of concept there also has to be attractions which could be built around lakes (e.g. beach, boating, trails, waterslides, farmers markets, artisan shopping, water activities). Could also consider an exclusive resort/spa type of business where the resort becomes the attraction and would include such features as beach, golf, spa services, spiritual activities, equine activities, yoga, spiritual healing, health and wellness, etc.



4. Opportunity Identification

4.1 Best Bet Opportunities

Based on the findings from the engagement and research phases, the following five opportunities were identified as 'best bet' areas that can support Frontenac County's tourism industry:

1. Bed and Breakfast Accommodations
2. Redevelopment of Existing Cottage Accommodations
3. Pod-Based Accommodations
4. Upscale Camping and Campground Accommodations
5. Niche Resort Accommodations

Where applicable these opportunities are further linked to a specific asset and where information was available the specific development sites associated with that opportunity. Investment toolkits were created for each best bet area to be used by Frontenac County and its partners to generate new interest and investment in the region.

Appendix A provides Ontario and New York State case studies and lesson learned for these accommodation alternatives.



4.2 Opportunity One: Bed and Breakfast Accommodations



What is a Bed and Breakfast?

A bed and breakfast is a small lodging establishment that offers overnight accommodation and breakfast. Bed and breakfasts are often private family homes and typically have four rooms. A normal bed and breakfast usually has the owner or manager living in the house where the guests stay.

Generally, guests are accommodated in private bedrooms with private bathrooms, or in a suite of rooms including an ensuite bathroom. Some homes have private bedrooms with a bathroom which is shared with other guests. Breakfast is served in the bedroom, a dining room, or the host's kitchen.

Bed and breakfasts and guest houses may be operated as either a secondary source of income or a primary occupation. Often the owners themselves prepare the breakfast and clean the rooms, but some bed and breakfasts hire staff for cleaning or cooking. Properties with hired professional management are uncommon (unlike inns or hotels) but may exist if the same owner operates multiple bed and breakfasts.

Potential in Frontenac County

While most hotels offer traditional rooms in humdrum buildings, each bed and breakfast is unique in its architectural style, guest room decor, and amenities offered. Bed and breakfast styles range from elegant to rustic, and are reflective of its community character and surroundings. For Frontenac, bed and breakfasts offer the ability to introduce accommodations into communities where demand generators are not as abundant. Bed and breakfasts can provide an alternative to cottage and campground accommodations in areas that are adjacent to lake access and trails. Bed and breakfasts are predominantly small owner operated and can be flexible to operate as additional commercial uses (e.g. breakfast service for residents and visitors). The Frontenac Community Futures Development Corporation (CFDC) has also previously offered workshops on how to start a bed and breakfast.

Challenges with bed and breakfast development across Ontario include the variant regulations placed by existing municipal zoning and taxes, technology changes and social media upkeep, accessibility legislations required for accommodators and changing guest expectations (e.g. increasing preference for private bathrooms).



4.3 Opportunity Two: Redevelopment of Existing Commercial Cottage Accommodations



What does Redevelopment of Existing Accommodations Look Like?

Just a decade or two ago, cottage rental expectations were far less demanding and much more adaptable in terms of what was acceptable in a rental property. At the time, that tourist demographic identified self-sufficiency as the key to enjoying a great family vacation. Television access and internet were rare. Tourists focused on creating their own fun. However, cottage rentals have evolved and commercial properties in Frontenac have, largely, been slow to react (or unable to react in the case of Wi-Fi ability). Privately owned cottages are easily and inexpensively advertised on the internet as alternatives to hotels and resorts. They have taken significant market share and upped consumers' overall expectations, which now include plenty of indoor entertainment options, posh beds, round-the-clock access to owners, heating and cooling, broadband, renovated rooms and, in some instances, stocked cupboards and refrigerators. Commercial operators have also faced increased regulations on water that are expensive to install and maintain.

Potential in Frontenac County

Currently Frontenac has 46 commercial cottage rental properties, each containing between 1-40 cottages and are promoted across several directories. Of these 46, the majority are available for rent only through the summer months. Conversations with cottage owners have suggested that the majority of cottages are considering or have committed upgrades to properties to meet the demands of today's clientele.

As has been shown, there has been a significant loss of this type of accommodation in the last two decades and there is the threat to lose these commercial properties to residential zoning. There are several ways that an enhanced cottage product could assist in generating economic activity. Firstly, cottage rentals operate in small scale and, compared to hotels or inns, require less investment. It is an easier way for outside investors to buy into Frontenac. The CFDC also provides short-term opportunities to obtain access to capital for a portion of the renovations. Cottage rentals also provide more flexibility in times when unstable demand and market uncertainty are constant challenges. Encouraging the redevelopment of existing commercial cottage rental properties can also extend the operating season into spring, summer and winter.



4.4 Opportunity Three: Pod-Based Accommodations



What are Pod Based Accommodations?

A growing segment of the tourism industry believes that price-conscious travellers will happily stay in tiny spaces as long as they are well designed. In these lodgings, which have been dubbed "pod-based accommodations," space and amenities like staff and restaurants and sometimes even bathrooms and windows are sacrificed in exchange for greatly reduced rates and ramped-up style. Pod-based accommodations have been around Asia for decades, but have been slow to materialize in the western world. However, the trend over the past decade in Britain and parts of the United States indicates that it is quickly becoming a requested commodity. In general, pod-based accommodations are well designed for short stays or for people who are not looking to spend much time at their accommodation.

Potential in Frontenac County

One of the emerging challenges with the Frontenac region is the amount of available one-night-stay accommodations, particularly a harder challenge in the off-season months. Pod-based accommodations can present an alternative choice of accommodation with nature lovers and sports lovers, two of the top tourist profiles in the region. These tourists are often out and about away from their accommodations either cycling, ATVir, snowmobiling or hiking and are interested in low-rate accommodation options to rest. Across Britain, pod-based accommodations have become part of trail infrastructure. The pods are often located on premises near or around trailheads. The pods have also been located on non-conventional properties like farms, churches, community centres, and libraries.



4.5 Opportunity Four: Upscale Camping and Campground Accommodations



What are upscale Camping and Campground Accommodations?

Upscale camping or 'glamping' is a luxury camping experience that offers modern facilities and services, such as wi-fi, and is typically aimed at higher income customers who may not typically camp. Popular trends include vacationing in roofed tents, pods, treehouses, tepees, yurts and cabins.

Potential in Frontenac County

The domestic market for upscale camping is growing in popularity in part due to the increase in prices of overseas vacations. The Frontenac region has already established itself as a camping destination. Across the area, tourists can camp at Provincial Parks, Crown Land, conservation grounds and lakeside properties. In some instances, campgrounds in Frontenac have begun to introduce upscale camping units. The tourism trends illustrate that several outdoor major festivals are looking for destinations that can offer attendees a variety of camping options including upscale units. The trends also illustrate that the upscale camping market is expected to continue to grow, particularly in the urban traveller segment.



4.6 Opportunity Five: Niche Resort Accommodations



What are Niche Resort Accommodations?

Niche resort accommodations are self-contained commercial establishments that endeavor to provide a specific vacationer want. The term resort refers to getaway experiences and not necessarily defined as hotel properties only. Examples of niche resort accommodations can include farm stays, exercise and health-oriented retreats, spiritual retreats, nature-based retreats, and hermitage cabins. These accommodations are focused on delivering on-site experiences with basic living amenities (food, water, washroom facilities) for a period of days.

Niche resort accommodations are gaining popularity throughout the world, as people become more interested in self-experiences and reconnecting either with themselves, spiritually, or environmentally.

Potential in Frontenac County

From yoga retreats to nature centres, a few niche resort accommodations are already present in the Frontenac region. However, these current resorts are larger in scale. A successful niche resort does not need to have multiple rooms and on-site facilities. Niche resort accommodations can leverage existing assets such as farms. Farm stays are a great example of a smaller-scale niche resort that is focused on delivering on-farm experiences to a select number of individuals. Niche resort accommodations could add to Frontenac's diverse portfolio of tourist experiences.



5. Strategy For Accommodation Growth

5.1 Preparing for Investment

The process by which any investment considers to locate in a particular community will typically fluctuate from investment to investment. This discrepancy can range from an initial direct investment or to a slower paced gradually established operation. Each investor will have their own methods and reasons for investing.

When it comes to sourcing out investment, a community can take a proactive approach and seek out opportunities that are a strategic fit. More frequently, information is being filtered and sought online before players are coming to the community, so it is important to have the necessary information prepared and readily available. Investment will more likely come to a place that is prepared. Many communities have basic market research available (e.g. population, labour force and a quick overview of economic sectors). But what does it mean to become investment ready?

Being investment ready means a community is prepared to provide and illustrate relevant, up-to-date information beyond a basic community overview. A community must understand what it wants for investment and then align itself accordingly. Sometimes particular investments will happen only if the community wants the investment as was illustrated above with the Sheldrake Lake proposed eco-tourism resort. As such being investment ready requires that a community have both the relevant information (marketing and sales components) and the wiliness of its residents and administration to want the investment (resource components).

Preparing for investment also requires a balance and execution of marketing and sales exercises. Marketing exercises include **asset assessment** (determining what it wants to sell and understand the strengths and weaknesses of its products and services), **target market selection** (determining which targeted groups are most likely to be attracted to the product and service's strength) and **promotional campaign development** (determining what forms of media that will most effectively reach out to the target markets).

Sale exercises include **prospecting** (identifying potential prospects who fit the profile and are able, willing and authorized to make a location decision), **pre-approach** (identifying and analysing all the information available to understand as much about the prospect as possible), **approach** (meeting and introducing the prospect to the community, establishing a rapport, that sets the foundation of the relationship) and **pitch delivery** (telling the story in a way that speaks directly to the identified requests of the prospect).

The most critical point in preparing for investment is that there are enough positive features of the products that the investments will be attracted to. The inFrontenac Brand Ambassador program is a great first step in recruiting an active audience that can promote, encourage and motivate investment within the Frontenac region.

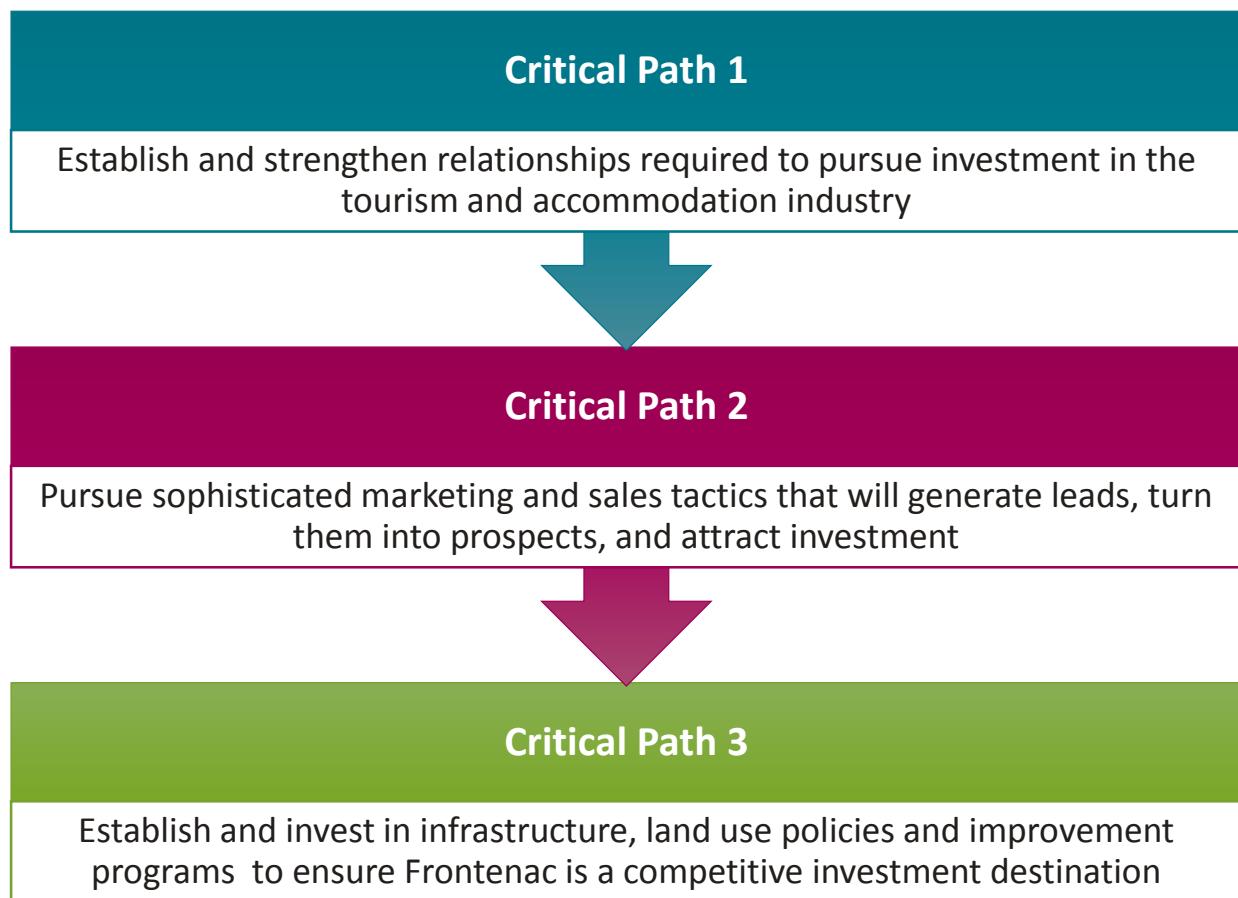


5.2 Action Plan

The following action plan identifies key goals for investment opportunities with regards to accommodation development and provides guidance on the best practices for achieving goals, including specific tactics, activities, and timeframes. However, more importantly, it sets a critical path for Frontenac County staff and their partners to follow. The actions in the plan are divided into three strategic objectives emerging from the purpose of this analysis and focused on assisting the region's municipalities in increasing their competitiveness for tourism investment in Ontario and Canada.

The associated actions are prioritized as immediate (within a year), short (within two years), and long term (3 years+) to provide an indication of the urgency with which the action should be pursued.

Figure 9: Critical Paths to Investment Attraction





Critical Path 1 Establish and strengthen relationships required to pursue investment in the tourism and accommodation industry

#	Action	Details	Partner(s)	Timing (Years)			Budget Allocation
				0-1	1-2	3+	
1	<ul style="list-style-type: none">▪ Set up a steering committee to provide direction on rolling out this strategy and act as the primary connection to accommodation development in the community.	<ul style="list-style-type: none">▪ Set up a steering committee with representation from each municipality, the Community Futures Development Corporation, tourism businesses, Land O'Lakes Tourist Association (LOLTA), and RTOs▪ Reach out to regional economic development officers and tourism managers on a semi-annual basis to track updates on regional investment projects, new investors to the area and report back to the working group.▪ Work to continue improving the profile of accommodation opportunities in the area.	Frontenac County Municipalities LOLTA RTO 9 and 11 CFDC Ontario East Economic Development Corporation (OEEDC)				Staff Time
2	<ul style="list-style-type: none">▪ Use Brand Ambassadors as points of information, mentorship and promotion of the Frontenac region as a place to invest in accommodation development.	<ul style="list-style-type: none">▪ Educate Brand Ambassadors on the identified accommodation opportunities that are well-suited for Frontenac.▪ Provide Brand Ambassadors with promotional material that they can provide to potential investors.	Brand Ambassadors				Part of Brand Ambassador budget
3	<ul style="list-style-type: none">▪ Continue relationships with each municipality's administration to determine how Frontenac County can support its tourism industry, including accommodation operators.	<ul style="list-style-type: none">▪ Ensure all municipalities are aware of the investment initiatives that the County is pursuing in its area. Request that the municipality have a representative be present throughout any investment process.	Frontenac County Municipalities				Staff Time
4	<ul style="list-style-type: none">▪ Engage the realtor community that has an appreciation for the beauty of the area and shows a commitment to showcasing the region.	<ul style="list-style-type: none">▪ Create a small network of committed realtors who are active across Frontenac. Engage with the group once a month to determine properties of interest, discuss marketing tactics and determine potential sale opportunities.	Realtors				Staff Time



Critical Path 2 Pursue sophisticated marketing and sales tactics that will generate leads, turn them into prospects, and attract investment

#	Action	Details	Partner(s)	Timing (Years)			Budget Allocation
				0-1	1-2	3+	
5	<ul style="list-style-type: none">▪ Complete an annual investment marketing and sales action plan.	<ul style="list-style-type: none">▪ The focus on each plan will be to capitalize prioritize tactics with existing resources.					Staff Time
6	<ul style="list-style-type: none">▪ Continue to grow the exposure of the inFrontenac brand and website.	<ul style="list-style-type: none">▪ Work with regional partners and the provincial government to identify opportunities to promote the brand and website.▪ Add a resource centre to the website that includes available funding programs, on-line resources for tourism businesses, including accommodation operators, and a regional profile that has investment related data, key contacts, and maps out the existing tourism ecosystem.	RTO 9 and 11 LOLTA				Staff Time \$5,000 – 10,000 / year for website additions
7	<ul style="list-style-type: none">▪ Distribute toolkits to encourage the development or redevelopment of accommodation properties in Frontenac.	<ul style="list-style-type: none">▪ Any future toolkit should identify the value proposition of the accommodation opportunity and the key criteria for success.▪ Promote and distribute the toolkits to existing operators and new investors, illustrating the investment that the County has made towards the growth of these opportunities.▪ Customize resource contacts for each toolkit (specific to each municipality).	Frontenac County Municipalities				Provided with strategy Staff Time
8	<ul style="list-style-type: none">▪ Ensure that current and future promotional materials and tools are easily accessible and well-communicated to partners.	<ul style="list-style-type: none">▪ Promotional materials and tools must be available online and readily available to the user.▪ Create a promotional package for investors that can be easily customized. The package should include any prospectuses, available properties, recent analysis and immediate contact information.▪ Develop a searchable map-based online platform that includes commercial and development properties that are for sale/lease and businesses that are available for sale.					Part of marketing budget



Critical Path 2 Pursue sophisticated marketing and sales tactics that will generate leads, turn them into prospects, and attract investment

9	<ul style="list-style-type: none">▪ Develop an outreach program that includes a plan for strategically attending trade shows and events where lead generation activities are confirmed.	<ul style="list-style-type: none">▪ Connect with the Ministry of Tourism, Culture and Sport (MTCS) and Ontario East Economic Development Corporation on joining any external tourism related investment opportunity. Example MTCS's perfecting the pitch workshops and overseas tradeshow expeditions.▪ Many opportunities will come from investors within the community so investigate potential investment targets through local industry knowledge gathering.▪ Initiate a familiarization tour to host potential investors and influencers across the region.	MTCS OEEDC			Staff Time \$25,000 per year Including additional costs associated with MTCS and Fam Tours
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Critical Path 3 Establish and invest in infrastructure, land use policies and improvement programs to ensure Frontenac is a competitive investment destination

#	Action	Details	Partner(s)	Timing (Years)			Budget Allocation
				0-1	1-2	3+	
10	<ul style="list-style-type: none">▪ Work with local planning and development departments to review land-use policies in regards to potential accommodation opportunities.	<ul style="list-style-type: none">▪ Review local land-use policies that restrict the development of certain accommodations in certain areas. In most instances, the current identified opportunities are not prohibited in Frontenac. It is still important for investors to know all limitations to any accommodation development that is pursued.	Local Planning and Development Departments				Staff Time
11	<ul style="list-style-type: none">▪ Develop resource guides that encourage existing accommodation operators and assist future investors in navigating permits, incentive programs and approval processes.	<ul style="list-style-type: none">▪ The resource guides should include key local contacts for any planning and development related questions, a list of available incentive programs (ex. Community Improvement Plan incentives) and application forms for permits and incentive programs.▪ Promote the incentive programs to existing accommodation operators.	Local Planning and Development Departments				Staff Time
12	<ul style="list-style-type: none">▪ Working with the local municipalities, introduce an Accommodation Grant/Loan Program as part of community improvement plans.	<ul style="list-style-type: none">▪ The program should provide financial assistance in the cost of developing short-term and seasonal accommodations.▪ The program should specifically target areas of high potential (ex. lakefront properties, agriculture lands, commercial areas, and rural and town nodes).	Local Planning and Development Departments				Staff Time



5.3 Recommendations for Identified Opportunities

#	Recommendation
Recommendations for all opportunities	
1	Host workshops to educate existing and potential owners on the opportunities associated with developing short-term accommodations. Include a resource guide on how individuals can get started.
2	Expand, where applicable, the Community Improvement Plan definition and programs to include short-term and seasonal accommodations.
3	Leverage industry newsletters and websites to inform potential investors/entrepreneurs of available accommodation properties across the Frontenac region.
Opportunity One: Bed and Breakfast Accommodations	
4	Work with the Brand Ambassadors to include testimonials on the website and manuals which showcase traditional and unique bed and breakfast accommodation operators. Leverage testimonials to create a list that can be promoted and used in materials.
5	Propose policy amendments to local official plans to encourage (if applicable) (See Appendix A for examples): <ul style="list-style-type: none">▪ The development of bed and breakfasts on a variety of land uses including rural farmland, rural areas, urban cores or downtowns▪ The recognition of bed and breakfasts as commercial establishments eliminating the need of a property landlord to be living on premise.▪ The introduction of restrictions on short-term rental units that operate in a secondary dwelling or a residential unit outside of the main dwelling. For example, an individual owning a residential unit or secondary dwelling should not be allowed to promote and rent a bedroom or living quarter for five or less days to a visitor unless they are a registered commercial operation.



#	Recommendation
6	Encourage the development of a Bed and Breakfast Association among bed and breakfast operators across the Frontenac region and in adjacent communities. The association should support bed and breakfast operators by providing a forum for owners to come together to discuss relevant issues, collect and facilitate content that can be distributed to tourism websites, and help each other book guests when accommodations are full. The association can also provide training sessions for new bed and breakfast owners and sets standards for accreditation, based on bedrooms and bathroom, cleanliness, and breakfast offerings.
Opportunity Two: Redevelopment of Existing Cottage Accommodations	
7	Frontenac CFDC's strategic plan has identified upgrades to tourism accommodations as a focus area for continued investment. Working with the CFDC, promote the services and workshops offered by the CFDC to existing cottage rental owners.
8	Remain firm on maintaining commercial zoning when under pressure from residential developers.
Opportunity Three: Pod-Based Accommodations	
9	Propose policy amendments to local Official Plans to include (if applicable): <ul style="list-style-type: none">▪ Pod-developments as a form of short-term rental▪ Pod-developments to be an allowed use on properties adjacent to trailheads, existing campgrounds and in rural areas.▪ Allow the placement of pods on community facility property such as churches, parks, and libraries
10	Invest and encourage in the development of pod accommodations alongside K&P and Cataraqui trailheads to support a growing market. Investigate if funds for pod development are available from the Province's Tourism Development Fund as an element of its Cycling Tourism Plan.
Opportunity Four: Upscale Camping and Campground Accommodations	
11	Work with existing campgrounds and the CFDC to encourage the introduction of signature upscale camping products and experiences into the Frontenac region.
Opportunity Five: Niche Resort Accommodations	
12	Develop a short list of farm-based assets that could support the development of farm stay experiences across the region.
13	Host workshops to educate farmers, home owners and seasonal cottage/cabin owners on the opportunities associated with developing niche accommodations on their properties.



Appendix A

Case Studies for Accommodation Development

Upscale Camping and Pod-Based Accommodation Trends and Practices

Camping provides opportunities for families and friends to come together and enjoy the outdoors, creating life-long memories and discovering Ontario's natural landscape. Canadian campers are lively between the age of 25-34, often plan four camping trips per year to campgrounds less than 300 km away from home. It was estimated that in 2014, the camping industry contributed \$1.2 billion to Ontario's gross domestic product.

However, campgrounds have recently experienced a decline in visitors. Between 2000 and 2013, the number of overnight camping stays fell by 10% in Ontario's provincial parks. Visitors are increasingly turning to other nature-based experiences, including "glamping" in both private and public campgrounds. Glamorous camping or 'glamping' is a luxury camping experience that offers modern facilities and is typically aimed at higher income customers. Popular trends include vacationing in tents, treehouses, tepees, yurts, cabins, and lodges.

As an attempt to bring back campers, 14 national parks across Canada have developed oTENTik cabin-tents. These tents offer a blend of comfort with a taste of the outdoors, making the camping experience more comfortable, assessable and easier for visitors. Each oTENTik unit has three beds and can accommodate up to six people, acting as an accommodation for families, friends and couples of all ages.

A similar product is the pod-based accommodation developed by private contractors such as the Algonquin Pod Company. The pods use special roofing material to reduce noise and use a special type of wood and foil under the roof to regulate temperatures in the winter and summer. This allows the pods to be used throughout the year, helping to extend the tourism season.

Glamping also connects with the increasing interest in ecotourism. The Government of Australia has developed a number of best practices in supporting ecotourism development. These include key considerations such as:

- Natural and cultural compatibility with the values of the park
- Minimal footprint on park with the design and layout fitting with the character of the park
- Contributes to protecting and positively enhancing the park and encourages visitors to appreciate and want to protect and conserve the national park



Key considerations for businesses in Frontenac who are thinking of opening a glamping facility include:

- Discussions with a planning consultant to choose the most appropriate land and making the most of your facilities
 - Most glamping facilities are at least half an acre, providing space for visitors to enjoy the rural environment
- Understand your customers to create unique opportunities for visitors including outdoor activities like hiking, biking, wood chopping or farm work
- Invest in online booking systems to help grow awareness of your facilities and to increase accessibility to your property
- Start small and grow, building spaces and activities as you go

Relevance to Frontenac

- Camping facilities, including serviced facilities for RVs, provide a unique type of accommodation which allows visitors of all income levels to enjoy Ontario's natural environment.
- As ecotourism and glamping continue to rise in popularity and building on the rural nature of Frontenac, glamping facilities provide an opportunity to extend the tourist season, offering unique and small-scale accommodations.

Farm Stays and Niche Resort Accommodation Trends and Practices

In order to maximize the impact of agri-tourism possibilities, communities and governments have begun to develop agri-tourism policies. One important tool developed is the Ontario Ministry of Agriculture, Food and Rural Affairs' (OMAFRA) Guidelines on Permitted Uses in Ontario's Prime Agricultural Areas, which provides support to municipalities, decision makers, and farmers on interpreting the policies in the Provincial Policy Statement 2014 (PPS). Permitted uses and activities are broken into three categories as a method to maintain the land based for agriculture uses as well as support value-added agriculture. These categories are agricultural uses, agricultural-related uses and on-farm diversified uses. On-farm diversified uses are:

- Located on a farm
- Secondary to principal agricultural use of the property
- Limited in area (ensuring that agriculture remains the main land use)
- Includes, but is not limited to, home occupations, home industries, agri-tourism uses and uses that produce value-added agricultural products
 - This could include farm vacation suites, B&Bs, and seasonal events
- Compatible with, and shall not hinder, surrounding agricultural operation

The criteria used to determine if a use can be considered an on-farm diversified use is often tied to the element of scale and the necessity to limit the amount of land removed from agricultural use. The



guidelines recommend that municipalities consider the use of partial lot zoning for on-farm diversified uses, whereby a portion of the property dedicated to this use would be zoned for those use with the remainder of the property remaining in an agricultural zone.

A number of tourism organizations across Ontario and Canada have identified agri-tourism as an opportunity for farm operators to enter new markets for farm products and services and suggested that the growth of agri-tourism provides opportunities to more fully utilize farm resources while providing additional income for farm families. Opportunities identified include bed and breakfasts, farm vacations, seasonal festivals, school tours and roadside markets.

In this regard, OMAFRA has developed a guide *Developing Agri-Tourism Operations in Ontario* that encourages the creation of alternative accommodations. The Minnesota Institute for Sustainable Agriculture's *Diversifying Your Farm Business through Agri-tourism* has also provided information on regulations related to developing assets (e.g. licensing, zoning and land use designations) and marketing opportunities and information and stress the importance of understanding the market prior to product creation. It also discusses the importance of online reservations, as travellers increasingly use only online methods to plan and book their vacations. The rural nature of the County and its member municipalities provide opportunities for the growth of agri-tourism based accommodation opportunities, leveraging natural and cultural characteristics to broaden the tourism sector locally.

Relevance to Frontenac

- Understanding how to connect and leverage agricultural areas and rural settings to support alternative accommodation and agri-tourism will help to position the Frontenac region.
- Through developing and adhering to dedicated agri-tourism policies, the County and its municipalities will be able to grow the agri-tourism sector and provide clear guidelines to enable residents to take advantage of agri-tourism related opportunities including on-farm accommodation and farm related tourism.

Redevelopment of Commercial Cottage Rentals Land Use Policies and Practices

A number of communities in Canada and the United States developed innovative land use policies to support the creation and renovation of cottage rentals, restricting the size of the building as well as promoting housing affordability and greater choice by encouraging smaller and more diverse home sizes and mixes of income levels. Michigan has developed a *Redevelopment Ready Communities* waterfront planning toolkit and guideline. Included in the toolkit are discussions related to:

- Developing sustainable Waterfront Plans based on current and future needs. This includes conducting an inventory of existing water-dependent businesses, facilities and opportunities and developed land use policies which give priority to tourism-related businesses and compatible waterfront industrial uses
- Ensuring the developing of the waterfront protects the historic and scenic character of the community while also providing opportunities for visitors and residents



- Developing specific zoning regulations including view protections (e.g. fence and pool restrictions, shoreline setbacks), identifying specific uses (e.g. boat clubs, marinas, recreational uses), including provisions for docks and piers, as well as providing minimum water frontage and depth of parcel guidelines

To support environmental sustainability, the Muskoka Watershed Council has developed a Best Practices Program to support the public and local businesses to provide advice on how to live, work and develop properties along a watershed. This program is being developed in partnership with local businesses as well as municipal governments. Best practice tips related to septic systems, natural shorelines, low impact development and caring for woodlots, and is disseminated through brochures, newspapers, workshops and community events. Best practices discussed include:

- Understanding the best type of septic system for your needs and recognizing maintenance requirements
- Using only native species if doing any planting around your wetland and recognizing the recreational opportunities which exist (e.g. birding, canoeing) and impact (e.g. improve water quality and reduce flooding)
- Using low impact development and LID features including rain barrels, grass swales and stormwater management

Additionally, to support the sustainable development along waterfronts, the Federation of Ontario Cottagers' Associations has developed a Lake Capacity Assessment, in cooperation with member associations and planning practitioners. The Assessment is designed to act as a tool to assist in evaluating the efforts of cottage development on inland lakes, similar to those found in Frontenac. Key considerations included in the assessment include:

- Density of shoreline development/overcrowding
- Amount of available developable land
- Aesthetic considerations (e.g. light and noise pollution and boating traffic)
- Recurrent water quality problems and/or algal blooms

The environmental considerations are critical for ensuring the success of cottage development along waterfront areas in Frontenac County. However, it is important to understand the land use policy and zoning requirements, which support the creation of sustainable cottage communities. Building off existing resource on cottage zoning, Frontenac would be excellently placed to support the creation of long-term, sustainable cottage development, leveraging existing tourism assets like the Rideau Canal.

Relevance to Frontenac

- While it is understood that the Rideau Canal is an important tourism asset, opportunities exist to develop sustainable cottage developments, guided by policies which support long-term viability and sustainability of the waterway and the tourism sector.
- Cottage housing development not only supports the creation of a greater variety of residential opportunities but also supports additional tourist related accommodation, suitable for families and groups of tourists alike.



- By working with cottagers and businesses along lakefronts throughout Frontenac and along the Rideau Canal, the County and its municipalities could guide cottage development to ensure sustainable development which supports resident, business, and tourist's needs.

Examples of Brand Ambassador Programs in Other Jurisdictions

Brand Ambassadors support the economic development and tourism efforts of a community and, at the same time, develop a network of people who create a high energy exchange of ideas and knowledge that foster personal and professional growth, expanding the reputation of the area. In a time when advertising dollars can be limited, Brand Ambassadors can provide an extremely valuable source of promotion to an area that would not normally be available or affordable. The challenge of a Brand Ambassador Program is to capture the talent, energy and enthusiasm of local residents and best equip them with the tools they will need to promote Frontenac County in a way that will create a positive image for the area and create momentum to support growth.

A Brand Ambassador Program should be designed to meet the specific needs of the community through established goals and programs. Firstly, it should be noted that there are two kinds of 'Ambassadors' that Frontenac County can initiate.

1. Front Line – some Ambassador Programs are meant to inspire and train front-line employees and volunteers to make every visitor experience into a positive and long lasting impression. While significant dollars are spent on marketing, the first impression is the most important and front-line staff must be engaged and onboard with providing the best experience for the visiting tourist possible. This type of service generates positive (in person and online) word of mouth and will in turn generate return visits as well as new.

There are several companies providing front line customer service training including RTO 9 and RTO 11. Additionally, OTEC provides innovative training and certification programs for tourism hospitality and service industries through their 'Online Tourism Excellence Ambassador Program'. They are well known for their customer service training and service strategy development for destinations and often work with DMOs and tourism businesses to development Tourism Excellence Ambassador Programs that meet the unique needs of each destination. Frontenac County could access more information and evaluate the options to provide this training at:

<http://www.otec.org/Training-Solutions-Overview/Tourism-Excellence-Ambassador-Program.aspx>

2. Local Residents and Business Owners – this type of Ambassador Program is delivered by local residents and current/retired business people most typically are associated with the tourism industry and who have a strong sense of pride in their area and are anxious to 'spread the word'. Administration of this type of Brand Ambassador Program can be managed at the County level and is worthwhile for assistance at trade events, fam tours and media events. Local Ambassadors can be extremely valuable as local experts with subject authority on core attraction themes and encourage content from them and other local resources.



Case Studies

Leduc Nisku Economic Development Authority (EDA) has created an Ambassador Program that is considered an excellent example of community involvement which has resulted in substantial social and economic benefits. In 1992 the EDA introduced an Ambassador program to recognize the contribution made by volunteers for the community. Nominated by a colleague, anyone who boosts the community is eligible to become a 'Leduc Nisku Ambassador'. Installation is done publicly at a Partnership Breakfast, where Ambassadors are introduced and receive a certificate signed by both Mayor and Reeve. In addition, personalized pins and business cards, luggage tags and a license plate for their car are provided. This simple program enables the community to thank citizens who may otherwise be overlooked and is especially useful for recognizing visitors and other dignitaries. Currently, Leduc/ Nisku has over 600 Ambassadors, essentially a huge unpaid sales force promoting the community worldwide. Both the Partnership concept and the Ambassador program have been recognized internationally for their innovation and excellence in delivering community economic development services.

The Ambassador Program promotes the 'International Region' in a unique way by creating extensive word of mouth from reliable sources with firsthand knowledge of the area. The Ambassador Team is a group of local individuals, dedicated to the program, who volunteer their time to provide support and assistance to promote their region and assistance to trade missions.

The Kelowna, BC Chamber of Commerce formed an Ambassador Program as a networking system to learn from each other and exchange ideas and talent. 'Kelowna Business Ambassadors' are a dynamic network of business people in Canada's fastest growing city who have come together to create a high energy exchange of ideas and knowledge that foster personal and professional growth.

<http://www.kelownachamber.org/chamber/ambassadors.aspx>

The Province of Newfoundland and Labrador has an Ambassador Program which is described as 'an active network of ambassadors, spanning the globe and promoting Newfoundland and Labrador, giving direct access to potentially valuable market information and access to an expanded business network in foreign markets.' The province facilitates communications amongst the Ambassadors, the provincial government and the business community. The Ambassadors are individuals who are 'friends' of the province who promote it to the world. Many are ex-patriots.

To support the Ambassadors and to supplement the program, the province produces a bimonthly publication, 'The Ambassador,' which includes supplementary information on the economy and specific sectors are also highlighted as a focus feature. Produced by the Department of Innovation, Trade and Rural Development, The Ambassador Newfoundland and Labrador newsletter highlights many of the innovative companies, exporters and industry success stories dominating the news in Newfoundland and Labrador, and garnering attention around the world. The Province maintains direct contact with Ambassadors on an individual and collective basis as well as through smaller meetings hosted in conjunction with business travel.

Relevance to Frontenac

Throughout the stakeholder engagement program, all Brand Ambassadors were asked their opinion on the current program managed by Frontenac County including suggestions for enhanced features. All Brand Ambassadors were very enthusiastic to be part of the program and were eager to participate at a greater level to grow the tourism and economic opportunities of their area and Frontenac County in general. Most were somewhat unclear of their role, however since this is a new and evolving program,



there was a great deal of anticipation for what the program will mean in the future and what their involvement will be. All Brand Ambassadors were aware of the '#InFrontenac' tagline and appreciate the social media campaign which brings recognition to their business as well as to the County in general. The following comments were gathered from the stakeholders interviewed as well as suggestions from the consulting team and is offered for consideration in future development of Frontenac County's Brand Ambassador Program:

- Frontenac County's role:

Develop a 'catalogue' of Brand Ambassador members which details their talents, experience, areas of interest, time availability etc., and share with all Brand Ambassadors.

- Identify all members with appropriate Brand Ambassador branded materials i.e. pins, licence plates, business cards etc.
- Identify Brand Ambassador businesses with signage, flags, banners etc. to ensure that tourists and visitors will be aware that the designation of a 'Brand Ambassador' means a stopping point where they will receive a Frontenac County 'welcome' and will get tourism information and other information they may need to ensure an interesting and interactive experience in Frontenac County.
- Provide all Brand Ambassadors with current and relevant information on Frontenac County for distribution to their contacts, visitors and customers - both in electronic format for the Brand Ambassador and in printed form in a branded rack card format updated monthly.
- Provide sufficient material and training to inform the Ambassadors on various aspects of life in all areas of Frontenac County including tourism and economic development opportunities.
- Assign members to teams or groups depending on their strengths or interests - examples of these teams include marketing, education, business attraction, agriculture etc., or by sectors of cottage developments, campground developments, culinary/food businesses etc. These members/teams can be called on for various functions for trade events or a familiarization tour.
- Provide networking opportunities on a regular basis (perhaps twice a year) to provide opportunities for members to meet each other, learn of best practices and establish relationships to cross promote and partner on future initiatives and projects.
- Host an annual Brand Ambassador event in a conference format including guest speakers and awards/recognition from the Warden and Mayors of their respective Townships.
- Encourage positive media coverage of the program and celebrate successes.
- Consider enhancement of the Brand Ambassador Program on Frontenac County's website including good news stories, milestones and other items of interest.
- Contact with Brand Ambassadors by the County's program administrator should be frequently including regular visits. It is also recommended that input is requested frequently to continually improve the Brand Ambassador to keep it current and of great interest and pride to its members.
- Provide Brand Ambassadors with access to this study including the tool kit for ease of investment and new business development.



- Frontenac County should develop a strategy to engage residents and create an awareness of the #InFrontenac tagline. While these residents aren't Brand Ambassadors, they are Frontenac ambassadors none the less and should be encouraged to participate through display of the brand via various promotional tools i.e. bumper stickers, pins, buttons, flags etc.
- Work with RTO 9 resources to develop 'visitor tracking' process to determine basic demographics and travel motivators for visitors to Frontenac County. Sites for collection will be determined and the Brand Ambassadors will be responsible to collect and submit the survey data to Frontenac County for their analysis and use in marketing initiatives.

- Brand Ambassador's roles:

- Once identified as a Brand Ambassador 'location', business owners and staff could wear 'Ask Me about #InFrontenac' buttons to encourage questions and dialogue providing an opportunity to promote Frontenac County, its attractions, events and businesses.
- Some businesses indicated an interest in being part of a team to attract new business to Frontenac County. They are keen to increase the inventory of tourism assets and amenities/services in their area and understand the value of cluster and complimentary development to ensure that all businesses maximize their potential and provide the best possible experience for Frontenac County visitors.
- Develop a program for 'peer to peer' and mentorship support for new business development within Frontenac County. Businesses will assist new and lesser experienced business owners who will benefit greatly from having a 'buddy' to assist them in the process of their new business venture.
- Encourage Brand Ambassadors to take advantage of any opportunity to promote tourism or business development to students and youth groups within their Townships. Brand Ambassadors can play an integral role in inspiring young entrepreneurs to stay close to home and develop their future in Frontenac County's many economic development opportunities.
- Brand Ambassadors should be invited to brand their products and services with the tagline #InFrontenac as per Frontenac County's guidelines. This can range from product packaging to collateral material and invoicing forms. The tagline should be seen often and displayed prominently.



Examples of Alternative Accommodations in Other Jurisdictions

Stratford, Ontario

Stratford was reviewed as a best practice, largely due to the number of bed and breakfast establishments within the community. In order to support bed and breakfast owners in the region, the Stratford Tourism Organization markets and communicates the opportunity of running a bed and breakfast within the City, highlighting statistics on income generated and the number of nights per stay. The Stratford Area Bed and Breakfast Association (SABBA), based on a model developed in Niagara Falls, also support bed and breakfast owners, by providing a forum for B&B owners to come together to discuss relevant issues. The SABBA website provides a comprehensive guide for visitors on what is available in Stratford and provides information on current activities for visitors to Stratford. Bed and breakfast owners also indicate their availability on the website, helping both visitors as well as other bed and breakfast owners to book guests when accommodations are full. SABBA provides training sessions for new bed and breakfast owners and sets standards for accreditation, based on bedrooms and bathroom, cleanliness, and breakfast offerings.

The City is also home to the Stratford Chef School, which operates during the off-season of the Shakespeare Festival. In order to find accommodations for its students, the School reached out to a number of B&B operators to house their students. This resulted in the bed and breakfasts remaining open year-round and also provided short-term accommodations for students. It is important to connect local students with learning opportunities, particularly in fields related to eco-tourism and agri-tourism. This will help keep students in the County and help to grow the sector locally. Additionally, opening accommodations to students would bring additional income to farmers or property owners, where applicable, who have extra space while also helping to provide students with more on the job experience, with students and farm owners or accommodation providers working together, transferring skills and knowledge.

Relevance to Frontenac

- The Stratford example illustrates a creative way, albeit on a small scale, to push the tourist season into the shoulder and winter season by partnering with the local chef school.
- Developing a website where accommodation establishments can see which other accommodations have space is one way to ensure that travellers hoping to stay in the County find accommodations.

The Finger Lakes, New York

The Finger Lakes region is seen as a best practice in the organic growth and municipal support for the accommodation sector. The area covers over 9,000 square miles of New York State, including 11 Finger Lakes, parts of Lake Ontario, and sections of the Erie Canal. The area became a tourist destination due to the region's wine production and its Mennonite community. In order to support the tourism sector, wine producers have worked collaboratively to bring awareness to the region as a whole, establishing joint marketing initiatives. The Economic Development Centre (one of 100+ Industrial Development Agencies in the State of New York) provides support through marketing and education to assist in establishing accommodations as well as providing grants and loans at low-interest rates and reinvesting



the returns into other tourism related projects.² For example, one property owner in Penn Yan, a community in the Yates County, Finger Lakes, used the Town's façade improvement program to renovate second-floor apartments in the downtown to be an Airbnb space.

The Chamber of Commerce also supports the tourism industry through its tourism-marketing program, focused on putting "heads in beds" and attracting people to sleep and spend money within the county.³ The Chamber also runs a lodging tax, where half the funds support tourism advertising outside of the area and hosts training programs to teach general customer service for frontline workers in B&Bs and other accommodation offerings.

Additionally, Yates County also offers a Payment In Lieu of Taxes Pilot program, which offers an average percentage of 60% property tax abatement over 10 years on business capital investment or job enabling projects for retail and destination tourism firms.⁴ The Finger Lakes Tourism Alliance website also provides a great deal of information for visitors to the region.⁵ Visitors to the site are provided information on things to do, places to stay, service offerings, and more, using an interactive map highlighting both accommodation options and recreational opportunities.

Accommodations have organically developed in the District based on the high number of tourists, the wineries, the rich agricultural heritage, and the lakes. These experiences have helped to develop alternative accommodations, including farm stays, bed and breakfasts, and vineyard accommodations. Leveraging existing assets, including wineries and farms, has been critical to the creation of a unique vacation destination. Wineries have added accommodations, the most popular of which is the Glenora Winery⁶. Other unique accommodations include The Farm Sanctuary, a farm stay opportunity, where guests stay in cabins or tiny houses, learn about farm animal issues, and connect with rescued animals at the Sanctuary.⁷

The development of new amenities (e.g. wineries and breweries), cultural offerings (e.g. wine trails) and seasonal events help to attract visitors and new accommodation businesses to the area. Building off this, the Finger Lakes Economic Development Centre is actively trying to attract winery investment and accommodation investment while, its county counterparts, the Yates County Chamber of Commerce, helps to develop programs in the region. In discussions with a staff member of the Economic Development Centre, marketing, financial support, and an interactive website were recognized as a key support function offered by the Chamber of Commerce and the County. By not only supporting the creation of accommodations but also the broader, tourism sector, the Finger Lakes is better positioned to attract tourists to a fully developed tourism destination, leveraging existing natural and cultural heritage resources.

Relevance to Frontenac

² New York State Economic Development Council, Industrial Development Agencies. Retrieved from: <http://www.nysedc.org/economic-incentive/industrial-development-agencies/>

³ Yates County Chamber of Commerce (2015) About us. Retrieved from: <http://www.yatesny.com/about>

⁴ Norfolk County (2016)

⁵ Finger Lakes Tourism Alliance (2017), Homepage. Retrieved from: <http://www.fingerlakes.org/>

⁶ Glenora Wine Cellars, Inn. Retrieved from: <http://www.glenora.com/Inn/Accommodations>

⁷ The Farm Sanctuary, Home. Retrieved from: <https://www.farmsanctuary.org/#>



- A similar type of accommodation development could be fostered in Frontenac, catering directly to the tourists who come to the area (e.g. water-based tourism and agri-tourism).
- Finger Lakes Economic Development Centre has recognized the importance of marketing and financial incentives to attract accommodation investments to the region. The incentives and marketing support offered by the Centre and the Tourism Alliance illustrate a model where local government helps to guide short-term accommodations without direct involvement.

The Northwest Farm Stay Website

While it is important to give policy consideration to the development of accommodations, equally important are the marketing and communication considerations. To this end, as the concept of responsible travel and farm stays continue to rise in popularity, websites are increasing being developed to streamline the booking process. A number of online platforms have been developed to support the marketing efforts of on-farm accommodations.⁸ Farm Stays UK,⁹ and the New Zealand Tourism website¹⁰ were investigated as best practices for supporting the online presence of farm stay accommodations.¹¹ The approach to these sites could easily be expanded to include not just farm stays, but a whole range of accommodation options, establishing a single, county-wide online repository of accommodations and booking opportunities. Each website has activities and accommodations broken down by region, helping people to plan the majority of their trip on one site. Additionally, vacationers can also find booking information for accommodations, including the type of accommodation, the price, and the capacity. The sites also link to the accommodation's website, allowing people to book their stay with ease.

Going one step further, the Sustainable Agriculture Research & Education (SARE) helped to fund the development of the Farm Stay U.S. website in 2010, with the assistance of a Western SARE grant. Originally, the website was developed as a resource directory for Oregon, Washington, Idaho, Montana, and California. The project's goals were to create a website that could be scaled for the entire U.S. and to introduce the farm stay option as a value-added operation aimed at improving the financial situation of farms and ranchers unfamiliar with the farm/ranch stay model.¹² Since its creation, the website has since broadened to cover the majority of the U.S. To educate farmers about the model, a number of talks were given, brochures were sent to organizations, and connections were made with large ranching cooperatives.¹³ Interested people were consulted by an existing farm stay owner on an individual basis. In the first year of operations, the website increased from 50 hits per day to as high as 1,800 hits in one

⁸ Any type of accommodation on a working farm, including vineyards, and includes cabins, tiny homes, B&Bs, etc.

⁹ Farm Stay UK (2017), Homepage. Retrieved from: <http://www.farmstay.co.uk/>

¹⁰ New Zealand Tourism (n.d.), Farmstays. Retrieved from: <http://www.newzealand.com/ca/farmstays/>

¹¹ Farm Stay U.S., (2016), retrieved from: <http://www.farmstayus.com/> ; Farm Stays UK, (2014), retrieved from: <http://www.farmstay.co.uk/>; New Zealand Tourism, retrieved from: <http://www.newzealand.com/ca/farmstays/>

¹² SARE (2016), Development of a Northwest Farm Stay Website. Retrieved from: http://mysare.sare.org/sare_project/fw10-029/?page=final&view=print

¹³ SARE (2016)



day. Currently, the site receives between 350-500 daily visitors.¹⁴ The website ranks well on Internet searches and has an established community on Facebook and Twitter.¹⁵ This illustrates the importance of having a single online database of all accommodations within the County.

Following the creation of the website and associated marketing campaign, the States involved saw increased awareness of the opportunities to stay at on farms rather than travelling to more traditional commercial destinations. On farm accommodation resulted in increased revenues for farmers, with income from overnight guests accounted for 10-50+ percent of the farm's income.¹⁶

Building off the success of the SARE Program, the Farm Stay US website developed a Farm Stay Business Guide, including a feasibility workshop, legal and liability considerations, and customer service information and a checklist for people thinking of starting a farm stay.¹⁷

Relevance to Frontenac

- The creation of the “how-to” guide web page and manual helped individuals in the to understand what is needed to develop a farm stay or alternative accommodation with minimal effort on their part, potentially increasing the likelihood of uptake.
- Developing a website which outlines not only the accommodation options in an area but also the activities is well suited for experience based travellers, who are looking for a full range of opportunities in a single area.
- A similar online portal could be developed to support other forms of accommodations across the county, including cottages, campsites, and bed and breakfasts as well as related tourism opportunities (e.g. beaches, marinas, etc.).

Huron-Kinloss

The Township of Huron-Kinloss is within Bruce County, which is located in Western Ontario, on Lake Huron. The Township is relatively remote and remains a primarily rural region of farmland and woodlots. The Cultural Action Plan developed for the Township of Huron-Kinloss in 2013 highlights how all participants in the community engagement process have expressed agriculture and farming as a distinct element of the local culture that links the young and the old, Mennonite and non-Mennonite, different genders, and those engaged in other industries in the community. Local economic development strategies therefore include ways to accommodate tourists while visiting agri-tourism related activities. One way to accommodate this need was to integrate the establishment of bed and breakfasts as a feasible option permitted in the Official Plan of the Township and encouraged in Secondary Plans.

Agriculture is the predominant use of land in the Township of Huron-Kinloss and the protection of such

¹⁴ SARE (2016)

¹⁵ SARE (2016)

¹⁶ SARE (2016)

¹⁷ Farm Stay US (2017), Farm Stay Business Guide. Retrieved from: <http://www.farmstayus.com/for-farms/farm-stay-business-guide>; Farm Stay US (n.d.), Farm Stay Agri-tourism. Retrieved from: <https://www.farmstayus.com/media/50803/farm%20stay%20101%20basics.pdf>



land base is the primary importance for the maintenance of the economic and social fabric of the community. Lands that are designated as Agricultural Areas permit primary agricultural related uses such as growing crops, raising livestock, orchards, forestry, agricultural research, and farm building structures including greenhouses and buildings and related infrastructure. In addition to the primary farm residence, an additional dwelling unit can be created either through an addition or conversion of existing primary farm residence. Secondary related agricultural uses are permitted on Agricultural Areas and include small scale tourist accommodation. This includes the establishments of bed and breakfasts and farm vacation uses on farm parcels provided they are associated with an existing farm operation and are appropriately zoned to regulate the size and scale of the use. Secondary Plans in the Township also reflect the encouragement of establishing bed and breakfasts. This includes promoting the establishment of small scale tourist accommodation the largest urban settlement in the Village of Lucknow Secondary Plan in the Commercial Core Area.

Relevance to Frontenac

- The Huron-Kinloss example illustrates a creative use of land use policy tools to encourage the establishment of bed and breakfasts on non-conventional properties like farms.

Town of Blue Mountains Short Term Accommodation By-Law

Short term accommodation has been a concern for Town of The Blue Mountains residents for a number of years. The Town has received numerous complaints over the years pertaining to residential properties being used for short term stays. Many of these complaints have been identified by neighbouring residents and include: noise issues (including public drunkenness); public disturbances; traffic safety and parking issues (including both on-street and on-lot parking congestion and blocked driveways); number of occupants in buildings; property standards issues; Ontario Fire Code issues; personal safety and security issues (including unknown and transient individuals and trespassing); vandalism to both private and public properties; loss of property values; and sustainability of public costs to the Town of The Blue Mountains and the Ontario Provincial Police for enforcement programs.

Another factor affecting the compatibility of short term accommodation uses is the form of management. A number of operations are strictly controlled by management agencies while others have minimal supervision from absentee landlords. This presents a problem with uneven landowner/lesser enforcement.

In response to these factors, the Town of Blue Mountains introduced a short-term accommodation regulation called the Short Term Accommodation Licensing Program (STA Licensing Program). The regulation applies to buildings or structures or any part thereof that operates or offers a place of temporary residence, lodging or occupancy by way of concession, permit, lease, licence, rental agreement or similar commercial arrangement for any period less than thirty consecutive calendar days, throughout all or any part of a calendar year. The regulation does not include motels, hotels, bed and breakfast establishments, tourist cabins or cottages, commercial resort units, village commercial resort units or similar commercial or institutional uses.

The intent of the regulation is to balance the needs of property owners with those of residents looking for safe, adequate and properly maintained short-term accommodation premises. Under the STA Licensing Program, property owners must apply for and obtain a licence, and renew it bi-annually. The



licence may be suspended or revoked by the Town should the property owner not comply with the provisions of the By-law. If the STA premises is sold, the new owner must apply for a new licence, which includes providing all necessary documentation and having the necessary inspections completed.

The STA Licensing requirement has been very effective in meeting its objectives, including but not limited to:

- Ensuring that STA occupants are provided with safe accommodations in terms of fire, electrical and building safety;
- Ensuring that STA premises are operated and maintained in a sanitary and acceptable levels of interior conditions as per Property Standards;
- Ensuring an enhanced level of care and maintenance of STA premises and requiring STA Operators to maintain records of same;
- Identifying substandard STA premises;
- Ensuring STA Operators are apprised of their responsibilities to comply with Town by-laws and other regulations (public nuisance and noise);
- Protecting the character, amenities and maintain the quality of existing residential neighborhoods; and
- Creating a level playing field for all STA Operators and providing enhanced consumer protection.

Relevance to Frontenac

- The Blue Mountains example showcases that a regulated STA licensing program can create a level playing field for all short-term accommodation operators without impacting traditional forms of accommodation operators include bed and breakfast establishments. The mission of the program is to ensure consumers are provided a proven quality of accommodation experiences during their stay in Town.



Appendix B

Township Profiles



Township of North Frontenac

The following report is a short overview of the County of Frontenac Accommodation Review and Strategy for Growth. The report has specifically been generated to reflect North Frontenac's tourist profiles, current policy considerations, best bets and recommendations.

Tourist Profiles

Understanding what types of accommodations and activities desired by tourists is important to developing and supporting accommodations and the broader tourism sector in the region. The following figure shows that, overall, hotels and motels are the preferred accommodation choices for the tourists who visit the Frontenac region; only 'Nature Lovers' prefer campgrounds.

Figure 1: Profiles of Tourists who Visit the North Frontenac Region

Segment	Definition	Accommodation Choices
Tourist Profiles for those Visiting the North Frontenac Region		
Nature Lovers	<p>Typically, this group is made up of families with children, with a passion for outdoor experiences. Travel is seen as an opportunity about exporting new places, off the beaten path.</p> <p>Typically they have a lower than average travel budget and are happy with the basics (i.e. camping), spending time with their families, and finding opportunities for family bonding and creating new family memories.</p> <p>Preferred activities include hiking, beaches, canoeing, parks and fishing.</p> <p>42% rely on family and friends for travel tips.</p> <p>78% use the internet to plan, including accommodation sites, online travel agencies and destination sites.</p>	<ul style="list-style-type: none">▪ 32% serviced campground/ trailer park▪ 26% hotels▪ 19% family/friends▪ 11% unserviced campgrounds
Connected Explorers	<p>Typically, this group is under 40 years old, both with and without children. This group is characterized as a confident and youthful and are an optimistic group with a need to travel and to expose themselves to new experiences as well as expand their horizons.</p> <p>Typically they look for a fully packed schedule of activities, using the internet to research, book, plan and share their travel experiences.</p> <p>Preferred activities include visiting museums, galleries, shopping, parks, landmarks, culinary, spa and beaches.</p> <p>They like to do what the locals are doing (e.g. events, restaurants, attractions).</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">▪ 57% hotel/boutique hotel▪ 21% family/friends▪ 14% motel▪ 9% inn/bed and breakfast



Segment	Definition	Accommodation Choices
Outgoing Mature Couples	<p>Typically, this group is made up of older, retired couples aged 55+ with below average income. Travel is seen as an opportunity to enjoy the company of others, and socializing with fellow travellers as well as locals.</p> <p>Typically for this group, travel is seen as an opportunity to stay active and relax rather than adventure or exploration of new cultures.</p> <p>31% believe socializing and meeting new people (travellers and locals) is one of the greatest benefits of travelling.</p> <p>77% enjoy group tours because they can sightsee in vibrant cities, visit museums, galleries, landmarks and gardens.</p> <p>Enjoys culinary experiences (40%), beaches/resorts (43%) and natural wonders (30%).</p> <p>Plans vacations using word of mouth recommendations, printed materials and online sources including accommodations websites to a lesser extent.</p>	<ul style="list-style-type: none">30% hotel/boutique hotel28% motels25% family/friends8% rental cottages

Source: TNS, Reference Report- Accommodations in Ontario (2012), TNS, Tourist Segments (n.d.)

Current Policy Considerations

Official Plan Considerations

The following table highlights the key accommodation related policies found in the Township Official Plan.

Figure 2: Official Plan Policy Implications for Accommodation Development

North Frontenac Official Plan
Section 4.6 Rural Recreational and Conservation Uses Allow For Camp-Cabin Type Accommodations <ul style="list-style-type: none">A camp (recreational based camp) may be permitted under a land use permit with the Crown or as a remote use on private land, provided that appropriate arrangements are made for on-site servicing. The requirements for frontage on a road may be waived.
Section 4.7 Rural Commercial Uses Are Geared Towards Tourism and Accommodation Development <ul style="list-style-type: none">Commercial uses shall include a range of commercial facilities that principally serve the tourist trade, such as lodging facilities, motels and resorts, recreation facilities, golf courses, parks and facilities related to boat traffic, such as marinas, docks and other services. Buildings or other items of historic interest, and institutional uses (such as museums and related facilities), shall also be permitted. However, limitations exist for tenured housing that is oriented to short-term or seasonal occupancy (i.e. condominiums, fractional ownership, and timesharing facilities).



North Frontenac Official Plan

Section 4.8 Recreational Vehicles And Recreational Vehicle Parks And Campgrounds Are Limited To Seasonal Commercial Operations But Can Provide Short-Term Occupancy During The Winter Months For Select Days

- It is expected that these parks would be operated on a seasonal basis, e.g., May - October and closed during the winter months. The Plan allows for the over wintering or storage of recreational vehicles in these parks. Recreational Vehicle Parks shall for the purposes of this Plan, be understood to include a campground for tents. Notwithstanding the provisions of this clause, short-term occupancy of recreational vehicles during the period November will be permitted. Short-term occupancy may pertain, but is not limited to, weekends, Christmas and New Year's holidays and school breaks. Short-term occupancy during this period shall not exceed 10 days per calendar month.

Frontenac County Official Plan

Section 2.0 – Support Economic Sustainability Across the Region

- This includes, but is not limited to, the development of golf courses, resorts, campgrounds, trailer parks, marinas, tourist accommodation facilities, museums, historical and scenic tours and heritage sites as elements of a successful tourism economy. The maintenance and use of lakes and rivers in Frontenac also play a significant role in providing opportunities for tourism and leisure activities. To succeed, Frontenac County will need to work with its member municipalities, the Province, Frontenac Community Futures Development Corporation, City of Kingston, and various tourism agencies and organizations to promote tourism activity.

Section 3.3 - Rural Lands Provide Tourism Opportunities

- This includes the promotion of the tourism economy across the Frontenac region by ensuring suitable lands are available to satisfy demands for tourism and tourism related development. To encourage economic diversification in rural lands is to include a greater flexibility for on-farm activities, home-based businesses and agri-tourism, and new small scale industrial-type ventures that are connected to the farm economy such as milk processing, cheese factories and craft breweries.

Special Policies – Rural Waterfront Areas

- To permit shore land development that allows for sustainable growth of existing and new tourist developments and innovative and appropriately designed new residential developments.

Section 4.1 Trail Development and Scenic Routes as a Priority

- Frontenac County's location and scenic assets provide ample opportunities for creating scenic or heritage routes. These routes draw both local residents and tourists to the scenic areas of the County. Cycle tourism can benefit the economy of businesses across the Frontenac region.



Community Improvement Plan

The following table highlights the key accommodation related policies found in the Community Improvement Plan.

Figure 3: Community Improvement Plan Policies for North Frontenac

Program	North Frontenac CIP
Community Improvement Loan Program: Preferential financing for eligible projects, approved under the Grant Programs but excludes the Municipal Fees Grant Program.	Not Applicable
Facade Improvement Program: Intended to improve the appearance of commercial and residential buildings in order to improve the overall aesthetics and character of the community.	A onetime grant of 50% to a maximum of eligible project costs in order to improve commercial building features. The maximum grant per property is \$2,500
Accessibility Enhancement: Encourage commercial property owners to retrofit entranceways and other access points to ensure facilities and commercial outlets are accessible to all members of the community.	A onetime grant of 50% to a maximum of eligible project costs in order to improve accessibility for commercial properties. The maximum grant per property of \$2,500
Municipal Fees Grant Program: Intended to reduce the costs of development and/or rehabilitation of existing buildings that contribute to the quality of the community.	A onetime grant equal to the total application costs or \$2,000, whichever is the lesser.
Commercial Space Conversion: Support new businesses looking to locate in the village core and also provides some funds to existing residential properties along Highway 96 for conversion into new businesses to increase the overall business activity within the village area.	A onetime grant of 50% to a maximum of eligible project costs for projects that increase commercial building stock within the CIP area. The maximum grant per property of \$2,500

Best Bets

Based on the findings from the engagement and research phases, the following five opportunities were identified as 'best bet' areas that can support North Frontenac's tourism industry:

1. Bed and Breakfast Accommodations
2. Redevelopment of Existing Cottage Accommodations
3. Pod-Based Accommodations
4. Upscale Camping and Campground Accommodations
5. Niche Resort Accommodations



Recommendations

The following recommendations identify key goals for investment opportunities with regards to accommodation development. Each recommendation includes specific tactics, activities, and timeframes. However, more importantly, it sets a critical path for Township staff to follow.

#	Action	Timing (Years)			Budget Allocation
		0-1	1-2	3+	
Critical Path 1 Establish and strengthen relationships required to pursue investment in the tourism and accommodation industry					
1	▪ Connect with the County to set up a steering committee to provide direction on rolling out this strategy and act as the primary connection to accommodation development in the community.				Staff Time
2	▪ Connect with the County how it can support its tourism industry, including accommodation operators.				Staff Time
3	▪ Assist the County in creating a small network of committed local realtors.				Staff Time
Critical Path 2 Pursue sophisticated marketing and sales tactics that will generate leads, turn them into prospects, and attract investment					
4	▪ Work with the County to distribute toolkits to encourage the development or redevelopment of accommodation properties. <ul style="list-style-type: none">▪ Any future toolkit should identify the value proposition of the accommodation opportunity and the key criteria for success.▪ Promote and distribute the toolkits to existing operators and new investors, illustrating the investment that has been made towards the growth of these opportunities.▪ Customize resource contacts for each toolkit (specific to each municipality).				Provided with strategy Staff Time
Critical Path 3 Establish and invest in infrastructure, land use policies and improvement programs to ensure Frontenac is a competitive investment destination					
5	▪ Connect with the County and work with local and regional planning and development departments to review land-use policies in regards to potential accommodation opportunities.				Staff Time
6	▪ Connect with the County and work with local and regional planning and development departments to develop resource guides that encourage existing accommodation operators and assist future investors in navigating permits, incentive programs and approval processes.				Staff Time



#	Action	Timing (Years)	Budget
7	<ul style="list-style-type: none">▪ Connect with the County and work with local and regional planning and development departments to introduce an Accommodation Grant/Loan Program as part of community improvement plans.		Staff Time

Recommendations for Best Bet Opportunities

#	Recommendation
Recommendations for all opportunities	
1	Host workshops (in conjunction with the County and other Townships) to educate existing and potential owners on the opportunities associated with developing short-term accommodations. Include a resource guide on how individuals can get started.
2	Expand, where applicable, the Community Improvement Plan definition and programs to include short-term and seasonal accommodations.
3	Leverage industry newsletters and websites to inform potential investors/entrepreneurs of available accommodation properties across the Frontenac region.
Opportunity One: Bed and Breakfast Accommodations	
4	Work with the Brand Ambassadors to include testimonials on the website and manuals which showcase traditional and unique bed and breakfast accommodation operators. Leverage testimonials to create a list that can be promoted and used in materials.
5	Propose policy amendments to local official plans to encourage (if applicable) (See Appendix A for examples): <ul style="list-style-type: none">▪ The development of bed and breakfasts on a variety of land uses including rural farmland, rural areas, urban cores or downtowns▪ The recognition of bed and breakfasts as commercial establishments eliminating the need of a property landlord to be living on premise.▪ The introduction of restrictions on short-term rental units that operate in a secondary dwelling or a residential unit outside of the main dwelling. For example, an individual owning a residential unit or secondary dwelling should not be allowed to promote and rent a bedroom or living quarter for five or less days to a visitor unless they are a registered commercial operation.
Opportunity Two: Redevelopment of Existing Cottage Accommodations	
6	Frontenac CFDC's strategic plan has identified upgrades to tourism accommodations as a focus area for continued investment. Working with the CFDC, promote the services and workshops offered by the CFDC to existing cottage rental owners.
7	Remain firm on maintaining commercial zoning when under pressure from residential developers.
Opportunity Three: Pod-Based Accommodations	
8	Invest and encourage in the development of pod accommodations alongside K&P and Cataraqui trailheads to support a growing market. Investigate if funds for pod development are available from the Province's Tourism Development Fund as an element of its Cycling Tourism Plan.



#	Recommendation
9	<p>Propose policy amendments to local Official Plans to include (if applicable):</p> <ul style="list-style-type: none">▪ Pod-developments as a form of short-term rental▪ Pod-developments to be an allowed use on properties adjacent to trailheads, existing campgrounds and in rural areas.▪ Allow the placement of pods on community facility property such as churches, parks, and libraries
Opportunity Four: Upscale Camping and Campground Accommodations	
10	Work with existing campgrounds and the CFDC to encourage the introduction of signature upscale camping products and experiences into the Frontenac region.
Opportunity Five: Niche Resort Accommodations	
11	Develop a short list of farm-based assets that could support the development of farm stay experiences across the region.
12	Host workshops (in conjunction with the County and other Townships) to educate farmers, home owners and seasonal cottage/cabin owners on the opportunities associated with developing niche accommodations on their properties.



Township of Central Frontenac

The following report is a short overview of the County of Frontenac Accommodation Review and Strategy for Growth. The report has specifically been generated to reflect Central Frontenac's tourist profiles, current policy considerations, best bets and recommendations.

Tourist Profiles

Understanding what types of accommodations and activities desired by tourists is important to developing and supporting accommodations and the broader tourism sector in the region. The following figure shows that, overall, hotels and motels are the preferred accommodation choices for the tourists who visit the Frontenac region; only 'Nature Lovers' prefer campgrounds.

Figure 1: Profiles of Tourists who Visit the Central Frontenac Region

Segment	Definition	Accommodation Choices
Tourist Profiles for those Visiting the Central Frontenac Region		
Nature Lovers	<p>Typically, this group is made up of families with children, with a passion for outdoor experiences. Travel is seen as an opportunity about exporting new places, off the beaten path.</p> <p>Typically they have a lower than average travel budget and are happy with the basics (i.e. camping), spending time with their families, and finding opportunities for family bonding and creating new family memories.</p> <p>Preferred activities include hiking, beaches, canoeing, parks and fishing.</p> <p>42% rely on family and friends for travel tips.</p> <p>78% use the internet to plan, including accommodation sites, online travel agencies and destination sites.</p>	<ul style="list-style-type: none">32% serviced campground/ trailer park26% hotels19% family/friends11% unserviced campgrounds
Connected Explorers	<p>Typically, this group is under 40 years old, both with and without children. This group is characterized as a confident and youthful and are an optimistic group with a need to travel and to expose themselves to new experiences as well as expand their horizons.</p> <p>Typically they look for a fully packed schedule of activities, using the internet to research, book, plan and share their travel experiences.</p> <p>Preferred activities include visiting museums, galleries, shopping, parks, landmarks, culinary, spa and beaches.</p> <p>They like to do what the locals are doing (e.g. events, restaurants, attractions).</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">57% hotel/boutique hotel21% family/friends14% motel9% inn/bed and breakfast



Segment	Definition	Accommodation Choices
Outgoing Mature Couples	<p>Typically, this group is made up of older, retired couples aged 55+ with below average income. Travel is seen as an opportunity to enjoy the company of others, and socializing with fellow travellers as well as locals.</p> <p>Typically for this group, travel is seen as an opportunity to stay active and relax rather than adventure or exploration of new cultures.</p> <p>31% believe socializing and meeting new people (travellers and locals) is one of the greatest benefits of travelling.</p> <p>77% enjoy group tours because they can sightsee in vibrant cities, visit museums, galleries, landmarks and gardens.</p> <p>Enjoys culinary experiences (40%), beaches/resorts (43%) and natural wonders (30%).</p> <p>Plans vacations using word of mouth recommendations, printed materials and online sources including accommodations websites to a lesser extent.</p>	<ul style="list-style-type: none">30% hotel/boutique hotel28% motels25% family/friends8% rental cottages

Source: TNS, Reference Report- Accommodations in Ontario (2012), TNS, Tourist Segments (n.d.)

Current Policy Considerations

Official Plan Considerations

The following table highlights the key accommodation related policies found in the Township Official Plan.

Figure 2: Official Plan Policy Implications for Accommodation Development

Central Frontenac Official Plan
<p>Section 3.5.1 Residential Districts Allow For Tourism Related Commercial Uses</p> <ul style="list-style-type: none">Commercial uses such as convenience stores which serve the day-to-day needs of residents or uses which cater to the tourist industry (e.g. antique store, craft shop, restaurant, bed and breakfast and professional offices through the conversion of residential dwellings). In Hamlets or Cross Road communities, commercial uses may also include small-scale retail outlets and personal service uses.
<p>Section 3.8 Rural Area – Accommodation Based Development Is Permitted In Areas Zoned Recreational Commercial Use</p> <ul style="list-style-type: none">In areas designated Rural on Schedules 'A1 - A4', the Land Use Plan permits recreational commercial uses that can include uses and services which meet the needs of rural residents or which are oriented to the vacationing public or which are leisure or recreation oriented (such as campgrounds, lodging, marinas, golf courses, outdoor recreation, automotive uses, eateries).



Central Frontenac Official Plan

Section 3.6.2 Rural Area – Residential Units in Rural Areas Allow For Accommodations As An Accessory Use

- Accessory uses may include a home based business, a bed and breakfast establishment and a garden suite.

Section 3.6.3 Rural Area -Waterfront Units in Rural Areas Permit The Use Of Seasonal and Permanent Accommodation Uses

- Permitted uses within the Waterfront District Designation include seasonal and permanent residential and recreational commercial uses such as campgrounds, recreational vehicle parks, marinas, tourist lodges, golf courses and restaurants.

Frontenac County Official Plan

Section 2.0 – Support Economic Sustainability Across the Region

- This includes, but is not limited to, the development of golf courses, resorts, campgrounds, trailer parks, marinas, tourist accommodation facilities, museums, historical and scenic tours and heritage sites as elements of a successful tourism economy. The maintenance and use of lakes and rivers in Frontenac also play a significant role in providing opportunities for tourism and leisure activities.

To succeed, Frontenac County will need to work with its member municipalities, the Province, Frontenac Community Futures Development Corporation, City of Kingston, and various tourism agencies and organizations to promote tourism activity.

Section 3.3 - Rural Lands Provide Tourism Opportunities

- This includes the promotion of the tourism economy across the Frontenac region by ensuring suitable lands are available to satisfy demands for tourism and tourism related development. To encourage economic diversification in rural lands is to include a greater flexibility for on-farm activities, home-based businesses and agri-tourism, and new small scale industrial-type ventures that are connected to the farm economy such as milk processing, cheese factories and craft breweries.

Special Policies – Rural Waterfront Areas

- To permit shore land development that allows for sustainable growth of existing and new tourist developments and innovative and appropriately designed new residential developments.

Section 4.1 Trail Development and Scenic Routes as a Priority

- Frontenac County's location and scenic assets provide ample opportunities for creating scenic or heritage routes. These routes draw both local residents and tourists to the scenic areas of the County. Cycle tourism can benefit the economy of businesses across the Frontenac region.



Community Improvement Plan

The following table highlights the key accommodation related policies found in the Community Improvement Plan.

Figure 3: Community Improvement Plan Policies for North Frontenac

Program	Sharbot Lake CIP
Community Improvement Loan Program: Preferential financing for eligible projects, approved under the Grant Programs but excludes the Municipal Fees Grant Program.	An interest free loan to a maximum of \$7,500 amortized over five years is available to assist property owners in addition to the grant programs.
Facade Improvement Program: Intended to improve the appearance of commercial and residential buildings in order to improve the overall aesthetics and character of the community.	A onetime grant of 50% to a maximum of \$3,000 of eligible project costs in order to improve commercial building features
Accessibility Enhancement: Encourage commercial property owners to retrofit entranceways and other access points to ensure facilities and commercial outlets are accessible to all members of the community.	A onetime grant of 50% to a maximum of \$2,500 of eligible project costs in order to improve accessibility for commercial properties
Municipal Fees Grant Program: Intended to reduce the costs of development and/or rehabilitation of existing buildings that contribute to the quality of the community.	A onetime grant equal to the total application costs or \$2000, whichever is the lesser. Application fees must be for improvement projects that qualify for other programs.
Commercial Space Conversion: Support new businesses looking to locate in the village core and also provides some funds to existing residential properties along Highway 96 for conversion into new businesses to increase the overall business activity within the village area.	Not Applicable
Other Community Specific Programs	
<ul style="list-style-type: none">Central Frontenac Sharbot Lake CIP- Business Start-up Funding: Funding is available to help new businesses looking to locate in the village core or the Highway 7 corridor. Some existing residential properties along Road 38 may also be desirable for conversion into new businesses to increase the overall business activity within the village area and bridge the gaps between the Elizabeth Street and Highway 7/38 commercial areas. The program provides financial assistance for projects creating new commercial/employment opportunities within existing buildings or through additions.	
A onetime grant of 50% to a maximum of \$2,500 of eligible project costs for projects that increase commercial building stock within the CIP area.	



Best Bets

Based on the findings from the engagement and research phases, the following five opportunities were identified as 'best bet' areas that can support Central Frontenac's tourism industry:

1. Bed and Breakfast Accommodations
2. Redevelopment of Existing Cottage Accommodations
3. Pod-Based Accommodations
4. Upscale Camping and Campground Accommodations
5. Niche Resort Accommodations

Recommendations

The following recommendations identify key goals for investment opportunities with regards to accommodation development. Each recommendation includes specific tactics, activities, and timeframes. However, more importantly, it sets a critical path for Township staff to follow.

#	Action	Timing (Years)			Budget Allocation
		0-1	1-2	3+	
Critical Path 1 Establish and strengthen relationships required to pursue investment in the tourism and accommodation industry					
1	▪ Connect with the County to set up a steering committee to provide direction on rolling out this strategy and act as the primary connection to accommodation development in the community.				Staff Time
2	▪ Connect with the County how it can support its tourism industry, including accommodation operators.				Staff Time
3	▪ Assist the County in creating a small network of committed local realtors.				Staff Time
Critical Path 2 Pursue sophisticated marketing and sales tactics that will generate leads, turn them into prospects, and attract investment					
4	▪ Work with the County to distribute toolkits to encourage the development or redevelopment of accommodation properties. <ul style="list-style-type: none">▪ Any future toolkit should identify the value proposition of the accommodation opportunity and the key criteria for success.▪ Promote and distribute the toolkits to existing operators and new investors, illustrating the investment that has been made towards the growth of these opportunities.▪ Customize resource contacts for each toolkit (specific to each municipality).				Provided with strategy Staff Time



#	Action	Timing (Years)	Budget
Critical Path 3 Establish and invest in infrastructure, land use policies and improvement programs to ensure Frontenac is a competitive investment destination			
5	<ul style="list-style-type: none">▪ Connect with the County and work with local and regional planning and development departments to review land-use policies in regards to potential accommodation opportunities.		Staff Time
6	<ul style="list-style-type: none">▪ Connect with the County and work with local and regional planning and development departments to develop resource guides that encourage existing accommodation operators and assist future investors in navigating permits, incentive programs and approval processes.		Staff Time
7	<ul style="list-style-type: none">▪ Connect with the County and work with local and regional planning and development departments to introduce an Accommodation Grant/Loan Program as part of community improvement plans.		Staff Time

Recommendations for Best Bet Opportunities

#	Recommendation
Recommendations for all opportunities	
1	Host workshops (in conjunction with the County and other Townships) to educate existing and potential owners on the opportunities associated with developing short-term accommodations. Include a resource guide on how individuals can get started.
2	Expand, where applicable, the Community Improvement Plan definition and programs to include short-term and seasonal accommodations.
3	Leverage industry newsletters and websites to inform potential investors/entrepreneurs of available accommodation properties across the Frontenac region.
Opportunity One: Bed and Breakfast Accommodations	
4	Work with the Brand Ambassadors to include testimonials on the website and manuals which showcase traditional and unique bed and breakfast accommodation operators. Leverage testimonials to create a list that can be promoted and used in materials.
5	Propose policy amendments to local official plans to encourage (if applicable) (See Appendix A for examples): <ul style="list-style-type: none">▪ The development of bed and breakfasts on a variety of land uses including rural farmland, rural areas, urban cores or downtowns▪ The recognition of bed and breakfasts as commercial establishments eliminating the need of a property landlord to be living on premise.▪ The introduction of restrictions on short-term rental units that operate in a secondary dwelling or a residential unit outside of the main dwelling. For example, an individual owning a residential unit or secondary dwelling should not be allowed to promote and rent a bedroom or living quarter for five or less days to a visitor unless they are a registered commercial operation.



#	Recommendation
Opportunity Two: Redevelopment of Existing Cottage Accommodations	
6	Frontenac CFDC's strategic plan has identified upgrades to tourism accommodations as a focus area for continued investment. Working with the CFDC, promote the services and workshops offered by the CFDC to existing cottage rental owners.
7	Remain firm on maintaining commercial zoning when under pressure from residential developers.
Opportunity Three: Pod-Based Accommodations	
8	<p>Propose policy amendments to local Official Plans to include (if applicable):</p> <ul style="list-style-type: none">▪ Pod-developments as a form of short-term rental▪ Pod-developments to be an allowed use on properties adjacent to trailheads, existing campgrounds and in rural areas.▪ Allow the placement of pods on community facility property such as churches, parks, and libraries
9	Invest and encourage in the development of pod accommodations alongside K&P and Cataraqui trailheads to support a growing market. Investigate if funds for pod development are available from the Province's Tourism Development Fund as an element of its Cycling Tourism Plan.
Opportunity Four: Upscale Camping and Campground Accommodations	
10	Work with existing campgrounds and the CFDC to encourage the introduction of signature upscale camping products and experiences into the Frontenac region.
Opportunity Five: Niche Resort Accommodations	
11	Develop a short list of farm-based assets that could support the development of farm stay experiences across the region.
12	Host workshops (in conjunction with the County and other Townships) to educate farmers, home owners and seasonal cottage/cabin owners on the opportunities associated with developing niche accommodations on their properties.



Township of South Frontenac

The following report is a short overview of the County of Frontenac Accommodation Review and Strategy for Growth. The report has specifically been generated to reflect South Frontenac's tourist profiles, current policy considerations, best bets and recommendations.

Tourist Profiles

Understanding what types of accommodations and activities desired by tourists is important to developing and supporting accommodations and the broader tourism sector in the region. The following figure shows that, overall, hotels and motels are the preferred accommodation choices for the tourists who visit the Frontenac region; only 'Nature Lovers' prefer campgrounds.

Figure 1: Profiles of Tourists who Visit the South Frontenac Region

Segment	Definition	Accommodation Choices
Tourist Profiles for those Visiting the South Frontenac Region		
Nature Lovers	<p>Typically, this group is made up of families with children, with a passion for outdoor experiences. Travel is seen as an opportunity about exporting new places, off the beaten path.</p> <p>Typically they have a lower than average travel budget and are happy with the basics (i.e. camping), spending time with their families, and finding opportunities for family bonding and creating new family memories.</p> <p>Preferred activities include hiking, beaches, canoeing, parks and fishing.</p> <p>42% rely on family and friends for travel tips.</p> <p>78% use the internet to plan, including accommodation sites, online travel agencies and destination sites.</p>	<ul style="list-style-type: none">32% serviced campground/ trailer park26% hotels19% family/friends11% unserviced campgrounds
Connected Explorers	<p>Typically, this group is under 40 years old, both with and without children. This group is characterized as a confident and youthful and are an optimistic group with a need to travel and to expose themselves to new experiences as well as expand their horizons.</p> <p>Typically they look for a fully packed schedule of activities, using the internet to research, book, plan and share their travel experiences.</p> <p>Preferred activities include visiting museums, galleries, shopping, parks, landmarks, culinary, spa and beaches.</p> <p>They like to do what the locals are doing (e.g. events, restaurants, attractions).</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">57% hotel/boutique hotel21% family/friends14% motel9% inn/bed and breakfast



Segment	Definition	Accommodation Choices
Additional Tourist Profiles for those visiting South Frontenac and Frontenac Islands		
Up and Coming Explorers	<p>Typically, this group are young families, aged 18-34 with children and have diverse backgrounds, including visible minorities (45%) and immigrants (40%).</p> <p>This group is recently affluent and emerging into a new life phase that includes fresh experiences such as travel. Travel is seen as an opportunity to learn and explore as a nuclear family. Typically this group starts with tourist destinations nearby and visits areas typically considered to have core tourist attractions.</p> <p>Typically rely heavily on the internet to plan trips including accommodation websites and online travel agents.</p> <p>57% visit attractions such as amusement parks/zoo/aquariums.</p> <p>70% plan trips around the world's most famous sites.</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">45% hotel/boutique hotel23% friends/family22% motels10% resorts
Sports Lovers	<p>Typically, this group is middle-aged men, aged 35-54. They are enthusiastic about sports and see themselves as more active than typical travellers, although, in reality, they look for rest and relaxation more than other groups.</p> <p>Typically, they are looking for organized sports and golf.</p> <p>50% attend sporting events and 37% say it is their main reason to travel.</p> <p>47% take part in sports while travelling.</p> <p>16% played golf on their most recent trip.</p> <p>38% rely on family friends for travel planning, 22% use their own experience, 15% use brochures and 11% use associations.</p>	<ul style="list-style-type: none">55% hotel/boutique hotel19% family/friends11% motels7% resorts
Family Memory Builders	<p>Typically, this group is made up of couples with young children, aged 35-54. They have built their lives around their children and are looking for tourism experiences that allow them to spend time as a family.</p> <p>45% visited amusement parks, theme parks, zoos, aquariums.</p> <p>54% went shopping and 42% visited a beach.</p> <p>77% want to connect with family on vacation and create lasting memories as a family.</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">51% hotel/boutique hotel27% family/friends13% motels8% resorts

Source: TNS, Reference Report- Accommodations in Ontario (2012), TNS, Tourist Segments (n.d.)



Current Policy Considerations

Official Plan Considerations

The following table highlights the key accommodation related policies found in the Township Official Plan.

Figure 2: Official Plan Policy Implications for Accommodation Development

South Frontenac Official Plan
Section 5.6.1 Residential Policies Allow For Bed and Breakfast Related Uses <ul style="list-style-type: none">The uses permitted shall include single detached dwellings; semi-detached or duplex dwellings, multiple unit dwellings, single detached dwellings converted to multiple unit dwellings; group homes established in accordance with the provisions of Section 6.5, bed and breakfasts and home occupations.
Section 5.6.3 Commercial Policies Allow For Roofed Accommodation Uses <ul style="list-style-type: none">The uses permitted include those commercial establishments offering goods and services which serve the residents of the Settlement Areas or the market area as a whole such as retail commercial establishments, personal service shops, recreational uses, motels and hotels, tourist homes, and other.
Section 5.7 Rural Designated Land Policies Limit Accommodation Development <ul style="list-style-type: none">The predominant use of land in the Rural designation shall be for agricultural; aquaculture; open space; conservation; limited service residential; recreational; community facility and rurally oriented non-farm residential; group homes established in accordance with the provisions of Section 6.5; commercial and industrial and bed and breakfast and home occupation uses.Recreational and resort commercial uses shall include tent and trailer parks; resorts, including privately managed lodges; health spas; tourist accommodations such as cabins, motels and hotels; marinas. Bed and breakfast operations are not considered recreational and resort commercial uses but as a home occupation in accordance with the provision of the implementing zoning by-law.Highway commercial uses shall include; motels; hotels; taverns; restaurants; convenience retail stores and similar uses. Tent and trailer parks shall include seasonally operated parks for tents and recreational vehicles, not including mobile homes together with accessory facilities such as an accessory dwelling, docks, and convenience stores catering to the day-to-day needs of the visitors. The minimum lot area for tent and trailer parks shall be 4 ha (10 acres); the maximum number of campsites should be 50 in order to avoid excessive concentrations of development in waterfront areas.No campsite, building or structure except a marine facility for launching and/or servicing of boats or a water pumphouse is permitted within 50 metres (164 feet) of the high water mark of any water body.Motels, hotels, rental cabins or other roofed accommodation, including accessory facilities such as docks, eating establishments, and convenience stores shall have a minimum lot area of 2 ha (5



South Frontenac Official Plan

acres). The maximum density shall be one unit per 2,000 m² (½ acre) to a maximum of 50 units, provided the appropriate authority will approve of the sewage disposal systems which are used.

Frontenac County Official Plan

Section 2.0 – Support Economic Sustainability Across the Region

- This includes, but is not limited to, the development of golf courses, resorts, campgrounds, trailer parks, marinas, tourist accommodation facilities, museums, historical and scenic tours and heritage sites as elements of a successful tourism economy. The maintenance and use of lakes and rivers in Frontenac also play a significant role in providing opportunities for tourism and leisure activities.

To succeed, Frontenac County will need to work with its member municipalities, the Province, Frontenac Community Futures Development Corporation, City of Kingston, and various tourism agencies and organizations to promote tourism activity.

Section 3.3 - Rural Lands Provide Tourism Opportunities

- This includes the promotion of the tourism economy across the Frontenac region by ensuring suitable lands are available to satisfy demands for tourism and tourism related development. To encourage economic diversification in rural lands is to include a greater flexibility for on-farm activities, home-based businesses and agri-tourism, and new small scale industrial-type ventures that are connected to the farm economy such as milk processing, cheese factories and craft breweries.

Special Policies – Rural Waterfront Areas

- To permit shore land development that allows for sustainable growth of existing and new tourist developments and innovative and appropriately designed new residential developments.

Section 4.1 Trail Development and Scenic Routes as a Priority

- Frontenac County's location and scenic assets provide ample opportunities for creating scenic or heritage routes. These routes draw both local residents and tourists to the scenic areas of the County. Cycle tourism can benefit the economy of businesses across the Frontenac region.

Community Improvement Plan

The following table highlights the key accommodation related policies found in the Community Improvement Plan.

Figure 3: Community Improvement Plan Policies for North Frontenac

Program	Harrowsmith CIP
Community Improvement Loan Program: Preferential financing for eligible projects, approved under the Grant Programs but excludes the Municipal Fees Grant Program.	An interest free loan to a maximum of \$7,500 amortized over five years is available to assist property owners in addition to the grant programs.



Program	Harrowsmith CIP
Façade Improvement Program: Intended to improve the appearance of commercial and residential buildings in order to improve the overall aesthetics and character of the community.	A onetime grant of 50% to a maximum of \$2,000 for residential or \$3,500 for commercial of eligible project costs in order to improve exterior building features. Residential projects must front onto Road 38, Harrowsmith Road or Colebrook Road Commercial projects must be for properties zoned commercial.
Accessibility Enhancement: Encourage commercial property owners to retrofit entranceways and other access points to ensure facilities and commercial outlets are accessible to all members of the community.	A onetime grant of 50% to a maximum of \$3,500 of eligible project costs for projects that improve the commercial building stock within the CIP area. The intent of this program is complement the Façade Improvement Program noted above but specifically tailored to businesses.
Municipal Fees Grant Program: Intended to reduce the costs of development and/or rehabilitation of existing buildings that contribute to the quality of the community.	A onetime grant equal to the total application costs or \$2000, whichever is the lesser. Application fees must be for improvement projects for commercial or residential properties fronting onto Road 38, Harrowsmith Road or Colebrook Road
Commercial Space Conversion: Support new businesses looking to locate in the village core and also provides some funds to existing residential properties along Highway 96 for conversion into new businesses to increase the overall business activity within the village area.	Not Applicable
Other Community Specific Programs	
<ul style="list-style-type: none">South Frontenac Harrowsmith CIP- Commercial Building Improvement Grant: seeks to restore the existing building stock and relates to projects that are beyond basic Façade Improvement and are focused inside the commercial unit. A onetime grant of 50% to a maximum of \$3,500 of eligible project costs for projects that improve the commercial building stock within the CIP area. The intent of this program is complement the Façade Improvement Program noted above but specifically tailored to businesses.	

Best Bets

Based on the findings from the engagement and research phases, the following five opportunities were identified as 'best bet' areas that can support South Frontenac's tourism industry:

1. Bed and Breakfast Accommodations
2. Redevelopment of Existing Cottage Accommodations
3. Pod-Based Accommodations
4. Upscale Camping and Campground Accommodations
5. Niche Resort Accommodations



Recommendations

The following recommendations identify key goals for investment opportunities with regards to accommodation development. Each recommendation includes specific tactics, activities, and timeframes. However, more importantly, it sets a critical path for Township staff to follow.

#	Action	Timing (Years)			Budget Allocation
		0-1	1-2	3+	
Critical Path 1 Establish and strengthen relationships required to pursue investment in the tourism and accommodation industry					
1	▪ Connect with the County to set up a steering committee to provide direction on rolling out this strategy and act as the primary connection to accommodation development in the community.				Staff Time
2	▪ Connect with the County how it can support its tourism industry, including accommodation operators.				Staff Time
3	▪ Assist the County in creating a small network of committed local realtors.				Staff Time
Critical Path 2 Pursue sophisticated marketing and sales tactics that will generate leads, turn them into prospects, and attract investment					
4	▪ Work with the County to distribute toolkits to encourage the development or redevelopment of accommodation properties. <ul style="list-style-type: none">▪ Any future toolkit should identify the value proposition of the accommodation opportunity and the key criteria for success.▪ Promote and distribute the toolkits to existing operators and new investors, illustrating the investment that has been made towards the growth of these opportunities.▪ Customize resource contacts for each toolkit (specific to each municipality).				Provided with strategy Staff Time
Critical Path 3 Establish and invest in infrastructure, land use policies and improvement programs to ensure Frontenac is a competitive investment destination					
5	▪ Connect with the County and work with local and regional planning and development departments to review land-use policies in regards to potential accommodation opportunities.				Staff Time
6	▪ Connect with the County and work with local and regional planning and development departments to develop resource guides that encourage existing accommodation operators and assist future investors in navigating permits, incentive programs and approval processes.				Staff Time



#	Action	Timing (Years)			Budget
7	▪ Connect with the County and work with local and regional planning and development departments to introduce an Accommodation Grant/Loan Program as part of community improvement plans.				Staff Time

Recommendations for Best Bet Opportunities

#	Recommendation
Recommendations for all opportunities	
1	Host workshops (in conjunction with the County and other Townships) to educate existing and potential owners on the opportunities associated with developing short-term accommodations. Include a resource guide on how individuals can get started.
2	Expand, where applicable, the Community Improvement Plan definition and programs to include short-term and seasonal accommodations.
3	Leverage industry newsletters and websites to inform potential investors/entrepreneurs of available accommodation properties across the Frontenac region.
Opportunity One: Bed and Breakfast Accommodations	
4	Work with the Brand Ambassadors to include testimonials on the website and manuals which showcase traditional and unique bed and breakfast accommodation operators. Leverage testimonials to create a list that can be promoted and used in materials.
5	Propose policy amendments to local official plans to encourage (if applicable) (See Appendix A for examples): <ul style="list-style-type: none">▪ The development of bed and breakfasts on a variety of land uses including rural farmland, rural areas, urban cores or downtowns▪ The recognition of bed and breakfasts as commercial establishments eliminating the need of a property landlord to be living on premise.▪ The introduction of restrictions on short-term rental units that operate in a secondary dwelling or a residential unit outside of the main dwelling. For example, an individual owning a residential unit or secondary dwelling should not be allowed to promote and rent a bedroom or living quarter for five or less days to a visitor unless they are a registered commercial operation.
Opportunity Two: Redevelopment of Existing Cottage Accommodations	
6	Frontenac CFDC's strategic plan has identified upgrades to tourism accommodations as a focus area for continued investment. Working with the CFDC, promote the services and workshops offered by the CFDC to existing cottage rental owners.
7	Remain firm on maintaining commercial zoning when under pressure from residential developers.
Opportunity Three: Pod-Based Accommodations	
8	Invest and encourage in the development of pod accommodations alongside K&P and Cataraqui trailheads to support a growing market. Investigate if funds for pod development are available from the Province's Tourism Development Fund as an element of its Cycling Tourism Plan.



#	Recommendation
9	<p>Propose policy amendments to local Official Plans to include (if applicable):</p> <ul style="list-style-type: none">▪ Pod-developments as a form of short-term rental▪ Pod-developments to be an allowed use on properties adjacent to trailheads, existing campgrounds and in rural areas.▪ Allow the placement of pods on community facility property such as churches, parks, and libraries
Opportunity Four: Upscale Camping and Campground Accommodations	
10	Work with existing campgrounds and the CFDC to encourage the introduction of signature upscale camping products and experiences into the Frontenac region.
Opportunity Five: Niche Resort Accommodations	
11	Develop a short list of farm-based assets that could support the development of farm stay experiences across the region.
12	Host workshops (in conjunction with the County and other Townships) to educate farmers, home owners and seasonal cottage/cabin owners on the opportunities associated with developing niche accommodations on their properties.



Township of Frontenac Islands

The following report is a short overview of the County of Frontenac Accommodation Review and Strategy for Growth. The report has specifically been generated to reflect Frontenac Islands' tourist profiles, current policy considerations, best bets and recommendations.

Tourist Profiles

Understanding what types of accommodations and activities desired by tourists is important to developing and supporting accommodations and the broader tourism sector in the region. The following figure shows that, overall, hotels and motels are the preferred accommodation choices for the tourists who visit the Frontenac region; only 'Nature Lovers' prefer campgrounds.

Figure 1: Profiles of Tourists who Visit the Frontenac Islands Region

Segment	Definition	Accommodation Choices
Tourist Profiles for those Visiting the Frontenac Islands Region		
Nature Lovers	<p>Typically, this group is made up of families with children, with a passion for outdoor experiences. Travel is seen as an opportunity about exporting new places, off the beaten path.</p> <p>Typically they have a lower than average travel budget and are happy with the basics (i.e. camping), spending time with their families, and finding opportunities for family bonding and creating new family memories.</p> <p>Preferred activities include hiking, beaches, canoeing, parks and fishing.</p> <p>42% rely on family and friends for travel tips.</p> <p>78% use the internet to plan, including accommodation sites, online travel agencies and destination sites.</p>	<ul style="list-style-type: none">32% serviced campground/ trailer park26% hotels19% family/friends11% unserviced campgrounds
Connected Explorers	<p>Typically, this group is under 40 years old, both with and without children. This group is characterized as a confident and youthful and are an optimistic group with a need to travel and to expose themselves to new experiences as well as expand their horizons.</p> <p>Typically they look for a fully packed schedule of activities, using the internet to research, book, plan and share their travel experiences.</p> <p>Preferred activities include visiting museums, galleries, shopping, parks, landmarks, culinary, spa and beaches.</p> <p>They like to do what the locals are doing (e.g. events, restaurants, attractions).</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">57% hotel/boutique hotel21% family/friends14% motel9% inn/bed and breakfast
Additional Tourist Profiles for those visiting South Frontenac and Frontenac Islands		



Segment	Definition	Accommodation Choices
Up and Coming Explorers	<p>Typically, this group are young families, aged 18-34 with children and have diverse backgrounds, including visible minorities (45%) and immigrants (40%).</p> <p>This group is recently affluent and emerging into a new life phase that includes fresh experiences such as travel. Travel is seen as an opportunity to learn and explore as a nuclear family. Typically this group starts with tourist destinations nearby and visits areas typically considered to have core tourist attractions.</p> <p>Typically rely heavily on the internet to plan trips including accommodation websites and online travel agents.</p> <p>57% visit attractions such as amusement parks/zoo/aquariums.</p> <p>70% plan trips around the world's most famous sites.</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">45% hotel/boutique hotel23% friends/family22% motels10% resorts
Sports Lovers	<p>Typically, this group is middle-aged men, aged 35-54. They are enthusiastic about sports and see themselves as more active than typical travellers, although, in reality, they look for rest and relaxation more than other groups.</p> <p>Typically, they are looking for organized sports and golf.</p> <p>50% attend sporting events and 37% say it is their main reason to travel.</p> <p>47% take part in sports while travelling.</p> <p>16% played golf on their most recent trip.</p> <p>38% rely on family friends for travel planning, 22% use their own experience, 15% use brochures and 11% use associations.</p>	<ul style="list-style-type: none">55% hotel/boutique hotel19% family/friends11% motels7% resorts
Family Memory Builders	<p>Typically, this group is made up of couples with young children, aged 35-54. They have built their lives around their children and are looking for tourism experiences that allow them to spend time as a family.</p> <p>45% visited amusement parks, theme parks, zoos, aquariums.</p> <p>54% went shopping and 42% visited a beach.</p> <p>77% want to connect with family on vacation and create lasting memories as a family.</p> <p>Often prefer accommodations that provide consistent internet connectivity.</p>	<ul style="list-style-type: none">51% hotel/boutique hotel27% family/friends13% motels8% resorts

Source: TNS, Reference Report- Accommodations in Ontario (2012), TNS, Tourist Segments (n.d.)



Current Policy Considerations

Official Plan Considerations

The following table highlights the key accommodation related policies found in the Township Official Plan.

Figure 2: Official Plan Policy Implications for Accommodation Development

Frontenac Islands Official Plan
Section 4.10 Bed and Breakfast Operations Permitted In Certain Areas <ul style="list-style-type: none">▪ Bed and Breakfast operations can be permitted in certain areas as established in the implementing Zoning By-law. Such establishments must be operated by one or more permanent residents of the dwelling house. A maximum of three guest rooms may be used for overnight accommodation of the travelling public.
Section 5.2 Rural Designated Lands Allow For Tourism and Accommodation Related Uses <ul style="list-style-type: none">▪ The predominant use of land within the Rural designation may include all agricultural uses outlined in Section 5.1 of this Plan, forestry, “Wind Farms”, reforestation, conservation, community facilities, home occupations and professional offices in residences and accessory buildings, outdoor recreational facilities such as golf courses, hiking and cross-country ski trails which require a large land area, bed and breakfast establishments and similar, small-scale accommodation which caters to tourists and travellers and is compatible with the rural character of the area.
Section 5.2.4.2 Shoreline Residential Uses Permit Accessory Uses for Accommodation Development <ul style="list-style-type: none">▪ Resort commercial uses which provide lodging and accommodation for the vacationing public such as motels, lodges, cottage establishments and cabins, and bed and breakfast operations, with accessory residential uses for the owner and recreational uses such as tennis courts, swimming pools and golf courses. Resort institutional uses which provide camping and resort type accommodation for religious and private non-profit organizations are also permitted.
Section 5.2.4.4 Tent, Trailer and Recreational Vehicle Parks Are Limited to Seasonal Operations and Size <ul style="list-style-type: none">▪ The uses permitted for tent, trailer and recreational vehicle parks are limited to seasonally operated schedules along with any accessory facilities such as docks and convenience stores catering to the day-to-day needs of tourists. Tent, trailer and recreational vehicle park shall be large enough to support the proposed number of campsites, accessory uses and open space areas but shall be not less than 4 ha. [9.88 ac.] in area
Section 5.5 Village Land Use Policies Allow For Bed and Breakfast Establishments <ul style="list-style-type: none">▪ The predominant form of land use will be single detached dwellings. Other residential permitted uses will include; a full range of low and medium housing types, multiple unit residential development; apartments-in-a-house; apartment units associated with a retail commercial use; bed and breakfast establishments; and senior citizen's housing.



Frontenac County Official Plan

Section 2.0 – Support Economic Sustainability Across the Region

- This includes, but is not limited to, the development of golf courses, resorts, campgrounds, trailer parks, marinas, tourist accommodation facilities, museums, historical and scenic tours and heritage sites as elements of a successful tourism economy. The maintenance and use of lakes and rivers in Frontenac also play a significant role in providing opportunities for tourism and leisure activities.

To succeed, Frontenac County will need to work with its member municipalities, the Province, Frontenac Community Futures Development Corporation, City of Kingston, and various tourism agencies and organizations to promote tourism activity.

Section 3.3 - Rural Lands Provide Tourism Opportunities

- This includes the promotion of the tourism economy across the Frontenac region by ensuring suitable lands are available to satisfy demands for tourism and tourism related development. To encourage economic diversification in rural lands is to include a greater flexibility for on-farm activities, home-based businesses and agri-tourism, and new small scale industrial-type ventures that are connected to the farm economy such as milk processing, cheese factories and craft breweries.

Special Policies – Rural Waterfront Areas

- To permit shore land development that allows for sustainable growth of existing and new tourist developments and innovative and appropriately designed new residential developments.

Section 4.1 Trail Development and Scenic Routes as a Priority

- Frontenac County's location and scenic assets provide ample opportunities for creating scenic or heritage routes. These routes draw both local residents and tourists to the scenic areas of the County. Cycle tourism can benefit the economy of businesses across the Frontenac region.

Community Improvement Plan

The following table highlights the key accommodation related policies found in the Community Improvement Plan.

Figure 3: Community Improvement Plan Policies for North Frontenac

Program	Marysville CIP
Community Improvement Loan Program: Preferential financing for eligible projects, approved under the Grant Programs but excludes the Municipal Fees Grant Program.	An interest free loan to a maximum of \$7,500 amortized over five years is available to assist property owners in addition to the grant programs.
Facade Improvement Program: Intended to improve the appearance of commercial and residential buildings in order to improve the overall aesthetics and character of the community.	A onetime grant of 50% to a maximum of \$3,000 of eligible project costs in order to improve commercial building features. A onetime grant of 50% to a maximum of \$1,000 of eligible project costs in order to undertake residential building improvements on Road 96 in the CIP area.



Program	Marysville CIP
Accessibility Enhancement: Encourage commercial property owners to retrofit entranceways and other access points to ensure facilities and commercial outlets are accessible to all members of the community.	Not Applicable
Municipal Fees Grant Program: Intended to reduce the costs of development and/or rehabilitation of existing buildings that contribute to the quality of the community.	A onetime grant equal to the total application costs or \$2,000, whichever is the lesser. Application fees must be for improvement projects that qualify for other programs.
Commercial Space Conversion: Support new businesses looking to locate in the village core and also provides some funds to existing residential properties along Highway 96 for conversion into new businesses to increase the overall business activity within the village area.	A onetime grant of 50% to a maximum of \$1,000 of eligible project costs for projects that increase commercial building stock within the CIP area.
Other Community Specific Programs	
<ul style="list-style-type: none">▪ Frontenac Islands Marysville CIP- Seniors Housing Study Incentives: Funding is available to help promote the development of new affordable seniors housing in and around the village of Marysville including supportive housing for seniors, through the funding of background studies. This would be focused on new projects, rather than renovation of existing dwellings. However funding for conversions could also be considered on a case-by-case basis if the units are accessible. A onetime grant of 50% to a maximum of \$5,000 of eligible project costs for studies to support a new seniors housing development of 4 or more units in the CIP area.	

Best Bets

Based on the findings from the engagement and research phases, the following five opportunities were identified as 'best bet' areas that can support Frontenac Islands' tourism industry:

1. Bed and Breakfast Accommodations
2. Redevelopment of Existing Cottage Accommodations
3. Pod-Based Accommodations
4. Upscale Camping and Campground Accommodations
5. Niche Resort Accommodations

Recommendations

The following recommendations identify key goals for investment opportunities with regards to accommodation development. Each recommendation includes specific tactics, activities, and timeframes. However, more importantly, it sets a critical path for Township staff to follow.



#	Action	Timing (Years)			Budget Allocation
		0-1	1-2	3+	
Critical Path 1 Establish and strengthen relationships required to pursue investment in the tourism and accommodation industry					
1	▪ Connect with the County to set up a steering committee to provide direction on rolling out this strategy and act as the primary connection to accommodation development in the community.				Staff Time
2	▪ Connect with the County how it can support its tourism industry, including accommodation operators.				Staff Time
3	▪ Assist the County in creating a small network of committed local realtors.				Staff Time
Critical Path 2 Pursue sophisticated marketing and sales tactics that will generate leads, turn them into prospects, and attract investment					
4	▪ Work with the County to distribute toolkits to encourage the development or redevelopment of accommodation properties. <ul style="list-style-type: none">▪ Any future toolkit should identify the value proposition of the accommodation opportunity and the key criteria for success.▪ Promote and distribute the toolkits to existing operators and new investors, illustrating the investment that has been made towards the growth of these opportunities.▪ Customize resource contacts for each toolkit (specific to each municipality).				Provided with strategy Staff Time
Critical Path 3 Establish and invest in infrastructure, land use policies and improvement programs to ensure Frontenac is a competitive investment destination					
5	▪ Connect with the County and work with local and regional planning and development departments to review land-use policies in regards to potential accommodation opportunities.				Staff Time
6	▪ Connect with the County and work with local and regional planning and development departments to develop resource guides that encourage existing accommodation operators and assist future investors in navigating permits, incentive programs and approval processes.				Staff Time
7	▪ Connect with the County and work with local and regional planning and development departments to introduce an Accommodation Grant/Loan Program as part of community improvement plans.				Staff Time



Recommendations for Best Bet Opportunities

#	Recommendation
Recommendations for all opportunities	
1	Host workshops (in conjunction with the County and other Townships) to educate existing and potential owners on the opportunities associated with developing short-term accommodations. Include a resource guide on how individuals can get started.
2	Expand, where applicable, the Community Improvement Plan definition and programs to include short-term and seasonal accommodations.
3	Leverage industry newsletters and websites to inform potential investors/entrepreneurs of available accommodation properties across the Frontenac region.
Opportunity One: Bed and Breakfast Accommodations	
4	Work with the Brand Ambassadors to include testimonials on the website and manuals which showcase traditional and unique bed and breakfast accommodation operators. Leverage testimonials to create a list that can be promoted and used in materials.
5	Propose policy amendments to local official plans to encourage (if applicable) (See Appendix A for examples): <ul style="list-style-type: none">▪ The development of bed and breakfasts on a variety of land uses including rural farmland, rural areas, urban cores or downtowns▪ The recognition of bed and breakfasts as commercial establishments eliminating the need of a property landlord to be living on premise.▪ The introduction of restrictions on short-term rental units that operate in a secondary dwelling or a residential unit outside of the main dwelling. For example, an individual owning a residential unit or secondary dwelling should not be allowed to promote and rent a bedroom or living quarter for five or less days to a visitor unless they are a registered commercial operation.
Opportunity Two: Redevelopment of Existing Cottage Accommodations	
6	Frontenac CFDC's strategic plan has identified upgrades to tourism accommodations as a focus area for continued investment. Working with the CFDC, promote the services and workshops offered by the CFDC to existing cottage rental owners.
7	Remain firm on maintaining commercial zoning when under pressure from residential developers.
Opportunity Three: Pod-Based Accommodations	
8	Propose policy amendments to local Official Plans to include (if applicable): <ul style="list-style-type: none">▪ Pod-developments as a form of short-term rental▪ Pod-developments to be an allowed use on properties adjacent to trailheads, existing campgrounds and in rural areas.▪ Allow the placement of pods on community facility property such as churches, parks, and libraries



#	Recommendation
9	Invest and encourage in the development of pod accommodations alongside K&P and Cataraqui trailheads to support a growing market. Investigate if funds for pod development are available from the Province's Tourism Development Fund as an element of its Cycling Tourism Plan.
Opportunity Four: Upscale Camping and Campground Accommodations	
10	Work with existing campgrounds and the CFDC to encourage the introduction of signature upscale camping products and experiences into the Frontenac region.
Opportunity Five: Niche Resort Accommodations	
11	Develop a short list of farm-based assets that could support the development of farm stay experiences across the region.
12	Host workshops (in conjunction with the County and other Townships) to educate farmers, home owners and seasonal cottage/cabin owners on the opportunities associated with developing niche accommodations on their properties.