



COMMUNITY VISITOR PLAN

2024 – 2027

— City of —
PICKERING

Land Acknowledgement

We acknowledge that the City of Pickering resides on land within the Treaty and traditional territory of the Mississaugas of Scugog Island First Nation and Williams Treaties signatories of the Mississauga and Chippewa Nations. Pickering is also home to many Indigenous persons and communities who represent other diverse, distinct, and autonomous Indigenous nations. This acknowledgement reminds us of our responsibilities to our relationships with the First Peoples of Canada, and to the ancestral lands on which we learn, share, work, and live.



Foreword

A Message from Mayor Kevin Ashe

Pickering's central location in the GTA and wealth of attractions strengthens our burgeoning reputation as an exciting and vibrant tourism destination. With our 2024-2027 Community Visitor Plan, we're not just opening our doors; we're rolling out the red carpet for visitors from near and far. This plan isn't just a roadmap; it's a commitment to enhancing, welcoming, developing, distinguishing, and supporting every aspect of our dynamic community. Together, we're shaping Pickering into a premier destination that captures hearts and creates lasting memories for all that visit here.



A handwritten signature in black ink that reads "Kevin Ashe". The signature is written in a cursive style.

Kevin Ashe, Mayor, City of Pickering

Foreword

A Message from Central Counties Tourism

It was an absolute pleasure to facilitate the development and finalization of this incredible plan. I came into the process with high hopes and was not disappointed. The City of Pickering has long recognized the value of the visitor economy and has been working with Central Counties Tourism for years to help grow their capacity to welcome and engage visitors. The working group that formed the backbone of the planning process was one of the most well-versed of any community we have worked with, understanding the principles of destination development and the current needs within the municipality to take the visitor economy to the next level.

The end result is a community visitor plan that is unique to Pickering – layered with goals and objectives built on each other to incrementally move the needle closer to achieving “tourism success” for the municipality. Our promise to the City of Pickering is that we will be your partner each and every year as you develop and implement the actions and tactics to deliver on the goals and objectives. With each success, Pickering becomes a more vibrant community, attracting new visitors, residents and businesses.

The City of Pickering should be proud of what they have already achieved in terms of growing the visitor economy and excited about the successes that lie ahead as this plan gets implemented.

Best regards,

A handwritten signature in black ink, appearing to read 'Chuck Thibeault', written in a cursive style.

Chuck Thibeault, Executive Director

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Frenchman's Bay

Executive Summary

The City of Pickering is ideally located. It is about 40km from downtown Toronto along the northern shore of Lake Ontario and is easily accessible to visitors from the major 401 and 407 highways, GO trains/buses, the Waterfront Trail and by boat at Frenchman's Bay. This provides easy access to the over 7 million people living to the west and an incredible opportunity to be the overnight location for people travelling from the east to visit the GTA including downtown Toronto.

Currently, the Bay, along with the Waterfront Trail, Beachfront Park, Beachpoint Promenade & Alex Robertson Park, offers a scenic escape for over 100k visitors (traveling 40+km one-way) per year who enjoy a variety of activities including boating, biking, hiking, picnics, summer concerts in Millennium Square, as well as shopping and dining options in the charming Nautical Village.

A short distance away is Durham Live, Pickering's new premium entertainment district and home of the Pickering Casino Resort which has a 275-room hotel, multiple restaurants, a state-of-the-art concert theatre, and a large gaming facility. The area promises to be a major entertainment hub with future growth that includes a first-of-its-kind in Canada Porsche Experience Centre.

The city centre area, which welcomed over 340K visitors in 2022, is home to the Pickering Town Centre (PTC), a destination shopping mall. The PTC, along with the waterfront, and northern Pickering, make up the majority of the city's main attractions.

The Seaton Community is being developed as one of the Canada's largest residential and commercial areas. It also serves as an entry point to the Seaton Hiking Trail, which runs along beautiful West Duffin's Creek through the community of Whitevale and neighbours the Rouge National Urban Park.

Greenwood is another area under development with a new 44,000 sq. ft. Pickering Heritage & Community Centre, located on the site of the Pickering Museum Village, anticipated to launch in 2026.

With the current number of attractions and abundant development, Pickering is poised to see significant growth in visitors, helping business success throughout the city and growing both the vibrancy of the community and community pride.

This 2024-2027 Community Visitor Plan is the first such plan for the City of Pickering. It will serve to guide the City of Pickering staff, along with local tourism stakeholders and regional partners in welcoming more visitors to enjoy all that Pickering has to offer. This plan was developed by a steering committee with representatives from local businesses, attractions, outdoor assets, residents, and city staff. This committee assessed the challenges and opportunities for ‘visitor readiness’ across five key categories: attractions, businesses, infrastructure, customer service, and marketing/promotion. The work of the steering committee resulted in the identification of five core objectives for 2024-2027: Enhance, Welcome, Develop, Distinguish, Support. Each of these objectives has associated goals and action items and will serve as the roadmap for the 2024-2027 Community Visitor Plan.

ENHANCE	WELCOME	DEVELOP	DISTINGUISH	SUPPORT
<i>Develop new visitor products / experiences</i>	<i>Nurture a welcoming environment and pride-of-place</i>	<i>Encourage development of a visitor-friendly infrastructure</i>	<i>Establish a unique presence in the market</i>	<i>Source the required resources for destination management</i>
GOALS				
<ol style="list-style-type: none"> 1. Engage tourism stakeholders to develop new tourism products / experiences. 2. Develop new municipally-led tourism products / experiences 3. Solicit more group tourism events / tournaments 	<ol style="list-style-type: none"> 1. Educate on / communicate the importance of the visitor economy. 2. Nurture pride-of-place with Pickering residents, business owners and staff 	<ol style="list-style-type: none"> 1. Provide seamless transport to, from & within Pickering 2. Attract new accommodation providers 3. Provide on-site visitor facilities 4. Maintain, support and grow the outdoor trail network 5. Provide on-site visitor information 	<ol style="list-style-type: none"> 1. Build foundational marketing assets 2. Implement a communication strategy to differentiate Pickering 3. Promote Pickering as Inclusive, Diverse, Equitable, Accessible 	<ol style="list-style-type: none"> 1. Source funds and advocate for continued investment in the visitor economy 2. Recruit a team to champion and implement the Visitor Plan 3. Elevate the profile of the visitor economy as a municipal strategic priority 4. Collect visitor data to monitor success and areas for improvement



Pickering Museum Village Log Barn

Vision

The City of Pickering, its businesses, organizations and residents actively share their pride of the community with visitors year-round, making it a welcoming destination so that they will return time and again.

Mission



Introduction

The visitor economy has a significant contribution to the health of businesses across Canada, Ontario, Central Counties and Durham Region. In 2022 tourists contributed \$83B in spending across Canada and across the Central Counties (York, Durham and Headwaters regions), there were 13 million (M) overnight visits and a total of \$3 billion (B) in spending. In 2019, pre-pandemic, the tourism industry in Ontario generated revenue of over \$38B and in the 14 key cities and towns across Durham Region, 6.4M visitors were welcomed and contributed an estimated \$692M in spending (see Appendix I). These numbers reinforce the importance of the visitor economy and the importance of this plan.

This three-year (2024-2027) Community Visitor Plan outlines the City of Pickering's objectives, goals, and action items to achieve its 'Vision'. With this plan, Pickering joins its neighbouring municipalities, along with its regional, provincial, and federal partners in taking a proactive role in supporting the visitor economy (see Appendix II).

This plan was developed by a steering committee comprised of a diverse group of representatives from Pickering's tourism-related businesses and organizations, along with local residents, City of Pickering staff and representatives from the Region of Durham. The process was facilitated by Central Counties Tourism.



Frenchman's Bay

The Planning Process

This plan was developed with feedback from four facilitated sessions and surveys with the steering committee, as well as a community survey.

The four facilitated sessions were interactive with clear objectives to support the development of the plan.

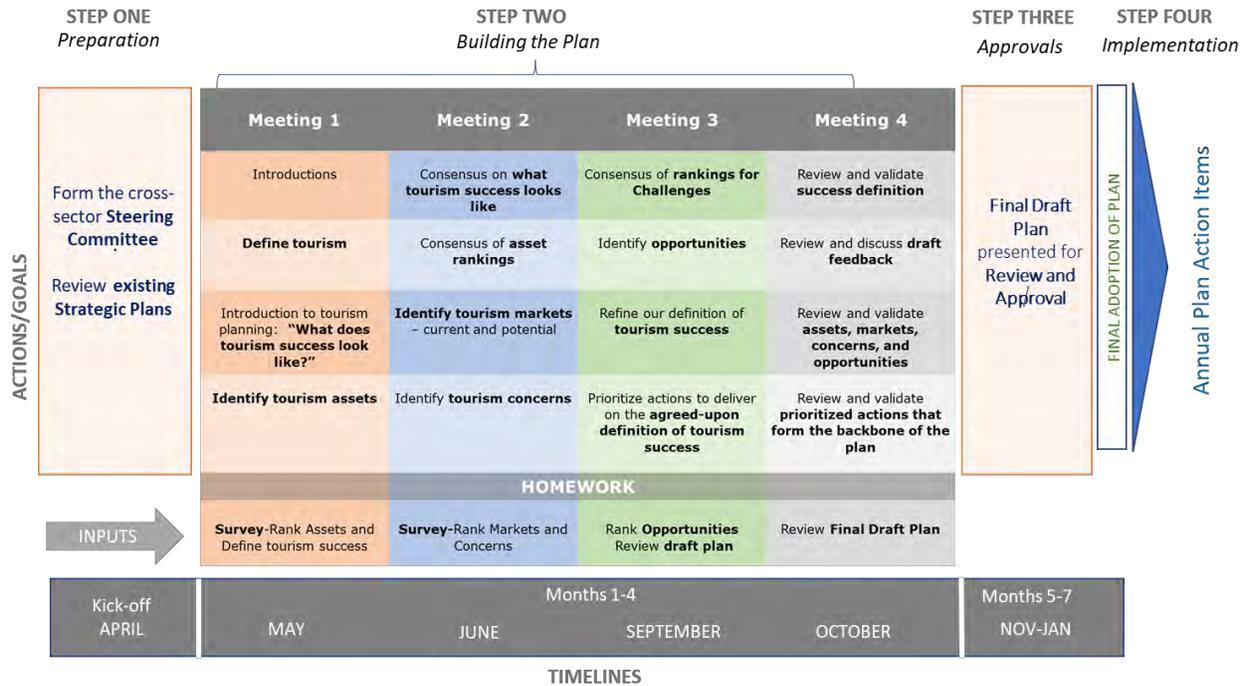
Session One: The group discussed the value of the visitor economy as an economic driver, job creator and contributor to the residents' quality of life and identified key tourism assets attracting people visit Pickering and started to define 'Success' for Pickering.

Session Two: The group ranked the tourism assets and reviewed the current visitor landscape in Pickering including: attractions, businesses, infrastructure, customer service, and marketing/promotion.

Session Three: The group identified and evaluated Pickering's tourism readiness to understand the challenges and opportunities that exist to achieve 'Success' and reviewed the results of the community survey.

Session Four: Finally, the group aligned the final 'Vision' for success and the objectives, goals and actions items for the Pickering Community Visitor Plan.

Pickering Community Tourism Plan Roadmap



Tourism in Pickering

Tourism Assets

Pickering has a number of businesses, attractions and events that drive visitation. According to research collected, the top reasons people visit Pickering are for the Casino, Waterfront / Nautical Village, Pickering Town Centre shopping, parks/trails, dining/restaurants and cultural sites, such as Pickering Museum Village. Events were also highlighted as one of the top drivers of visitation including Pickering Casino Concerts, Winter Nights City Lights, Winter Wonderland at Millennium Square, and the Waterfront Concert Series, among many others (see Appendix III).

It was noted that Pickering is well-poised for future growth in visitation having a number of visitor assets in development including the new Pickering Heritage & Community Centre, waterfront enhancements, and further development of the Durham Live Entertainment District (new Porsche Experience Centre).

Visitation

Geo-fencing research was completed for 2022 for the areas of Pickering Waterfront East, West, and the City Centre. The research showed within these areas there were over 450k visits, which contributed to an estimated annual visitor spend of over \$40M in the City Centre area and over \$10M at the waterfront (See Appendix IV).

For those visiting the Waterfront East area, it was found that the majority could be categorized in the Central Counties Tourism (CCT) visitor profile segments as 'Family Fun' (35%) and 'Adventure Seekers' (28%) and this was consistent with the Waterfront West and City Centre areas. These two segments have high potential for growth and could be key target markets to increase visitation (See Appendix V).

Visitor Readiness - Gap Analysis

The steering committee was asked to assess Pickering's visitor readiness and identify the challenges across the key tourism asset categories: Attractions, Businesses, Infrastructure, Customer Service, and Promotion.

Opportunities were then identified to address the challenges and this formed the basis to develop the objectives and action items for the plan. The opportunities were organized into five key pillars: Enhance, Welcome, Develop, Distinguish, and Support (See Appendix VI).



Pickering Museum Village Blacksmith Shop

The Plan - Objectives and Goals

OBJECTIVE ONE: ENHANCE

Develop new visitor products / experiences to attract more visitors with more reasons to visit and come back.

Goal 1: Engage tourism stakeholders to develop new tourism products / experiences.

Goal 2: Develop new municipally-led tourism products / experiences.

Goal 3: Solicit more group tourism events / tournaments.

OBJECTIVE TWO: WELCOME

Nurture a welcoming environment and pride-of-place with residents and businesses.

Goal 1: Educate on / communicate the importance of the visitor economy.

Goal 2: Nurture pride-of-place with Pickering residents and business owners.

OBJECTIVE THREE: DEVELOP

Encourage development of visitor-friendly infrastructure.

Goal 1: Provide seamless transport to, from, and within Pickering.

Goal 2: Attract new accommodation providers.

Goal 3: Provide on-site visitor facilities.

Goal 4: Maintain, support and grow the outdoor trail network.

Goal 5: Provide on-site visitor information.

OBJECTIVE FOUR: DISTINGUISH

Establish a unique presence in the market for Pickering, attracting visitors to explore all there is to see and do.

Goal 1: Build foundational marketing assets to promote Pickering as a destination.

Goal 2: Implement a communication plan to differentiate Pickering and promote the unique visitor experiences.

Goal 3: Promote Pickering as Inclusive, Diverse, Equitable & Accessible (IDEA).

OBJECTIVE FIVE: SUPPORT

Source the required resources to effectively manage Pickering as a visitor destination.

Goal 1: Source funds and advocate for continued investment in the visitor economy.

Goal 2: Recruit a team to champion and implement the Community Visitor Plan.

Goal 3: Elevate the profile of the visitor economy as a municipal strategic priority.

Goal 4: Collect visitor data to measure success, understand areas for improvement, and to inform marketing.



Pickering Casino Resort

The Plan - Action Items

OBJECTIVE ONE: ENHANCE

Develop new products / experiences to attract more visitors with more reasons to visit and come back.

	ACTION	TIMING	RESOURCES	COST* \$-low, \$\$-mid, \$\$\$-high	DEPARTMENT RESPONSIBLE
Goal 1: Engage tourism stakeholders to develop new tourism products/experiences.					
1.1.1.	Host networking events to encourage collaboration among businesses / organizations for product development	1-2 per year	City of Pickering Central Counties	\$	Lead: Economic Development & Strategic Projects Support: Community Services
1.1.2.	Collaborate across municipalities to provide regional tourism experiences e.g. participate in municipal leadership meetings and networking	2024-2027	City of Pickering Durham Tourism, Central Counties	\$	Lead: Economic Development & Strategic Projects Support: Community Services
1.1.3.	Engage businesses to develop new tourism products /experiences /events e.g. multi-stakeholder routes / “trails”, IDEA events, multi-faceted creative industries events	2024-2027	City of Pickering Central Counties	\$	Lead: Economic Development & Strategic Projects & Community Services

(*Estimated Cost \$-low=Under \$10,000, \$\$-mid=\$10,000 to \$50,000, \$\$\$-high=Over \$50,000)

Goal 2: Develop new municipally-led tourism products / experiences.

1.2.1.	Continue to host festivals / events that are unique to Pickering e.g. Fall Fling & Winter Wonderland	2-4 per year	City of Pickering	\$\$\$	Lead: Community Services
1.2.2.	Support development of new waterfront / Nautical Village experiences e.g. lifejacket rentals & kayak launches	2024-2025	City of Pickering	\$\$	Lead: Economic Development & Strategic Projects & Community Services
1.2.3.	Develop new municipal tourism routes / “trails” through collaborations / partnerships e.g. Indigenous Art Trail, Film Set Locations Tour	2024-2025	City of Pickering Invest Durham DEI	\$\$	Lead: Economic Development & Strategic Projects & Office of the CAO
1.2.4.	Develop and/or partner to create infrastructure to support shoulder season experiences e.g outdoor skating & event spaces.	2024-2027	City of Pickering	\$\$\$	Lead: City Development & Operations Support: Community Services

Goal 3: Solicit more group tourism events / tournaments.

1.3.1.	Collaborate with local and regional stakeholders to bid-on / host more sport tourism events (align with the Recreation & Parks – 10 Year Plan)	2024-2027	City of Pickering Durham Tourism	\$\$	Lead: Economic Development & Strategic Projects Community Services & Operations
1.3.2.	Invite more visiting school groups from neighbouring schoolboards to existing attractions e.g. Pickering Museum Village, and Claremont Nature Centre etc.	2024-2027	City of Pickering	\$	Lead: Community Services

OBJECTIVE TWO: WELCOME

Nurture a welcoming environment and pride-of-place with residents and businesses.

	ACTION	TIMING	RESOURCES	COST	DEPARTMENT RESPONSIBLE
Goal 1: Educate on / communicate the importance of the visitor economy.					
2.1.1	Promote and communicate the importance of the visitor economy with residents, staff, and council etc. e.g. & tourism campaign, share success stories of local businesses	2024 - 2025	City of Pickering	\$	Lead: Economic Development & Strategic Projects
2.1.2.	Roll-out a tourism ambassador training program for front line workers, seniors, high school volunteers / school clubs etc.	2024-2027	City of Pickering Central Counties Tourism	\$	Lead: Economic Development & Strategic Projects & Community Services
Goal 2: Nurture pride-of-place with Pickering residents and business owners.					
2.2.1.	Implement programs to encourage business owners and front-line employees to explore Pickering e.g. Host industry familiarization (fam) tours and/or implement a reciprocal admissions program for local attractions.	2024	City of Pickering	\$\$	Lead: Economic Development & Strategic Projects Support: Community Services

2.2.2.	Develop and push out email communications to the resident database to promote all that is happening in Pickering.	2024	City of Pickering	\$	Lead: Economic Development & Strategic Projects & Office of the CAO Support: Community Services
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OBJECTIVE THREE: DEVELOP

Encourage development of visitor-friendly infrastructure

	ACTION	TIMING	RESOURCES	COST	DEPARTMENT RESPONSIBLE
Goal 1: Provide seamless transport to, from, and within Pickering.					
3.1.1.	Improve transportation infrastructure by advocating across municipal departments and with developers e.g. busing, walking paths Explore opportunities to coordinate transportation across the region/ province.	2024-2027	City of Pickering Roads Dept. Durham Region Developers	\$\$\$	Lead: Engineering Services
3.1.2.	Explore / promote transportation alternatives for events/ peak visitor times e.g. public transit, alt transportation rentals e.g. trolley, bus, bike, scooter	2024-2027	City of Pickering	\$\$	Lead: Economic Development & Strategic Projects & Community Services Support: City Development (Sustainability)

3.1.3.	Explore new parking solutions e.g. support event organizers with parking options, shuttles (Go, DRT), active transportation, by-law allowance for street parking etc.	2024-2027	City of Pickering Durham Region	\$\$	Lead: Engineering Services Support: Economic Development & Strategic Projects, Community Services & Operations
3.1.4.	Implement a way-finding strategy to promote road-side and online navigation e.g. signage, Google Maps, short message service (SMS) App etc.	2024-2027	City of Pickering Central Counties	\$\$	Lead: Operations Support: Economic Development & Strategic Projects, Corporate Communications, Community Services & Region of Durham
Goal 2: Attract new accommodation providers.					
3.2.1.	Encourage development of more visitor accommodation options e.g. publicize hotel and visitation data to show business opportunity	2024-2027	City of Pickering Central Counties	\$	Lead: Economic Development & Strategic Projects
Goal 3: Provide on-site visitor facilities.					
3.3.1.	Advocate for a new purpose-built event space for larger events	2026	City of Pickering	\$\$\$	Lead: Community Services Support: Operations,

					Engineering Services & City Development
3.3.2.	Improve availability of washroom facilities for visitors e.g. Build year-round facilities (portable or permanent) in key visitor areas and / or open existing facilities year-round.	2024-2027	City of Pickering	\$\$\$	Lead: Operations & Engineering Services
Goal 4: Maintain, support and grow the outdoor trail network.					
3.4.1	Support current trail strategies including winter maintenance / grooming	2024-2027	City of Pickering Durham Region TRCA	\$	Lead: Operations Support: Engineering Services
3.4.2.	Improve trail connectivity to the core commerce areas e.g. signage / apps	2024-2027	City of Pickering TRCA	\$\$	Lead: Engineering Services Support: Operations
Goal 5: Provide on-site visitor information.					
3.5.1.	Implement a solution to provide on-site visitor information e.g. Partner with others (e.g. Casino, Go-transit, Town Centre, TRCA) to implement self-serve information kiosks in central locations and/or procure a mobile tourism trailer	2025	City of Pickering Businesses	\$\$	Lead: Economic Development & Strategic Projects Support: Corporate Communications

OBJECTIVE FOUR: DISTINGUISH

Establish a unique presence in the market for Pickering, attracting visitors to explore all there is to see and do.

	ACTION	TIMING	RESOURCES	COST	DEPARTMENT RESPONSIBLE
Goal 1: Build foundational marketing assets to promote Pickering as a destination.					
4.1.1.	Build a dedicated Tourism Website to house visitor information (event listings, business & attraction information etc.)	2025-2026	City of Pickering	\$\$	Lead: Economic Development & Strategic Projects Support: Community Services
4.1.2	Explore the opportunity to add and manage dedicated social media channels and digital information e.g. Facebook, Instagram, Google etc.	2025-2026	City of Pickering	\$	Lead: Economic Development & Strategic Projects & Community Services Support: Corporate Communications
4.1.3	Advocate for Tourism Promotions on current digital signage, and investigate installing digital signage in Pickering that is dedicated to Tourism	2024-2026	City of Pickering	\$\$\$	Lead: Corporate Communications & Community Services
4.1.4	Collect visitor contact information at events / online to build visitor contact database	2024-2027	City of Pickering	\$\$	Lead: Economic Development & Strategic Projects & Community Services

Goal 2: Implement a communication strategy to differentiate Pickering and promote the unique visitor experiences.

4.2.1.	Implement a paid-media communications strategy (social media, print, PR, influencers) to promote unique experiences e.g. businesses, waterfront / Nautical Village, Casino, Pickering Museum Village.	Ongoing	City of Pickering Central Counties Durham Tourism	\$\$	Lead: Economic Development & Strategic Projects & Office of the CAO Support: Community Services
4.2.2.	Develop and promote bundled/ package experiences that feature attractions and businesses together (trip ideas- places to eat, stay, and play)	2024-2027	City of Pickering Businesses	\$	Lead: Economic Development & Strategic Projects
4.2.3.	Produce and distribute visitor content/ trip ideas for regular distribution to visitor contact database.	2025-2026	City of Pickering	\$	Lead: Economic Development & Strategic Projects, Community Services Support: Office of the CAO

Goal 3: Promote Pickering as Inclusive, Diverse, Equitable & Accessible (IDEA).

4.3.1.	Implement marketing that represents the diversity of visitors to Pickering (age, financial status, abilities, cultures etc.)	Ongoing	City of Pickering	\$	Lead: Corporate Communications Support: Economic Development & Strategic Projects & Office of the CAO
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4.3.2.	Spotlight businesses, events, attractions, and individuals etc. that represent the IDEA community in Pickering. e.g. Indigenous Artists, LGBTQ2S+ business owners etc.	Quarterly	City of Pickering	\$	Lead: Office of the CAO Support: Economic Development & Strategic Projects & Community Services
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OBJECTIVE FIVE: SUPPORT

Source the required resources to effectively manage Pickering as a visitor destination.

	ACTION	TIMING	RESOURCES	COST	DEPARTMENT RESPONSIBLE
Goal 1: Source funds and advocate for continued investment in the Visitor Economy.					
5.1.1.	Advocate for a municipal budget to support tourism development	2024	City of Pickering	\$	Lead: Economic Development & Strategic Projects & Community Services
5.1.2	Continue to apply for grants to support municipal tourism initiatives	Ongoing	City of Pickering	\$	Lead: Economic Development & Strategic Projects & Community Services
5.1.3	Provide tourism stakeholders with channels to source information about grant opportunities and “grant	Ongoing	City of Pickering Central Counties	\$	Lead: Economic Development & Strategic Projects

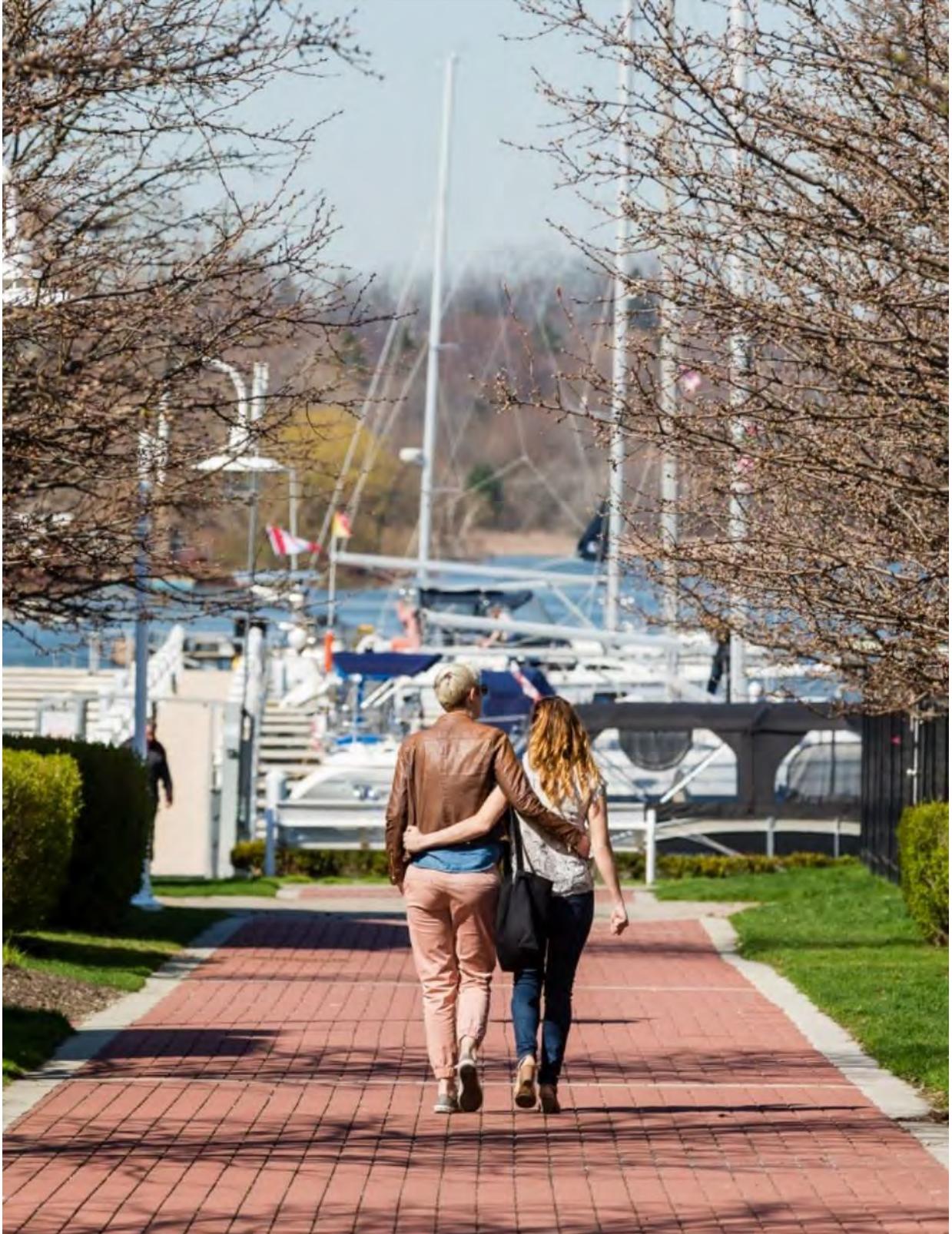
	writing" training e.g. CCT, TIAO				& Community Services
5.1.4.	Explore the feasibility of a Municipal Accommodation Tax (MAT)	2025	City of Pickering	\$	Lead: Economic Development & Strategic Projects, Corporate Services & Finance
5.1.5	Explore ideas to raise funding for tourism e.g. Tourism Investment Expo	2027	City of Pickering	\$\$	Lead: Economic Development & Strategic Projects & Community Services
Goal 2: Recruit a team to champion and implement the Visitor Plan.					
5.2.1.	Hire dedicated tourism staff to implement against the Visitor Plan e.g. Canada Summer Jobs, college internships and co-op programs	2025-2026	City of Pickering	\$\$	Lead: Economic Development & Strategic Projects
5.2.2.	Recruit a Tourism Panel to guide implementation of the Visitor Plan	2024-2025	City of Pickering	\$	Lead: Economic Development & Strategic Projects Support: Community Services
5.2.3.	Recruit volunteers and manage a volunteer / ambassador program	2024	City of Pickering	\$	Lead: Community Services Support: Economic Development & Strategic Projects

Goal 3: Elevate the profile of the Visitor Economy as a municipal strategic priority.

5.3.1.	Allocate a representative to provide the 'voice of the visitor economy' on other committees e.g. Advisory Committees, Planning, Transportation etc.	2024	City of Pickering Durham Region	\$	Lead: Economic Development & Strategic Projects
5.3.2.	Schedule annual updates to staff leaders and council to communicate progress against the Visitor Plan and the importance of the visitor economy. Also consider a familiarization trip.	Ongoing	City of Pickering	\$	Lead: Economic Development & Strategic Projects & Community Services

Goal 4: Collect visitor data to measure success, understand areas for improvement, and to inform marketing.

5.4.1.	Measure visitation by geofencing high-traffic visitor areas to track year-over-year results	2024	City of Pickering Central Counties	\$	Lead: Community Services
5.4.2.	Engage events and businesses to track their visitor postal codes for analysis.	2024	City of Pickering, Central Counties Businesses	\$	Lead: Economic Development & Strategic Projects & Community Services
5.4.3.	Roll-out visitor surveys to understand satisfaction and areas for improvement.	1-2 per year	City of Pickering Central Counties	\$	Lead: Economic Development & Strategic Projects & Community Services



Nautical Village

Acknowledgements

Thank you to the individuals who made up the steering committee and devoted their time to support the development of this Community Visitor Plan for the City of Pickering.

Steering Committee

Wayne Odegard	Pickering Casino Resort
Derek Mappin	Pickering Casino Resort
Michèle Bolton	Open Studio Art Café
Tina Haramis	Frenchman's Bay Yacht Club
Jessica Elliott	Cultural Advisory Committee
Michael McFarland	Cultural Advisory Committee
Ansonett Palmer	Cultural Advisory Committee
Deanna Cheriton	Toronto Region Conservation Authority / Petticoat Creek C.A.
Amanda Perricone	Toronto Region Conservation Authority / Petticoat Creek C.A.
Lorna Murphy	Cushman & Wakefield Asst Services, Pickering Town Centre
Lexi Whalen	Land Over Landings
Jim Miller	Land Over Landings and Owner, Thistle Ha' Farm, National Historic Site
Laura Gibbs	City of Pickering, Division Head, Culture and Community Programming / PMV / PHCC
Nicole Hann	City of Pickering, Public Affairs & Communications Associate, Office of the CAO
Laraib Arshad	City of Pickering, Economic Development & Strategic Projects
Krystal Roberts	City of Pickering, Acting Supervisor, Cultural Services
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Lisa Mackenzie	Region of Durham, Tourism Specialist
Eileen Kennedy	Invest Durham, Region of Durham, Film/T.V. Specialist

The development of this plan was facilitated with Central Counties Tourism's Chuck Thibeault, Executive Director and Lisa John-Mackenzie, Industry Relations Manager for Durham Region.

Glossary

Tourist or Visitor - The term “Tourist” or “Visitor” can have various meanings and the terms may be interchanged, but for the purposes of this report, we use the following definitions. Destination Canada defines a “Visitor” as a traveler taking a trip outside his/her usual environment, for less than a year, for any purpose (business, leisure or other personal purpose) other than to be employed.¹ To measure visitation the province of Ontario defines a “Visitor” as someone who takes an overnight out-of-town trip, or an out-of-town same-day trip of 40 kilometers or more away from their home.² Visitors could include such groups as bus tours, sports teams, or individuals visiting friends and relatives etc.

Index- Index numbers are a way of expressing the difference between two measurements by designating one number as the "base", giving it the value 100 and then expressing the second number as a percentage of the first. Example: If the population of a town increased from 20,000 in 1988 to 21,000 in 1991, the population in 1991 was 105% of the population in 1988. Therefore, on a 1988 = 100 base, the population index for the town was 105 in 1991.

(<https://www150.statcan.gc.ca/n1/pub/11-533-x/using-utiliser/4072258-eng.htm>)

Example: An index for visitation is how your audience compares to the average of the area being studied, the benchmark. An index of 110 means that there is a 10% higher concentration of that specific variable within your audience than the average. An index of 100 is the average for the area

Inbound Tourism Spend / Expenditure- The tourism expenditure of a non-resident visitor within the economy of reference.

Unique Visitors- The average number of individuals visiting the analyzed domain, within the country and time period analyzed. A user who arrived at a site once or a number of times is a single unique visitor to that domain.

TRIEM Model- The Tourism Regional Economic Impact Model (TREIM) is a data analysis simulation tool that helps organizations and people who are interested in tourism to learn more about the economic impact of tourism in Ontario. The model is capable of simulating tourism-related economic impacts from 2010 to 2025, such as: economic impact of specific tourism events, impacts on the supply side by tourism industry sector, impacts by type of capital project for the chosen region.
<https://www.ontario.ca/page/tourism-regional-economic-impact-model>

Central Counties (RTO6) -This is the geographic area that makes up the Ontario government Regional Tourism Organization Six (RTO6). Central Counties or RTO6 includes all of Durham Region, York Region, and the Headwaters area.
<https://www.ontario.ca/document/tourism-regions/region-6-york-durham-and-headwaters>

FSA- A forward sortation area (FSA) is a way to designate a geographical unit based on the first three characters in a Canadian postal code. All postal codes that start with the same three characters—for example, K1A—are together considered an FSA.

Geo-fencing- Geofencing can provide an understanding of your customers through mobility data. By creating specific geofences (a virtual geographic boundary around a particular area), you will be provided an accurate estimate of the number of people that entered the area within your specified timeframe, where they came from, the average number of times locals vs non-locals visited, and important information about the behaviors of your predominant visitors. The numbers are determined based on cell phone data collected from people above the age of 15 that have their location services enabled which is then filtered through a weighted statistical model with proper sample size. Geofence data captures the number of unique visitors, the number of trips made by those visitors, the distance they travelled from their Common Evening Location (aka their home), and provides an analysis of these cell phone holders over a specific time period.

Resources

1. <https://www.destinationcanada.com/en/glossary>
2. www.ontario.ca/page/tourism-regional-economic-impact-model
3. [Tourism Industry Association of Canada, Tourism Jobs Matter, 2018. https://tiac-aitc.ca/Library/Travel_Economy_Series_JOBS_-_TIAC_Travel_Economy_Series_EN.pdf](https://tiac-aitc.ca/Library/Travel_Economy_Series_JOBS_-_TIAC_Travel_Economy_Series_EN.pdf)
4. [Innovation, Science and Economic Development Canada, Federal Tourism Growth Strategy, 2019. https://www.ic.gc.ca/eic/site/134.nsf/vwapi/Tourism_Strategy_eng_v8.pdf/\\$file/Tourism_Strategy_eng_v8.pdf](https://www.ic.gc.ca/eic/site/134.nsf/vwapi/Tourism_Strategy_eng_v8.pdf/$file/Tourism_Strategy_eng_v8.pdf)
5. [Destination Canada -Research Division. Tourism Fact Sheet, 2020/2019. https://www.destinationcanada.com/en/research#tourismincanada](https://www.destinationcanada.com/en/research#tourismincanada)
6. https://www.destinationcanada.com/sites/default/files/archive/1792-Quarterly%20Tourism%20Snapshot%20-%20Q4%202022/DC_Quarterly_Tourism_Snapshot_Q4_EN.pdf
7. <https://www150.statcan.gc.ca/n1/daily-quotidien/230526/dq230526b-eng.htm>
8. [Tourism Industry Association of Ontario, Quick Facts, 2019. https://www.tiaontario.ca/cpages/tourismquickfacts](https://www.tiaontario.ca/cpages/tourismquickfacts)
9. [Tourism Industry Association of Canada, Tourism Jobs Matter, 2018, https://tiac-aitc.ca/Library/Travel_Economy_Series_JOBS_-_TIAC_Travel_Economy_Series_EN.pdf](https://tiac-aitc.ca/Library/Travel_Economy_Series_JOBS_-_TIAC_Travel_Economy_Series_EN.pdf)
10. [Downtowns of Durham 2019 Visitation Research, Conducted by Central Counties Tourism on behalf of Durham Tourism.](#)
11. [Tourism Industry Association of Ontario: Travel and Destination Analytics Ontario, 2018 https://www.tiaontario.ca/articles/travel-and-destination-analytics-ontario](https://www.tiaontario.ca/articles/travel-and-destination-analytics-ontario)
12. [Ministry of Heritage, Sport, Tourism, and Culture Industries, http://www.mtc.gov.on.ca/en/tourism/tourism.shtml](http://www.mtc.gov.on.ca/en/tourism/tourism.shtml)
13. [Ministry of Heritage, Sport, Tourism, and Culture Industries, Regional Tourism Profiles - RTO6, 2021. http://www.mtc.gov.on.ca/en/regions/regions6.shtml](http://www.mtc.gov.on.ca/en/regions/regions6.shtml)

Appendix I

Why Tourism?

The tourism industry is critical to Canada, contributing significantly to the economy and job creation. The Tourism Industry Association of Canada [TIAC] describes the tourism workforce as “the backbone of the travel economy. Our ability to provide hospitality to all visitors to Canada, and its impact on the visitor experience, keeps businesses thriving.”³

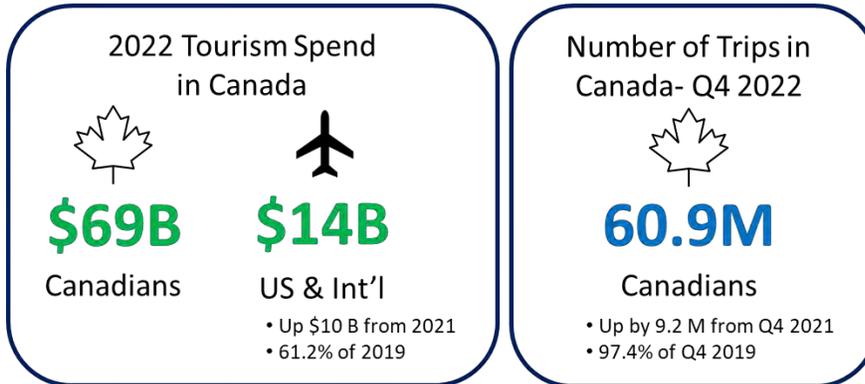
The 2019 Federal Tourism Growth Strategy: Creating Middle Class Jobs recognizes that every community has something to offer as a destination within the Canadian cultural landscape for visitors to explore.⁴ Tourism is one of the only sectors that employs Canadians in every area of the country. This includes every province, territory, and electoral riding.

In 2019, pre-pandemic, tourism was Canada's number one service export, totaling 2% of total exports, generating \$105 billion in revenue, and employing 1 in 11 Canadians with 2.1 million jobs.⁵

While the industry was the first and hardest hit sector during the Covid-19 pandemic (2020-2022), results from Canada's National Travel Survey indicate that the industry is now recovering. (see National Tourism Indicators Graph below) As reported in Destination Canada's fall 2022 Tourism Outlook⁶, domestic tourism spending in 2022 reached 92% of the 2019 pre-pandemic levels, with expectations for a full recovery in 2023. This 2022 domestic spending included Canadian residents who spent \$69.0 billion at home and international travelers to Canada, who spent \$14 billion. (US-\$7.4B, overseas-\$6.6B) This international spend was an increase of \$3.8 billion, over the \$10.0 billion spent in 2021. Despite this increase, this is still only 61.2% of what these international visitors spent in Canada during 2019, before the pandemic.

The fourth quarter of 2022 showed the strongest signs of recovery, with Canadian residents taking 60.9 million domestic trips, up by 9.2 million from the fourth quarter of 2021, and reaching 97.4% of the same quarter in 2019.⁷ Domestic travel expenditures by Canadian residents were \$14.5 billion in the fourth quarter of 2022, up 30.8% from the fourth quarter of 2021 (\$11.1 billion).

Quick Facts about Tourism in Canada



<https://www150.statcan.gc.ca/n1/daily-quotidien/230526/dq230526b-eng.htm>

Tourism in Ontario

The Tourism industry in Ontario has a huge impact on the economy with job creation and contribution to the provincial GDP. In 2019, pre-pandemic, the tourism industry in Ontario generated revenue of over \$38B (up 11.4% from 2018), which represents 4.3% of GDP.⁸ This industry generated \$13.3 billion in tax revenues and employed more than 396,000 people in over 200,000 businesses. In addition, tourism employs the most significant percentage of young people in Ontario (23%) aged 15-24 and grows year-round jobs in our communities.⁹



Tourism Industry Association of Ontario

Tourism in Central Counties and Durham Region

In 2022, there were 13 million domestic overnight visits (from 60+km away) to Central Counties (RTO6). Ten million of these overnight visits originated from Ontario, with the remaining 3 million from the rest of Canada. Together they contributed an estimated \$3 billion in visitor spend to the region.

In a 2019 study of fourteen cities and towns in the Durham Region, the number of tourists (from 40+ km away) totaled 6.4 million, with 94% originating from Ontario.¹⁰ According to the Tourism Regional Economic Impact Model (TREIM), these Ontario tourists contributed approximately \$692 million in visitor spend to Durham Region.

The Tourism Industry Association of Ontario [TIAO] and Global Payments Canada released a Travel and Destination Analytics Report in October 2019.¹¹ The report highlights findings for the 2018 inbound visitor spending trends in Ontario:

- Toronto, Niagara, and Central Counties accounted for 78.9 percent of inbound spending in Ontario.
- Inbound spend made up 2.3% versus domestic spend at 97.7%. For Central Counties region, this inbound spend came primarily from the United States [U.S.](49.5%) and China (36.4%).

Data Source: Central Counties Tourism

Appendix II

Tourism Organizations

Many organizations play critical support roles in Ontario's tourism industry.¹² Each of them has varying responsibilities and areas of focus to attract and service visitors and maximize the economic benefits to communities. At a local municipal level, there is a need to help coordinate and develop tourism experiences and products within the business community that can be positioned in the market at a regional, provincial, and national level.

Regional Tourism Organization 6 -Central Counties Tourism

Central Counties Tourism [CCT] is one of 13 Regional Tourism Organizations province-wide, funded by the Ontario Ministry of Heritage, Sport, Tourism, and Culture Industries.¹³ Central Counties, encompasses the regions of Durham, York, and Headwaters and coordinates, aligns and invests in product development, workforce development, strategic marketing, and investment attraction.

Region of Durham -Durham Tourism and Sport Durham

Durham Tourism is part of the Regional Municipality of Durham, Economic Development Division, Invest Durham. As the Destination Management Organization [DMO] for the Region, their objective is to develop and promote Durham Region to visitors with an emphasis on the areas of sports tourism under the brand Sport Durham. The Region supports eight municipalities in the following ways:

- Promotes Durham Region as a destination via trade and consumer/trade shows.
- Assists provincial tour operators by providing destination information.
- Coordinates familiarization tours for travel trade operators and media writers.

Municipal Tourism – The City of Pickering

The City of Pickering has staff resourcing devoted to destination development for the city with a focus on supporting tourism operators, hosting events, marketing, advocating for enhanced visitor readiness, and collaborating with regional tourism partners.

Local Tourism Businesses

Local tourism-based businesses, attractions, and events collectively make up the tourism assets for the City of Pickering and are the key drivers of the visitor economy. Pickering has many unique visitor sites and experiences, which can be promoted to enhance the residents' pride of place. The Pickering Casino, Pickering Town Centre, Pickering Museum Village, and Nautical Village businesses, among others, are all notable tourism development partners.

Partners in Tourism

The products and offerings of local businesses are the foundation of the tourism economy. The hierarchy of partners works vertically through alignment, strategic marketing, investment attraction, themed product development, and funding opportunities.



Tourism Partner Tools and Resources

Current Tools and Resources											
Tourism Support Partner	Tourism Education	Research /Tracking	Advocacy	General Marketing	Targeted Marketing	Visitor Information	Wayfinding Signage	Tourism Website	Maps and Guides	Industry Equipping	Community-Engaged
Destination Canada Promotes Canada’s market-ready products and experiences internationally.		✓		✓	✓			✓			
Destination Ontario (DeON) Promotes Ontario’s market-ready products and experiences domestically and internationally. DeON is an agency of the Ministry of Heritage, Sport, Tourism, and Culture Industries.		✓		✓	✓	✓	✓	✓			
Tourism Industry Association of Ontario [TIAO] Advocates tourism policy, regulation, education, and economics of tourism.	✓	✓	✓								
Regional Tourism Organization Central Counties Tourism-RTO6 Tourism product development, workforce development, industry equipping, and marketing in York, Durham and Headwaters regions.	✓	✓		✓	✓			✓		✓	
Durham Tourism/Sport Durham - Region of Durham Promotes Durham as a destination for domestic leisure, sport/group travel throughout the eight municipalities.	✓			✓	✓			✓	✓	✓	✓
The City of Pickering- Economic Development Promotes Pickering as a destination - the unique experiences, products, community and tourism assets.				✓					✓		✓

Appendix III

Pickering Tourism Assets

Tourism is the business of attracting and serving the needs of visitors who are travelling for leisure or business. It is essential to understand the primary attractors that draw visitors to a destination to understand the visitor needs and destination development requirements. Marketing will draw visitors to a destination once; great amenities, outstanding customer service, and a welcoming community will bring them back!

With input from the steering committee, an audit of Pickering's key tourism assets was completed and these assets were ranked according to their "Tourism Strength" which includes:

- how attractive the asset is to visitors? i.e. the number of visitors it attracts
- how much it contributes to the visitor economy? i.e. the spending it generates
- how unique the asset is to the Pickering community?
- how easily the asset can be promoted to tourists?

1. Attractions

Tourist attractions may draw visitors for either natural beauty, unique constructed experiences (cultural/ historic), or engaging entertainment. Inherently, it is the 'things to see and do' within a destination, that attract people. The lead attractions can actually generate the travel demand, and be synonymous with 'a destination'.

Pickering has a number of engaging visitor attractions that span across several categories and will continue to grow this over the next few years, with new attractions being built e.g. New Pickering Heritage & Community Centre (planned for 2026)

- 1) Casino
- 2) Waterfront
- 3) Arts, Culture, Heritage
- 4) Concerts and Shows

- 5) Golf
- 6) Sporting Facilities
- 7) Kids and Family Activities
- 8) Entertainment/ Nightlife
- 9) Sports (Spectator)

2. Tourism Businesses

Tourism businesses can be defined as those that help fulfill visitors' needs, including accommodations, food and beverage, transportation, meeting and event venues, agritourism locations, specialty retail and services. Types of tourism businesses include: hotels, motels, campgrounds, bed and breakfast properties, service stations, car rental and boat charter services, transportation services (air, rail & ground), restaurants, craft breweries, and more.

Pickering offers a variety of dining and shopping choices, with a destination mall, many restaurants, boutique retail shops, and markets.

- 1) Event Venues
- 2) Shopping Tourism
- 3) Specialty Food and Beverage
- 4) Unique Accommodation
- 5) Agri-tourism

3. Infrastructure

Tourism Infrastructure includes roads, bike lanes, public transit, parking areas, wastewater and garbage disposal facilities, water and power services, access to cellular service, availability of fuels such as diesel, natural gas, propane, and gasoline, location and distance signage, and police and emergency services. The availability and quality of services and amenities available to travelers will affect a community's ability to attract visitors.

The City of Pickering has a strong network of infrastructure to support the visitor economy including a good transportation system with access by car, bus, rail, and boat.

It is a main stop for GO Transit (buses and trains), is home to the Frenchman's Bay Yacht Club and is situated in close proximity to the Toronto Pearson International Airport. Pickering also provides many public parking options, parks with picnic areas (including the Rouge National Urban Park, one of the largest urban parks in North America), dog parks, and trails.

4. Customer Service

Customer Service includes welcoming tourists and providing them with great hospitality by anticipating their needs and providing superior customer service, as well as being an ambassador for the city. Visitors have high expectations of the quality of personal service they receive from tourist attractions, businesses and the municipality. Providing an excellent visitor experience can help establish the reputation of a destination, such as Pickering, as being welcoming, inclusive, diverse, accessible, and an overall great experience.

Today each of the tourism stakeholders provides superior customer service to directly their patrons, but there are no formalized destination management customer service efforts e.g. Tourism Ambassador Training. Pickering does not currently have a tourism information office and limited information is available online.

5. Marketing/Promotion

Tourism promotion involves activities to attract and lengthen the stay of visitors. This may include managing and increasing exposure of owned media (website and social media pages). A paid media strategy can help drive traffic to desired social pages and websites. This may include co-operative advertising, attendance at travel shows, magazine articles, brochures, maps, commercial and promotional signs, travel guides, advertising (print, digital, radio or television) and tourism information centers. Promotion can also include increasing earned media, such as word-of-mouth marketing, publicity through various media outlets/ influencers and visitor reviews and ratings.

The City of Pickering currently provides and manages visitor content on the [City of Pickering website](#). Communication is currently pushed out through the City of Pickering social media channels and a resident email list is housed in the recreation database.

Tourism Asset Inventory

Included is an inventory of some of the tourism assets Pickering currently offers to residents and visitors.

ATTRACTIONS	NATURAL ATTRACTIONS
<ul style="list-style-type: none"> • Pickering Casino/ Hotel/ Events Space/ Concerts (The Arena) • Nautical Village • Yacht Clubs / Marina • Golf Clubs • Claremont Nature Ctr • Splash Pad • Recreation / Sports (Soccer Dome, Chestnut Hills Development) • Pickering Playing Fields (Driving Range, Mini Putt etc) • Farms- Hy Hope • Shopping- Pickering Town Centre • Restaurants (PORT, Chuuk, etc.) • VIP Cineplex Movies • Future Porsche Experience Centre 	<ul style="list-style-type: none"> • Waterfront (Frenchman's Bay, West Park, Waterfront Trail) • Trails (Seaton, Greenbelt Cycling, Conservation Lands, Trans-Canada Trail) • Parks (Rouge Nat'l, Beachpark, Millenium Square, Petticoat Creek, Enchanted Trail- Kijimba Kind) • Wildlife (Bird watching, Salmon) • Tourism "Trails" (Anne and Maud Walking Trail) • Future Durham Meadow-way • Whitevale

ARTS AND CULTURE	
<ul style="list-style-type: none"> • Library Makers Space • Crock-a – Doodle • "Trails"- Haunted, Anne & Maud • Theatre- Herongate • Concerts- Durham Live 	<ul style="list-style-type: none"> • Music- Open Studio • PMV • Future Heritage & Community Centre • Public Art

FESTIVALS AND EVENTS

- | | |
|--|---|
| <ul style="list-style-type: none">• Pickering Museum Village• Dragonboat Racing• OPG Events• Music/ Waterfront Concerts• Food Truck Festival• Farmers Markets• Open studio Music | <ul style="list-style-type: none">• Annual Parades• RibFest• Artfest• JamFest• The Pic Casino Events• The Arena Concerts |
|--|---|

ACTIVITIES

- | | |
|--|---|
| <ul style="list-style-type: none">• Dining• Watersports / Boating• Skate boarding• Lawn Bowling | <ul style="list-style-type: none">• Shopping• Golf• Outdoor Activities (cycling, hiking)• Visiting Friends |
|--|---|

OTHER

- | | |
|---|---|
| <ul style="list-style-type: none">• Illuminated Bridge• Classic Cars• Film Sets• Bakeries• Gelato at Bellagios• Coffee Roaster• The Pie Guy• Big M Burgers | <ul style="list-style-type: none">• C'est What Brewery• Sports (Hockey, pickle ball)• Air BnB• Pacific Food Mkt• Access to TO• Go Station• Weddings |
|---|---|

Appendix IV

Visitation Data- City of Pickering

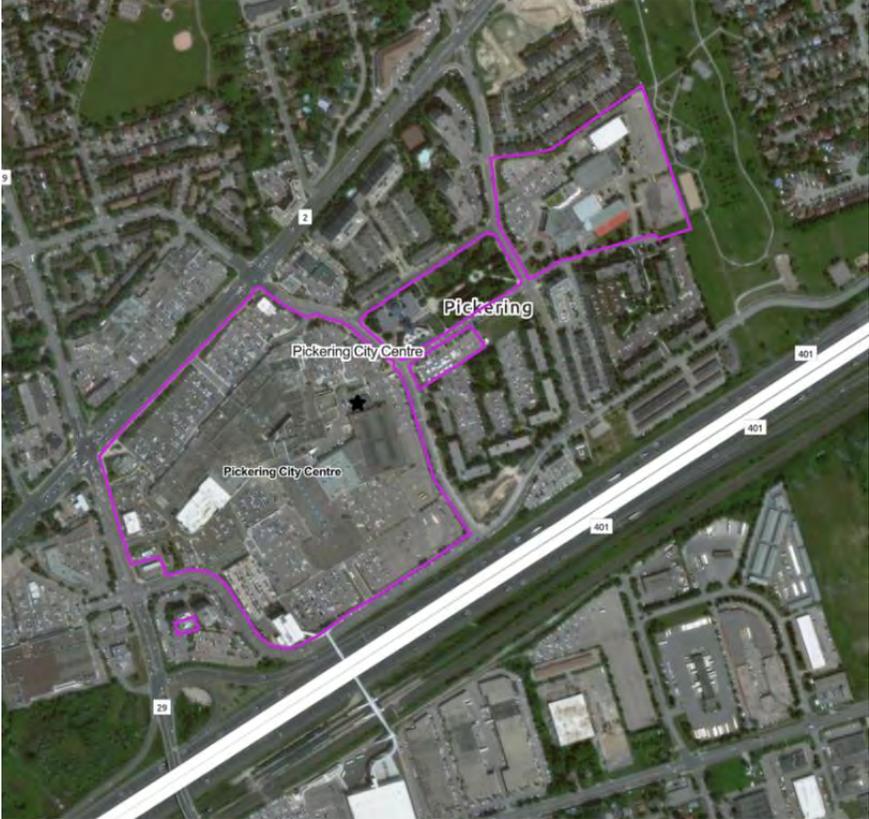
Research is important to understand the impact of tourism as a key economic driver and to inform business decisions and strategies. Tracking visitation numbers, understanding visitor profiles (demographics and psychographics) and monitoring trends can help gain insights into how many visitors are coming and who they are. Visitor research provides insight to support with the following:

- Identifying and validating the visitors / customers based on empirical data
- Maximizing Return on Investment (ROI) by targeting the right markets
- Increasing visitation by aligning products/services with customers/visitors
- Demonstrating the value and economic impact of tourism within a municipality/area

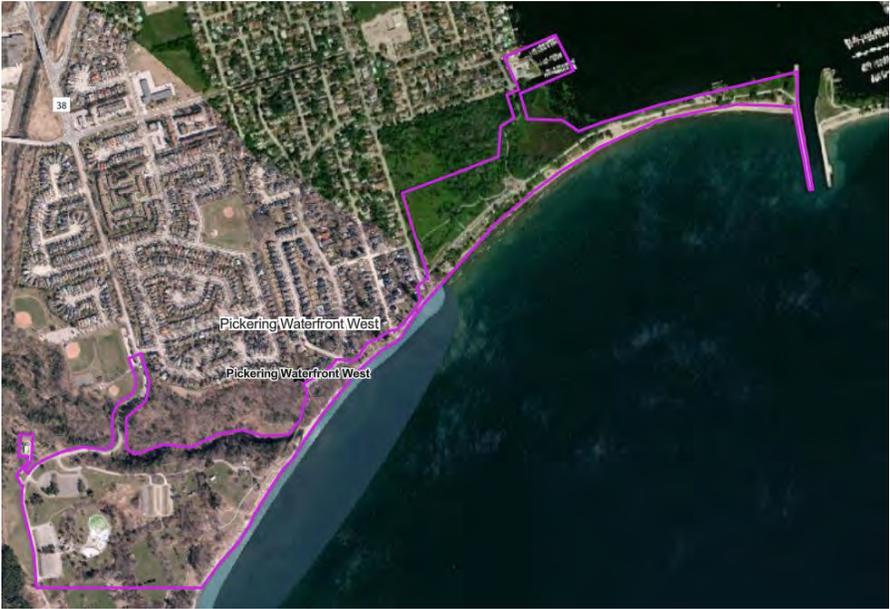
Research Process

Central Counties Tourism (RTO6) conducted a geo-fence data analysis for select areas in the City of Pickering using mobile phone data. The analysis included core visitor destination areas including the Pickering City Centre and Waterfront East and West. (see map below) Please note that the data excludes drive-through traffic and those who live or work in the selected areas.

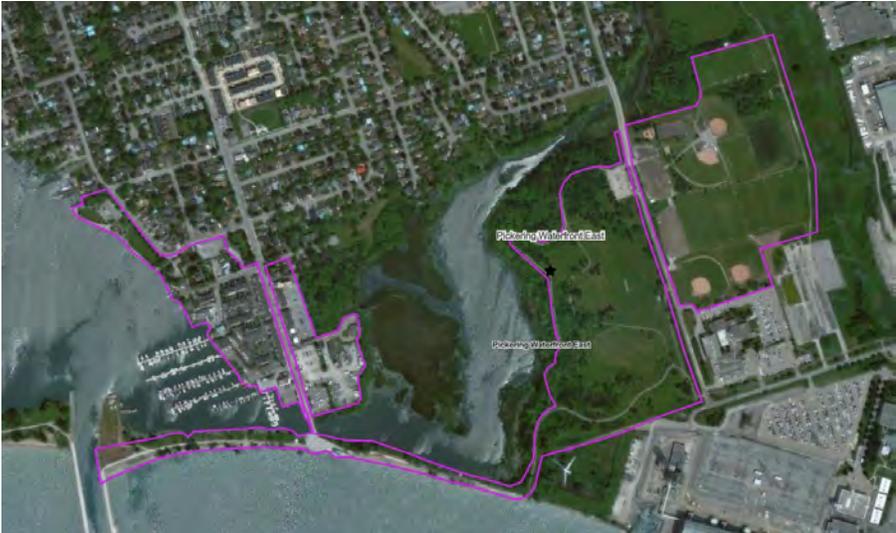
Pickering City Centre



Waterfront West



Waterfront East



Economic Impact from Visitation (Sample area in the City of Pickering (2022))

In 2022, of the total unique visitors to the three studied areas in Pickering, 12% were “tourists” (from 40+km away). The total number of visits by these tourists were as follows: the Waterfront West (34,555), Waterfront East (79,912) and Pickering City Centre (343,636) for a total of 458,107.

Using the Ministry’s Tourism Regional Economic Impact Model (TREIM), it is estimated that this visitation to Waterfront West contributed \$4M, Waterfront East contributed \$10.3 M, and Pickering City Centre contributed \$43M, in visitor spend for Durham Region.

Pickering 2022 Geo-Fence Data		# of Locals (0-40km)	% of Locals	# of Tourists (40+km)	% of Tourists	Total Count	% of Weekend Visits	Average number of Visits per Visitor (Locals)	Average number of Visits per Visitor (Tourists)	TREIM \$ Visitor Spend in Durham
Pickering Waterfront WEST	Unique Visitors	38,287	90.00%	4,254	10.00%	42,541	39.85%	11.46	8.12	\$4,043,976
	Total Visits	438,950	92.70%	34,555	7.30%	473,505				
	Weekend Visits	175,380	92.94%	13,329	7.06%	188,709				
	Weekdays Visits	263,570	92.55%	21,226	7.45%	284,796				
Pickering Waterfront EAST	Unique Visitors	85,801	88.99%	10,618	11.01%	96,419	35.72%	12.54	7.53	\$10,304,105
	Total Visits	1,075,853	93.09%	79,912	6.91%	1,155,765				
	Weekend Visits	383,700	92.94%	29,158	7.06%	412,858				
	Weekdays Visits	692,152	93.17%	50,755	6.83%	742,907				
Pickering City Centre	Unique Visitors	333,825	87.50%	47,682	12.50%	381,507	32.74%	17.60	7.21	\$42,902,328
	Total Visits	5,876,849	94.48%	343,636	5.52%	6,220,485				
	Weekend Visits	1,906,618	93.62%	129,935	6.38%	2,036,553				
	Weekdays Visits	3,970,231	94.89%	213,699	5.11%	4,183,930				

Appendix V

Visitor Market Profiles

Central Counties Tourism (RTO6) has identified six visitor profiles that were created using extensive research using numeric data, mobile data geofencing, postal code audit and Prizm segmentation profiles. Each profile was matched against Central Counties Tourism stakeholder businesses and organizations. This information allows tourism businesses to better target and market to their ideal consumer. (For full descriptions, visit https://centralcounties.ca/wp-content/uploads/CCT_Visitor_Profiles_B2B.pdf)

The six visitor profiles include:

Passionate Putter

Foodie Fanatics

Adventure Seeker

Art Lovers – Urbanite (Core)

Family Fun Seeker

Art Lovers – Community Explorer (Tactical)



Key Findings - Pickering Waterfront East Visitation 2022

Based on an analysis of the “tourists” (from 40 to 100 km away) who visited the Pickering Waterfront East in 2022, the most highly represented segments in the population were ‘Family Fun’ (35%), Adventure Seekers (28%) and ‘Passionate Putters’ / ‘Art lovers’ (tactical) both represented 9%. While there is an opportunity to attract more visitors within each of these segments, the easiest to attract (i.e., lowest hanging fruit) are likely the ‘Adventure Seekers’. This segment has the highest concentration (Index*) of the Waterfront East tourists, followed by the ‘Family Fun’ segment.

Though this sample is for Waterfront East, both the ‘Adventure Seekers’ and ‘Family Fun’ segments have the highest potential within the other two locations as well, and should be Pickering’s primary target markets to increase its visitation.

*Index is the ratio of the segments within your tourists vs segments of residents that live 40-100 km, and it is calculated by dividing the ‘%’ by ‘Base %’.

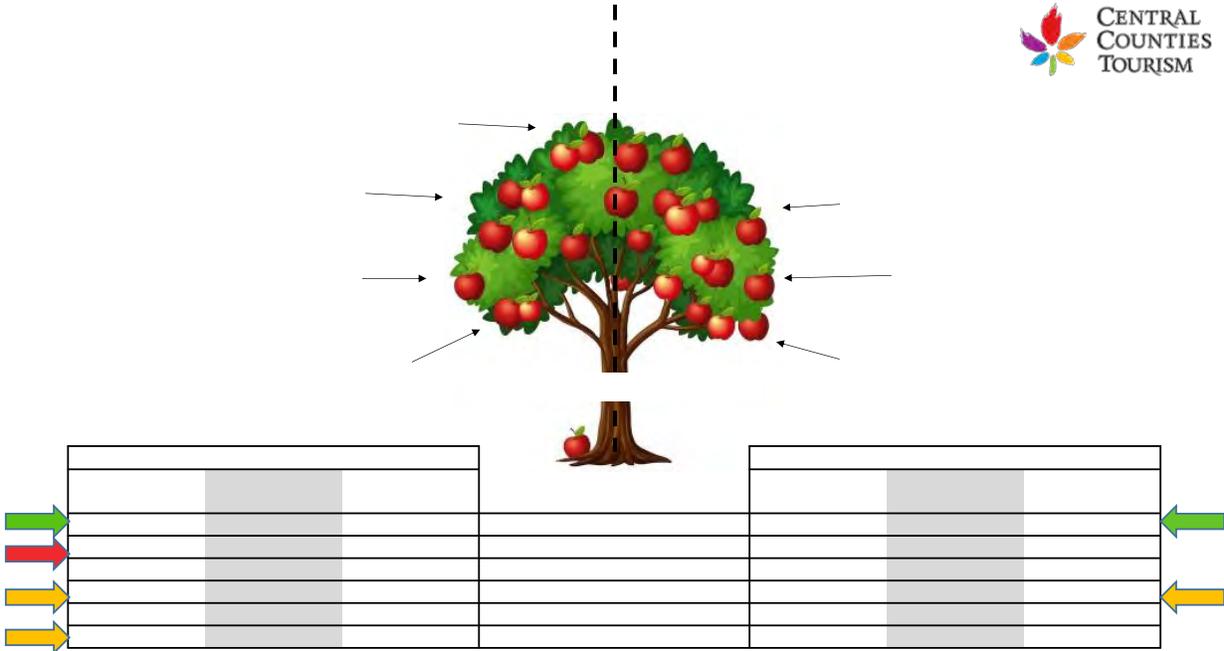
Pickering Waterfront East 2022 - Visitors CEL: Unique visitors						
Benchmark: Pickering Waterfront East (40-100 KM)						
Name	Count	%	Base Count	Base %	% Pen	Index
Adventure Seekers	2,079	27.88	564,781	14.48	0.37	193
Art Lovers - Urbanites (Core)	330	4.43	145,302	3.72	0.23	119
Art Lovers - Community Explorers (Tactical)	645	8.66	320,673	8.22	0.20	105
Family Fun	2,626	35.21	1,277,338	32.74	0.21	108
Foodie Fanatics	282	3.78	325,982	8.36	0.09	45
Passionate Putters	668	8.96	509,525	13.06	0.13	69

Pickering Waterfront West 2022 - Visitors CEL: Unique visitors						
Benchmark: Pickering Waterfront West - 40-100 km						
Name	Count	%	Base Count	Base %	% Pen	Index
Adventure Seekers	594	21.36	569,710	15.22	0.10	140
Art Lovers - Urbanites (Core)	123	4.42	126,779	3.39	0.10	131
Art Lovers - Community Explorers (Tactical)	231	8.32	322,484	8.61	0.07	97
Family Fun	864	31.10	1,230,627	32.88	0.07	95
Foodie Fanatics	80	2.87	314,189	8.39	0.03	34
Passionate Putters	456	16.42	508,188	13.58	0.09	121

Pickering City Centre 2022 - Visitors CEL: Unique visitors						
Benchmark: Pickering City Centre_FromGeofence - 40-100 km						
Name	Count	% Base	Count	Base %	% Pen	Index
Adventure Seekers	9,067	31.01	559,861	14.51	1.62	214
Art Lovers - Urbanites (Core)	1,347	4.61	149,779	3.88	0.90	119
Art Lovers - Community Explorers (Tactical)	1,666	5.70	314,857	8.16	0.53	70
Family Fun	7,122	24.35	1,260,829	32.69	0.56	75
Foodie Fanatics	2,053	7.02	322,847	8.37	0.64	84
Passionate Putters	3,136	10.72	497,402	12.89	0.63	83

Locals

Based on an analysis of the locals who visited the Pickering Waterfront East in 2022, the most highly represented segments in the population of locals were ‘Family Fun’ (31%) and ‘Passionate Putters’ (21%). The best opportunity to attract more locals is by targeting ‘Adventure Seekers’ as this group was more highly represented than they are in the average population.



Appendix VI

Visitor Readiness- Gap Analysis

CHALLENGES	OPPORTUNITIES
ENHANCE	
<ul style="list-style-type: none"> • Need more reasons to visit • Little business engagement / collaboration 	<ul style="list-style-type: none"> • Collaborate with businesses and across municipalities to build new experiences e.g. Networking events • Work with businesses to build out new visitor experiences/ “trails”
<ul style="list-style-type: none"> • Not enough Festivals / Events • Need more year-round activities 	<ul style="list-style-type: none"> • Leverage existing assets and build on them e.g. waterfront, trails • Host unique festivals /events (Consider IDEA Events) • Embrace winter tourism
<ul style="list-style-type: none"> • Limited Group Tourism- Need to re-engage group travel 	<ul style="list-style-type: none"> • Leverage sporting facilities to attract sport tourism events • Explore opportunity to elevate Education Tourism
WELCOME	
<ul style="list-style-type: none"> • Limited understanding of the Value of Tourism 	<ul style="list-style-type: none"> • Implement programs/promotions to share the importance of the visitor economy with residents/ staff/ council
<ul style="list-style-type: none"> • Lack of knowledge among residents of what the city offers • Residents are not advocates of Tourism 	<ul style="list-style-type: none"> • Improve resident sentiment • Engage locals to become visitor-friendly Ambassadors of Pickering
DEVELOP	
<ul style="list-style-type: none"> • Insufficient Parking • Limited Public Transport • No Wayfinding signage 	<ul style="list-style-type: none"> • Advocate for transportation improvements • Look for creative solutions for parking issues • Lead wayfinding strategy

<ul style="list-style-type: none"> • Few accommodation choices (especially N. Pickering) • Need public washrooms • No capacity to host large events 	<ul style="list-style-type: none"> • Build and present a business case to attract accommodation development • Explore the opportunity to develop a dedicated event space • Explore possibility to attract commercial presence in North Pickering
<ul style="list-style-type: none"> • Many visitors come to use trails, but investment in trails is limited • No tourism office to provide information to visitors who are coming 	<ul style="list-style-type: none"> • Develop ways to fund investment in trails and encourage trail users to patronize commercial areas. • Provide easy access to visitor information to encourage longer visits
DISTINGUISH	
<ul style="list-style-type: none"> • Lack of readily available visitor information (online and on-site) • No visitor contact information for direct messaging 	<ul style="list-style-type: none"> • Make up-to-date visitor information available • Implement push and pull communication strategy
<ul style="list-style-type: none"> • Limited promotion of bundled experiences • Lack of awareness of what Pickering offers & what makes it unique 	<ul style="list-style-type: none"> • Implement marketing (paid and earned media) to differentiate Pickering in the market • Highlight tourism assets (businesses, attractions)
<ul style="list-style-type: none"> • Pickering is not overtly promoting its support in embracing the movement for inclusion, diversity, equity, and accessibility (IDEA) 	<ul style="list-style-type: none"> • Showcase Pickering’s IDEA efforts to visitors e.g. reference the diverse demographic of visitors • Spotlight IDEA individuals in businesses and IDEA events in Pickering
SUPPORT	
<ul style="list-style-type: none"> • Limited \$ investment in Tourism for municipality and businesses need seed funding 	<ul style="list-style-type: none"> • Advocate for a municipal budget • Explore opportunities for new funding sources e.g. MAT, Events, Grants • Communicate the economic impact of the visitor economy across all staff departments and council
<ul style="list-style-type: none"> • No dedicated municipal staff to focus solely on tourism 	<ul style="list-style-type: none"> • Engage dedicated staff and community members to help drive the

	needs of the visitor economy forward and execute on Pickering's Visitor Plan
<ul style="list-style-type: none"> • Tourism is not currently a key priority for the municipality • The value of tourism is often not understood by staff, leadership & council 	<ul style="list-style-type: none"> • Elevate Tourism as one of the municipal strategic pillars • Educate about the value of the visitor economy
<ul style="list-style-type: none"> • Today there is a limited understanding of visitor insights to measure success and inform development and marketing. i.e. visitation, demographics, psychographics, and visitor satisfaction 	<ul style="list-style-type: none"> • Conduct and commission research to understand today's baseline and track visitation growth and areas for improvement over time. Use geofencing, postal code analysis and surveys.

Appendix VII

Community Tourism Survey

Residents, local business owners, and visitors were invited to provide feedback on the current tourism industry, local features and amenities found in the City of Pickering during a community tourism plan (CTP) survey on Let's Talk Pickering from **June 1, 2023 – September 6, 2023**. The survey was promoted on our social media channels, on our website and through a media release. The survey was also available to be completed from our Destination Pickering booth at multiple summer events, and on the Let's Talk Pickering webpage.

893 individuals visited the Let's Talk Pickering page, 723 individuals viewed the project or tools page, and 311 actively engaged and participated in the survey.

The full results of the survey can be found in the Project Report – Community Tourism Plan.

Project Report

01 June 2023 - 06 September 2023

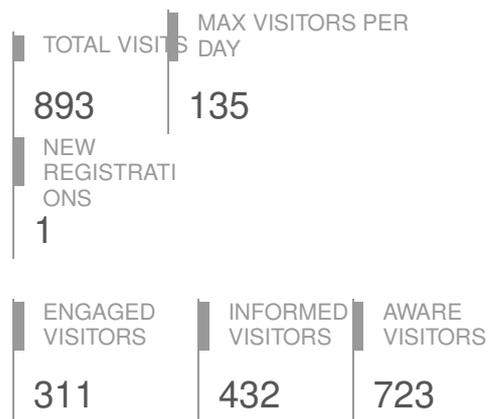
Let's Talk Pickering Community Tourism Plan



Visitors Summary

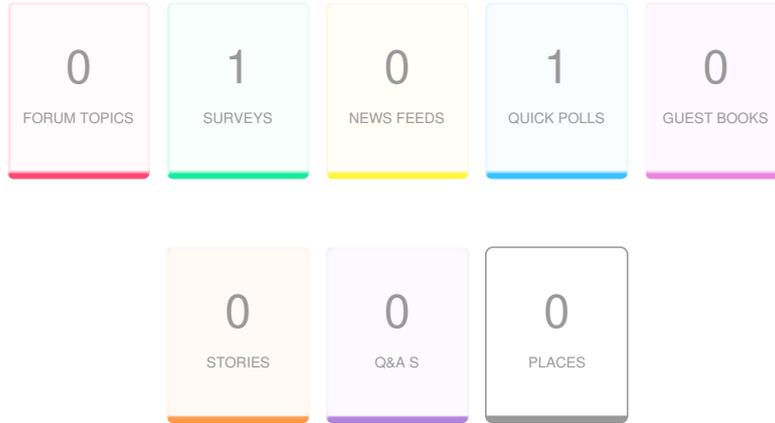


Highlights



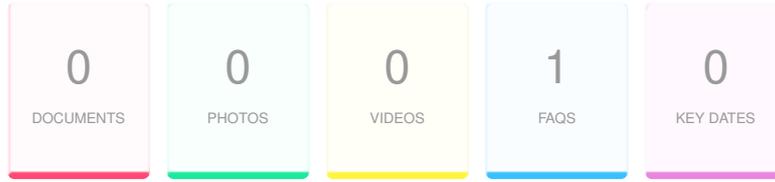
Aware Participants		Engaged Participants	
723		311	
Aware Actions Performed	Participants	Engaged Actions Performed	
Visited a Project or Tool Page	723	Registered	Unverified
Informed Participants	432	Anonymous	
Informed Actions Performed	Participants	Contributed on Forums	0
Viewed a video	0	Participated in Surveys	33
Viewed a photo	0	Contributed to Newsfeeds	0
Downloaded a document	0	Participated in Quick Polls	4
Visited the Key Dates page	8	Posted on Guestbooks	0
Visited an FAQ list Page	10	Contributed to Stories	0
Visited Instagram Page	0	Asked Questions	0
Visited Multiple Project Pages	110	Placed Pins on Places	0
Contributed to a tool (engaged)	311	Contributed to Ideas	1

ENGAGEMENT TOOLS SUMMARY



Tool Type	Engagement Tool Name	Tool Status	Visitors	Contributors		
				Registered	Unverified	Anonymous
Survey Tool	Community Tourism Plan Survey	Archived	414	33	0	276
Quick Poll	How often do you visit Pickering?	Published	5	4	0	0
Ideas	What brings you to Pickering?	Published	7	1	0	0

INFORMATION WIDGET SUMMARY



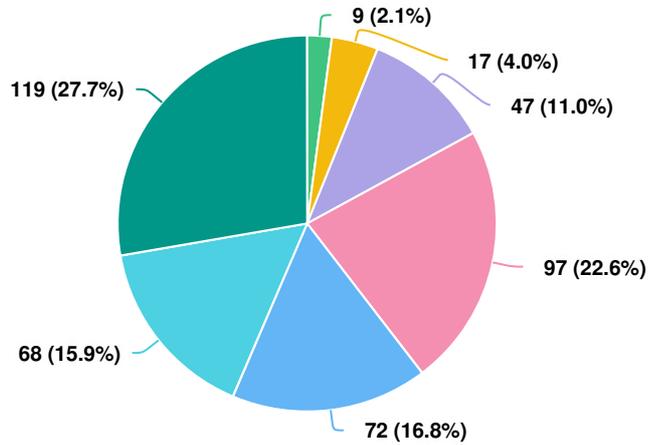
Widget Type	Engagement Tool Name	Visitors	Views/Downloads
Faqs	faqs	10	10
Key Dates	Key Date	8	8

ENGAGEMENT TOOL: SURVEY TOOL

Community Tourism Plan Survey

Visitors	414		
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What is your age?



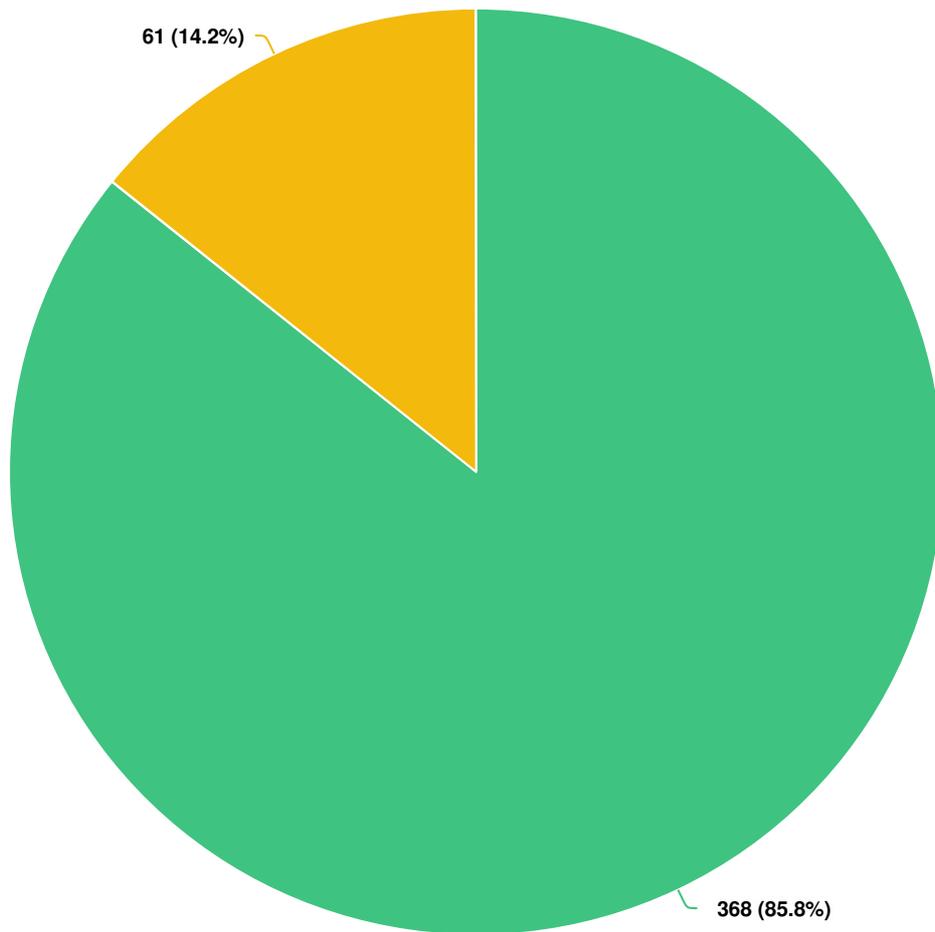
Question options

- Under 18
- 19 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65+

Mandatory Question (429 response(s))

Question type: Dropdown Question

Are you a resident of Pickering?



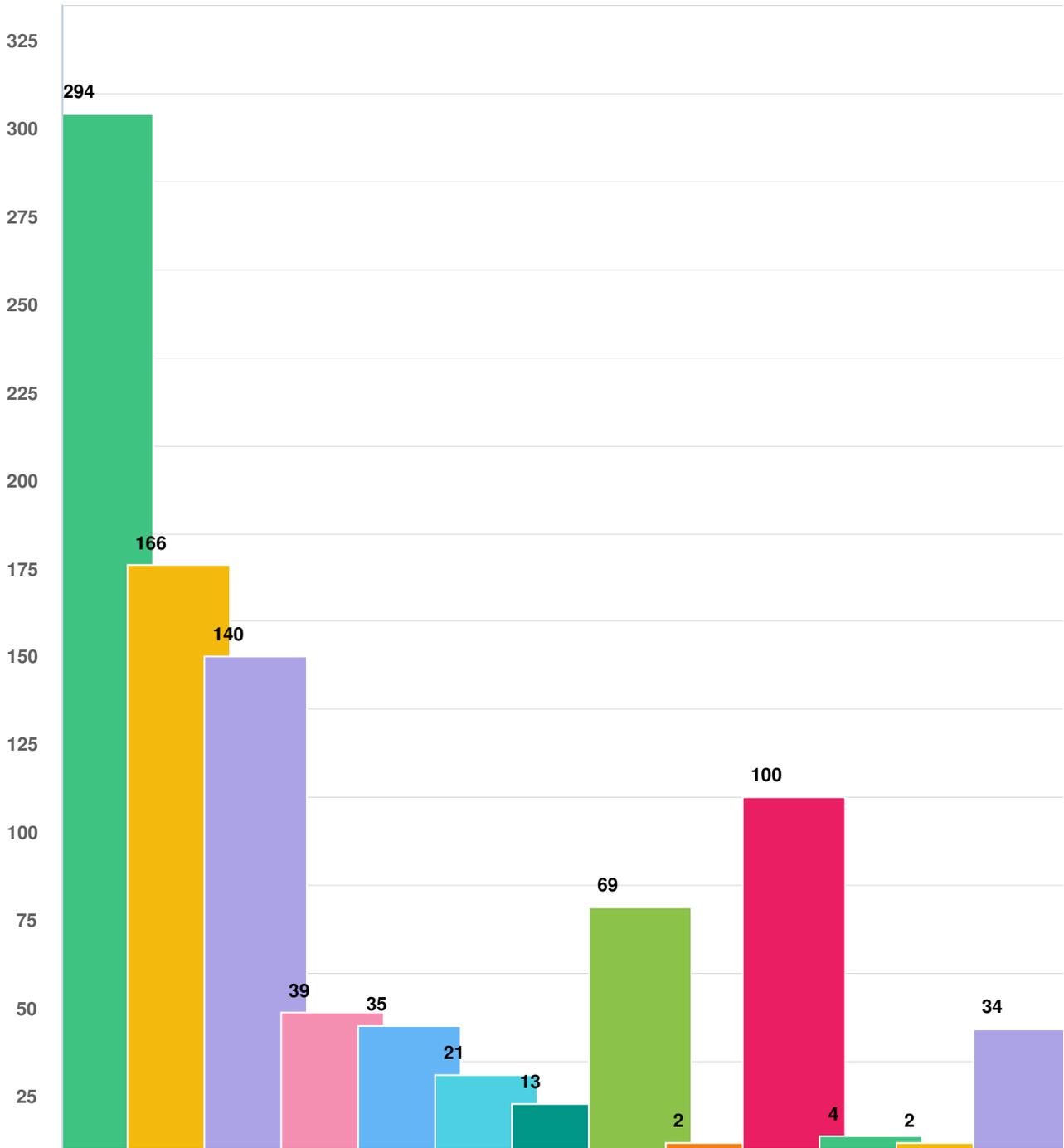
Question options

- Yes
- No

Mandatory Question (429 response(s))

Question type: Dropdown Question

If you have friends/family visiting, where are the first places you take them? (select top three)



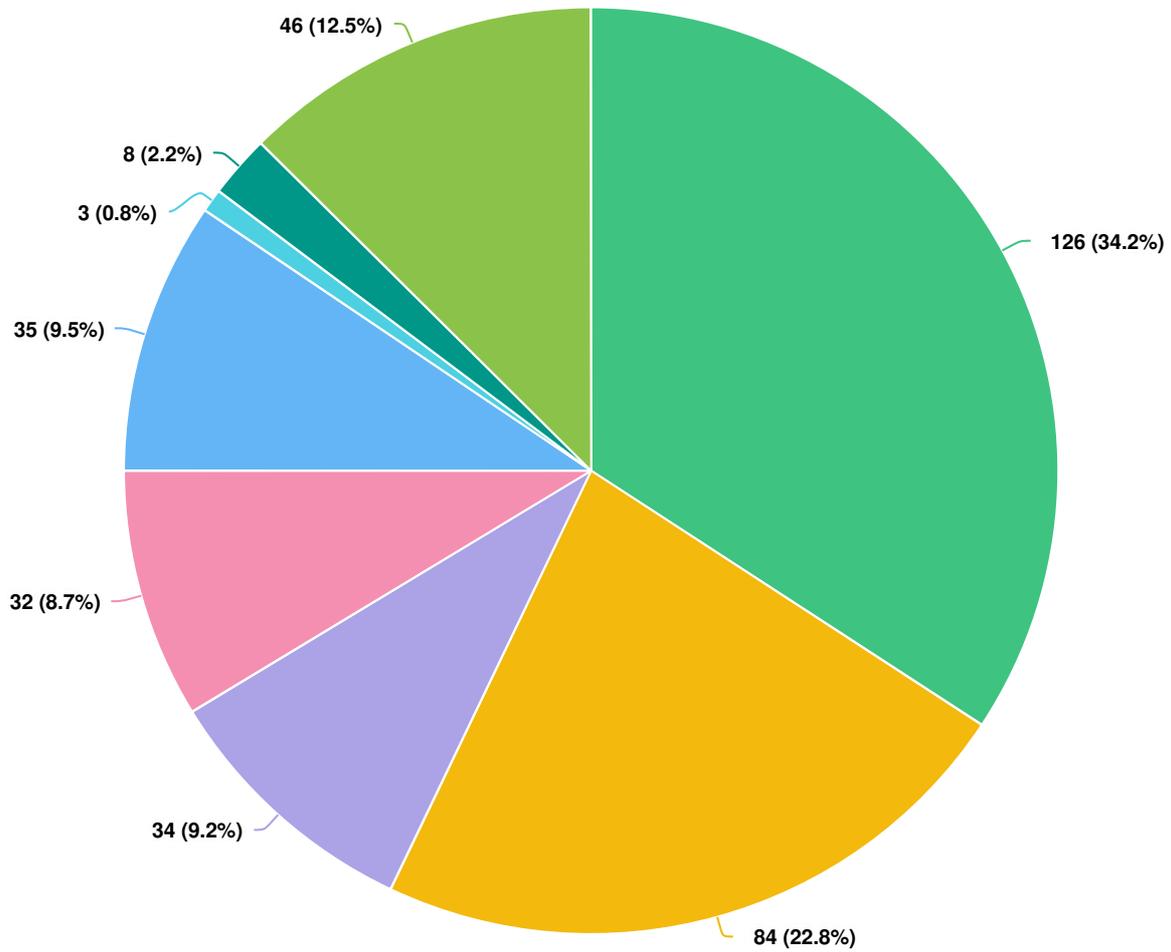
Question options

- Waterfront
 ● Parks/trails
 ● Restaurant
 ● Pickering Casino Resort
 ● Pickering Museum Village
- Pickering Public Library
 ● Chestnut Hill Developments Recreation Complex
 ● Shopping
 ● Pickering Soccer Centre
- Festivals/events
 ● Public art
 ● Filming
 ● Other (please specify)

Mandatory Question (368 response(s))

Question type: Checkbox Question

What is your favourite 'selfie spot' or photo location in Pickering?



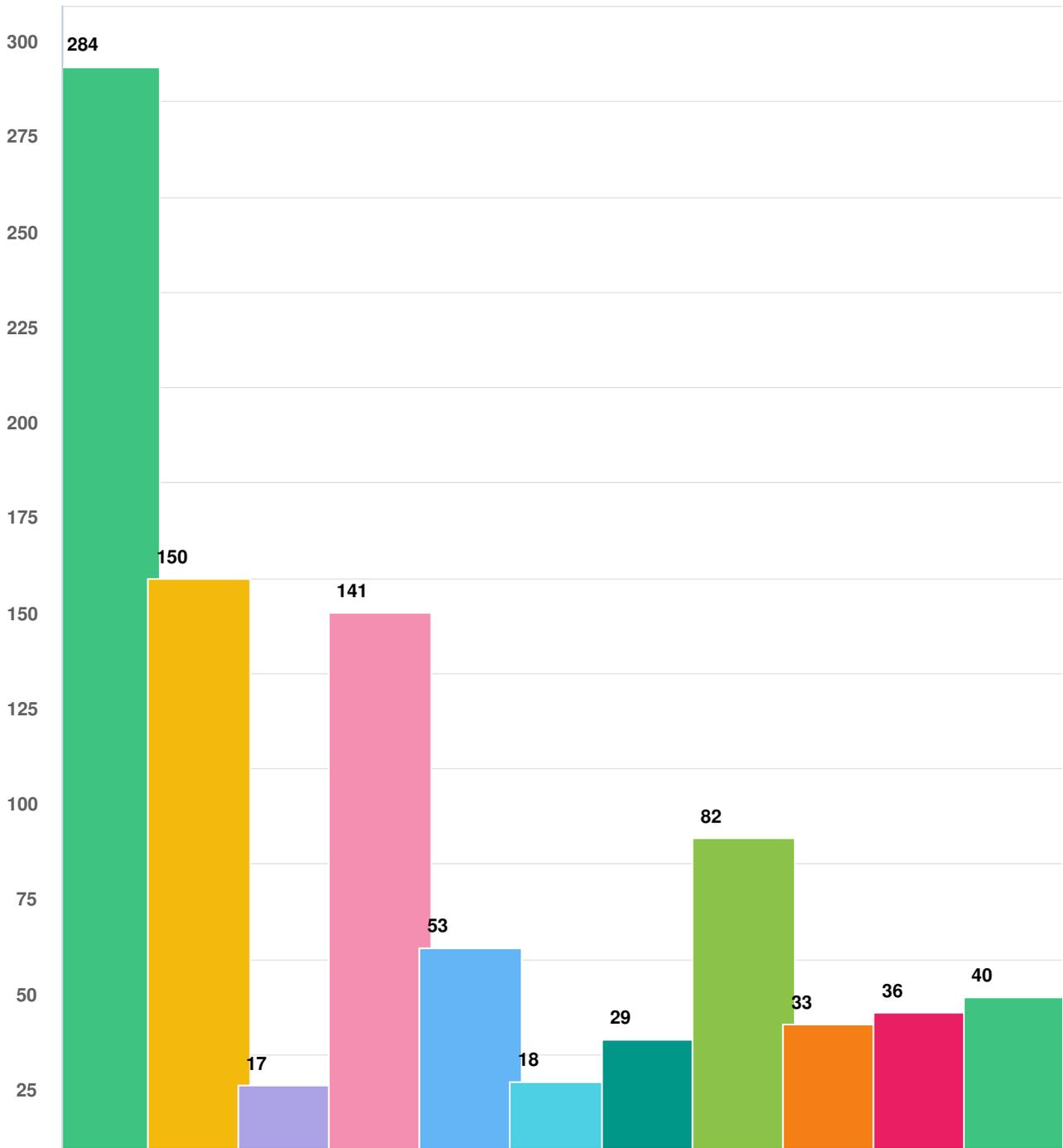
Question options

- Waterfront - Millennium Square (end of Liverpool Road)
- Waterfront - Rotary Frenchman's Bay West Park (end of West Shore Boulevard)
- Esplanade Park
- Seaton Trail
- Waterfront Trail
- Pickering Town Centre Installations
- Public art
- Other (please specify)

Mandatory Question (368 response(s))

Question type: Dropdown Question

What do you think attracts visitors to Pickering? (select top three)



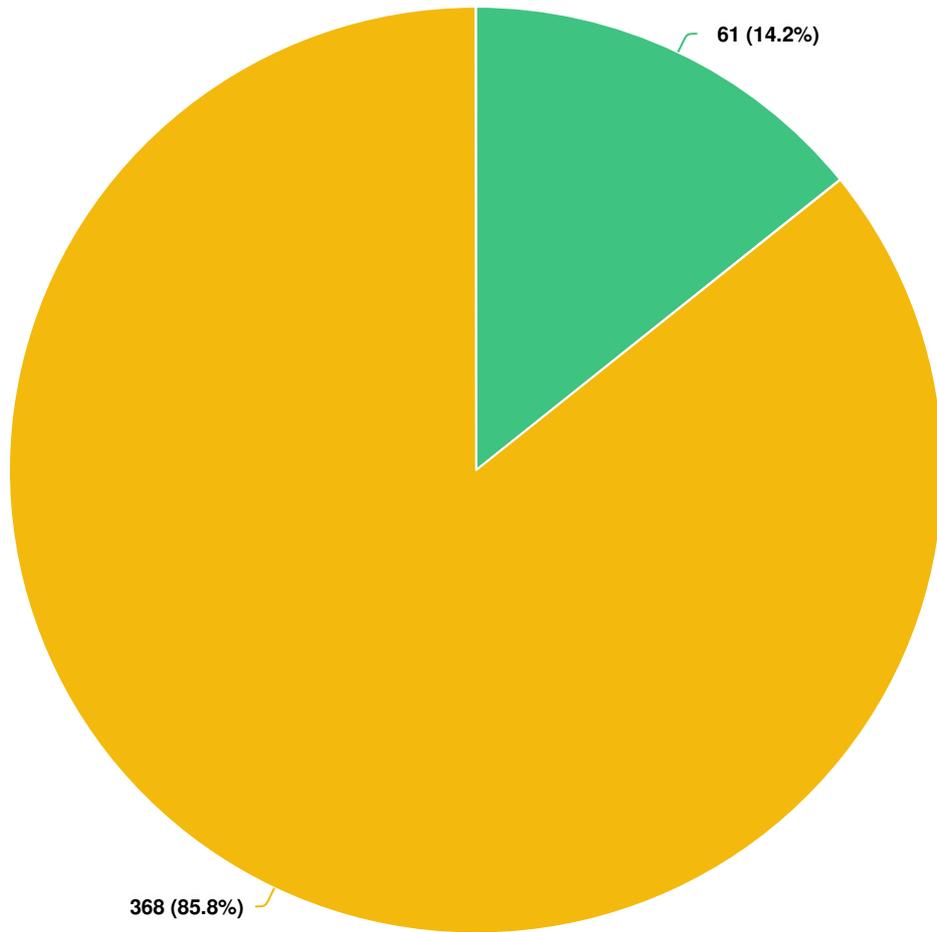
Question options

- Waterfront
 ● Parks/trails
● Entertainment
● Pickering Casino Resort
● Outdoor recreation activities
- Arts & Culture
 ● Pickering Museum Village
● Festivals/events
● Shopping
● Dining
- Other (please specify)

Mandatory Question (368 response(s))

Question type: Checkbox Question

Are you a visitor of Pickering?



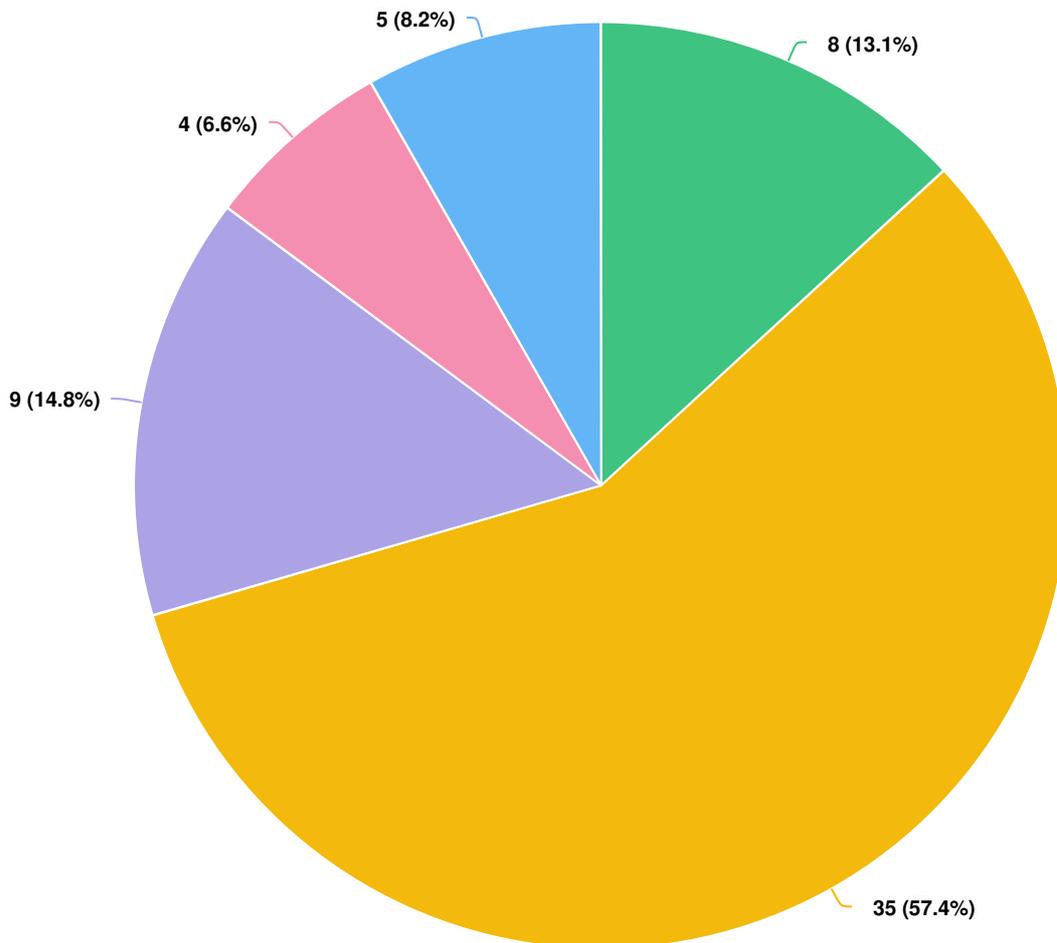
Question options

- Yes
- No, I'm a resident

Mandatory Question (429 response(s))

Question type: Dropdown Question

How often do you visit Pickering?



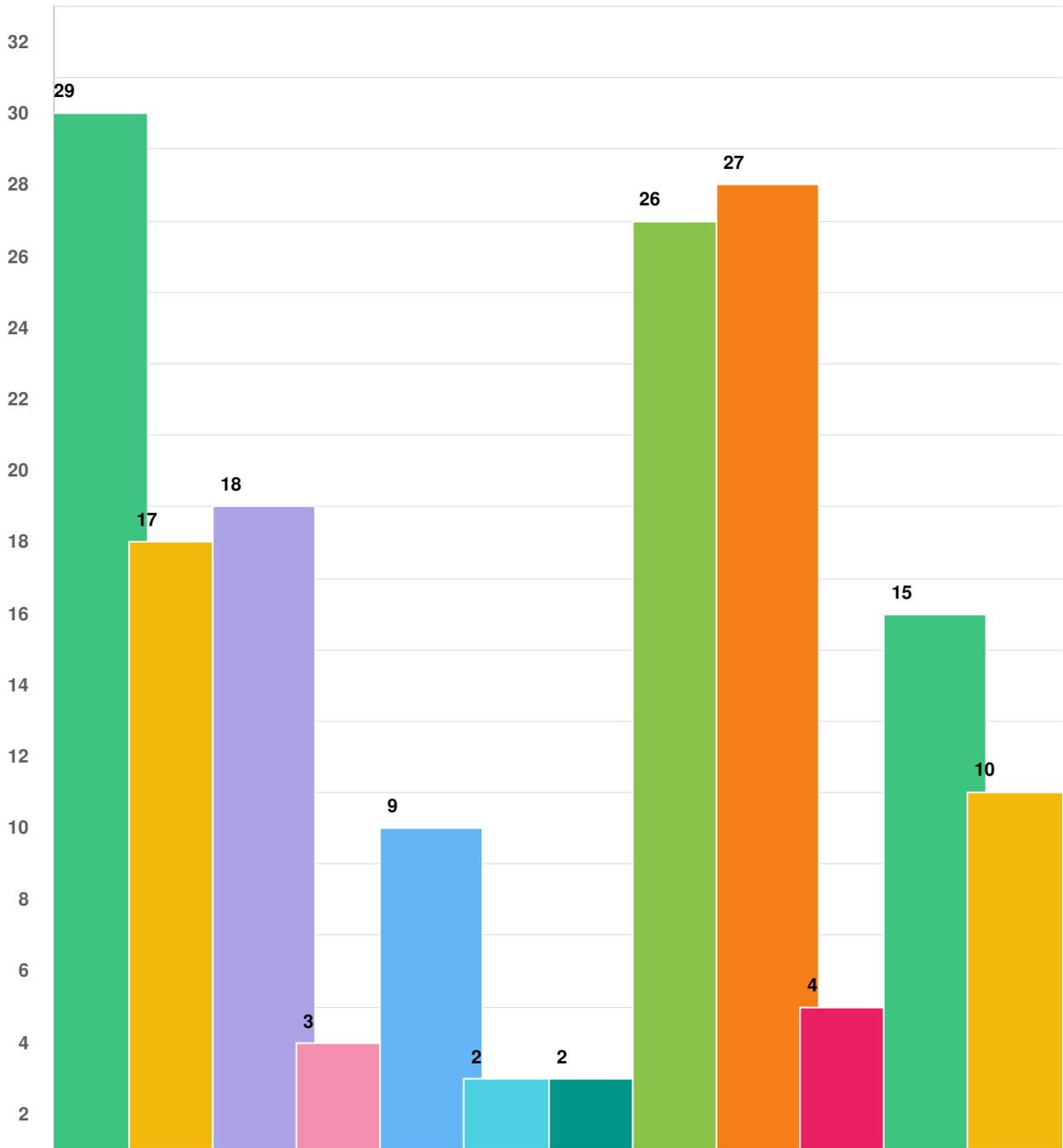
Question options

- Every day
- A few times a week
- Twice a month
- Once a month
- Very rarely/never

Mandatory Question (61 response(s))

Question type: Dropdown Question

As a visitor, what brings you to Pickering? (select up to three)



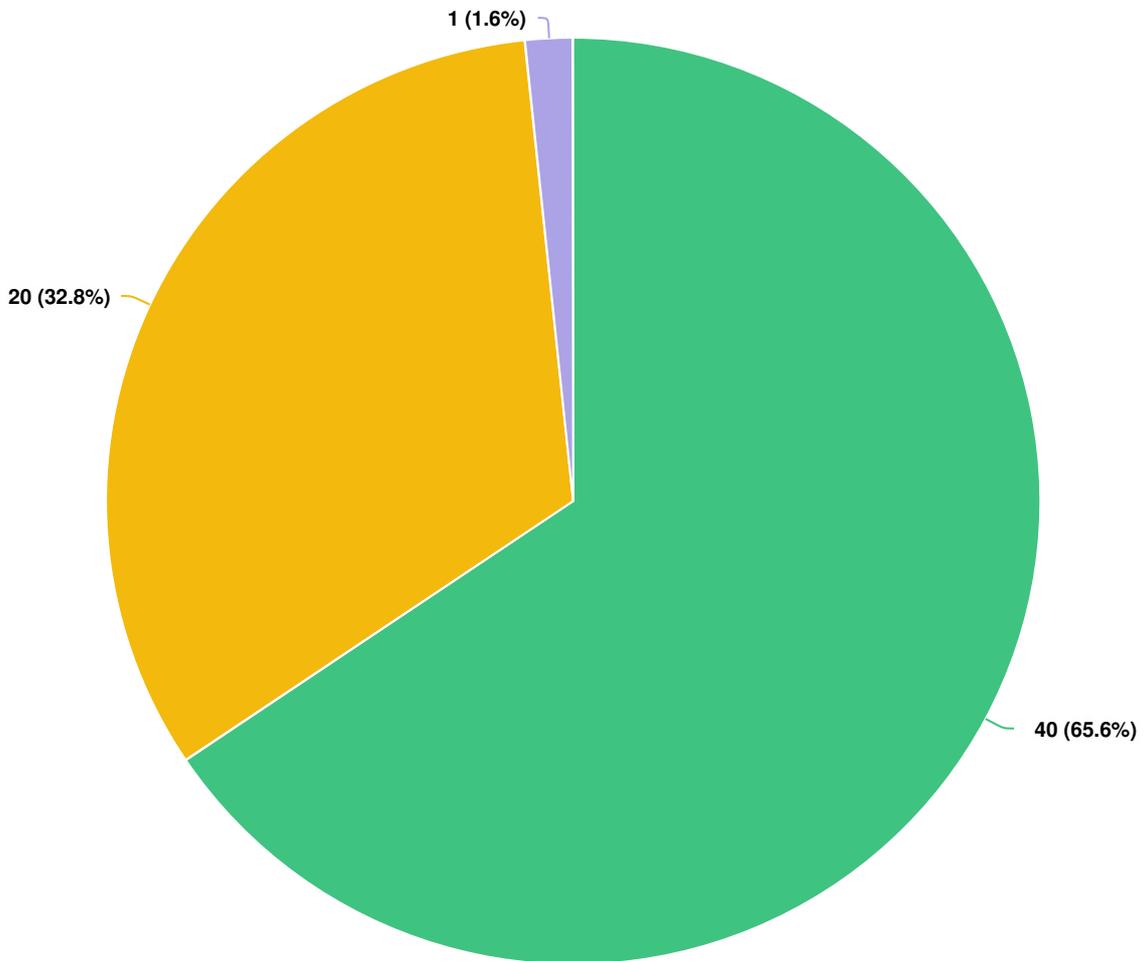
Question options

- Waterfront
 ● Parks/trails
 ● Restaurants
 ● Pickering Casino Resort
 ● Pickering Museum Village
- Pickering Public Library
 ● Chestnut Hill Developments Recreation Complex
 ● Shopping
 ● Festivals/events
- Public art
 ● Work
 ● Other (please specify)

Mandatory Question (61 response(s))

Question type: Checkbox Question

Where are you visiting from?



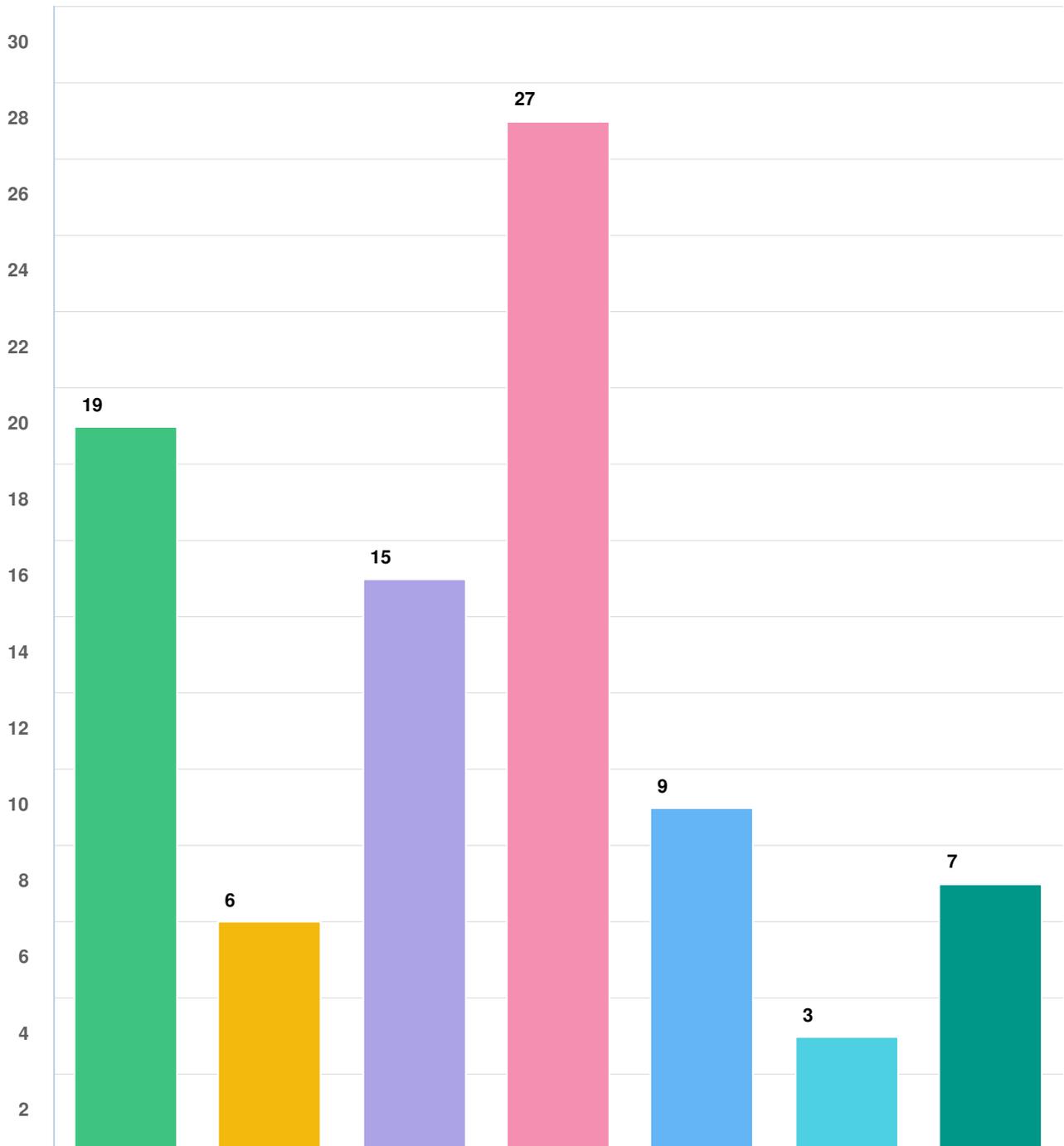
Question options

- Durham Region
- Outside of Durham Region
- Other (please specify)

Mandatory Question (61 response(s))

Question type: Dropdown Question

If any, what tourism barriers/challenges do you experience in Pickering? (select all that apply)



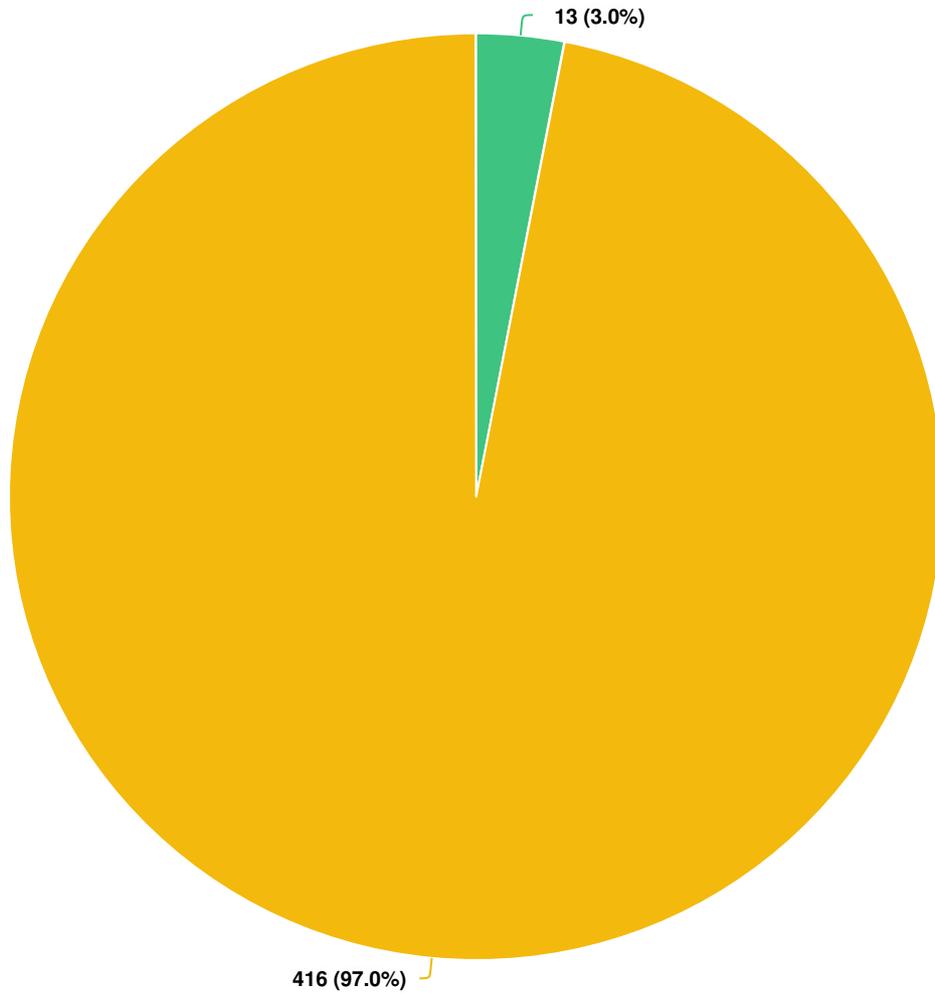
Question options

- Lack of attractions
- Lack of accommodations
- Lack of visitor information/packages about things to do in Pickering
- Parking/transit issues
- Too expensive
- Ongoing fear of travel/public outings due to COVID-19 pandemic
- Other (please specify)

Optional question (48 response(s), 381 skipped)

Question type: Checkbox Question

Do you own a business in Pickering?



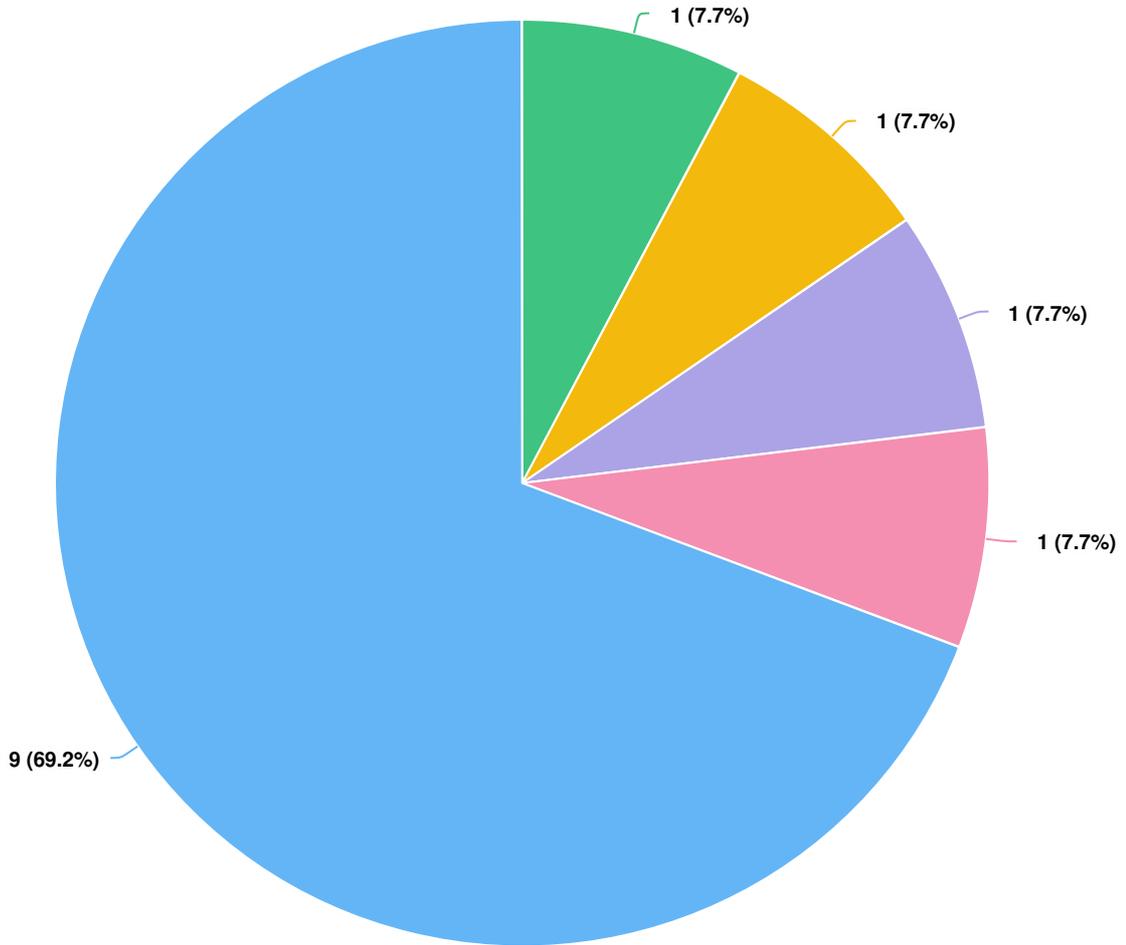
Question options

- Yes
- No

Mandatory Question (429 response(s))

Question type: Dropdown Question

What sector does your business fall under?



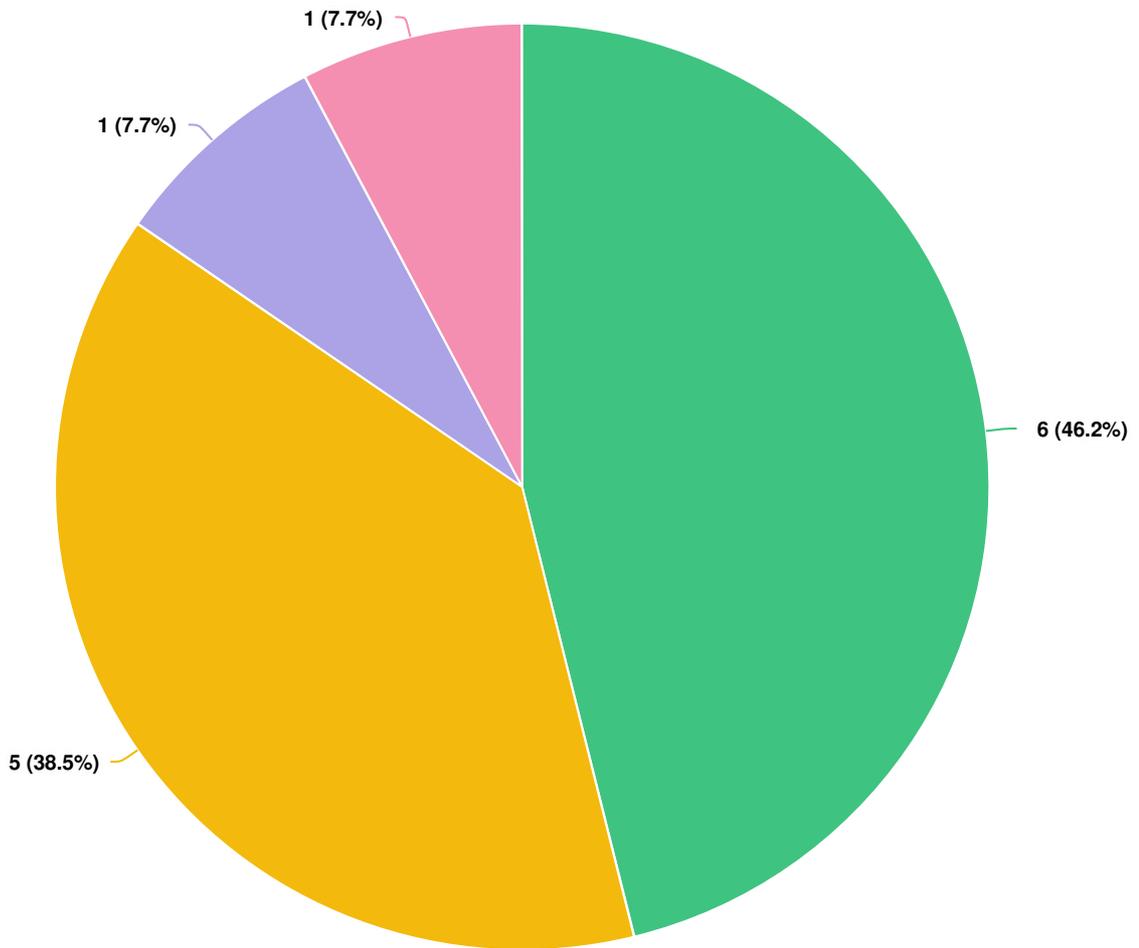
Question options

- Specialty Retail
- Recreation
- Arts & Culture
- Entertainment
- Other (please specify)

Mandatory Question (13 response(s))

Question type: Dropdown Question

Where are the majority of your visitors/customers coming from?



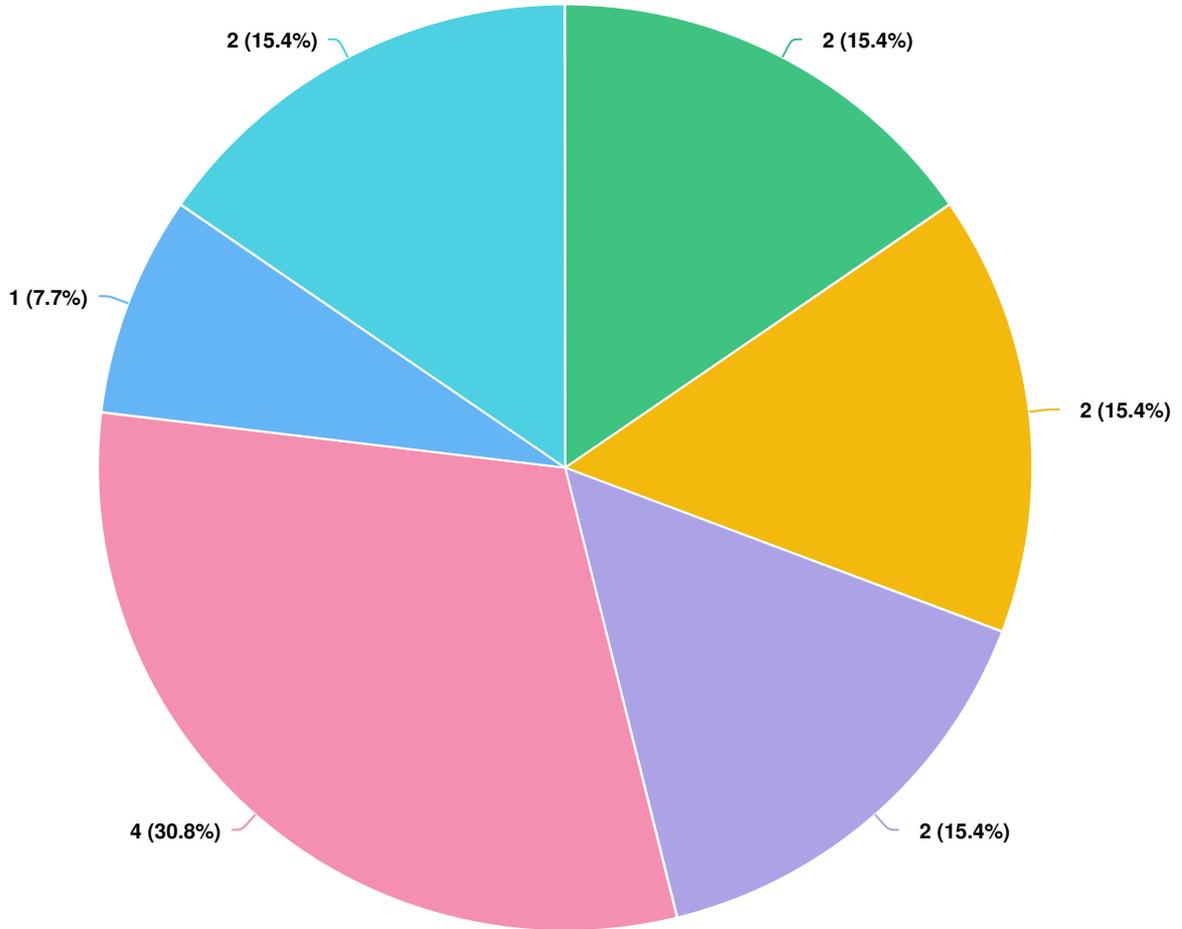
Question options

- Durham Region
- In Ontario, but outside of Durham Region
- Outside of Canada
- Other (please specify)

Mandatory Question (13 response(s))

Question type: Dropdown Question

What is the top age range your business is currently attracting?



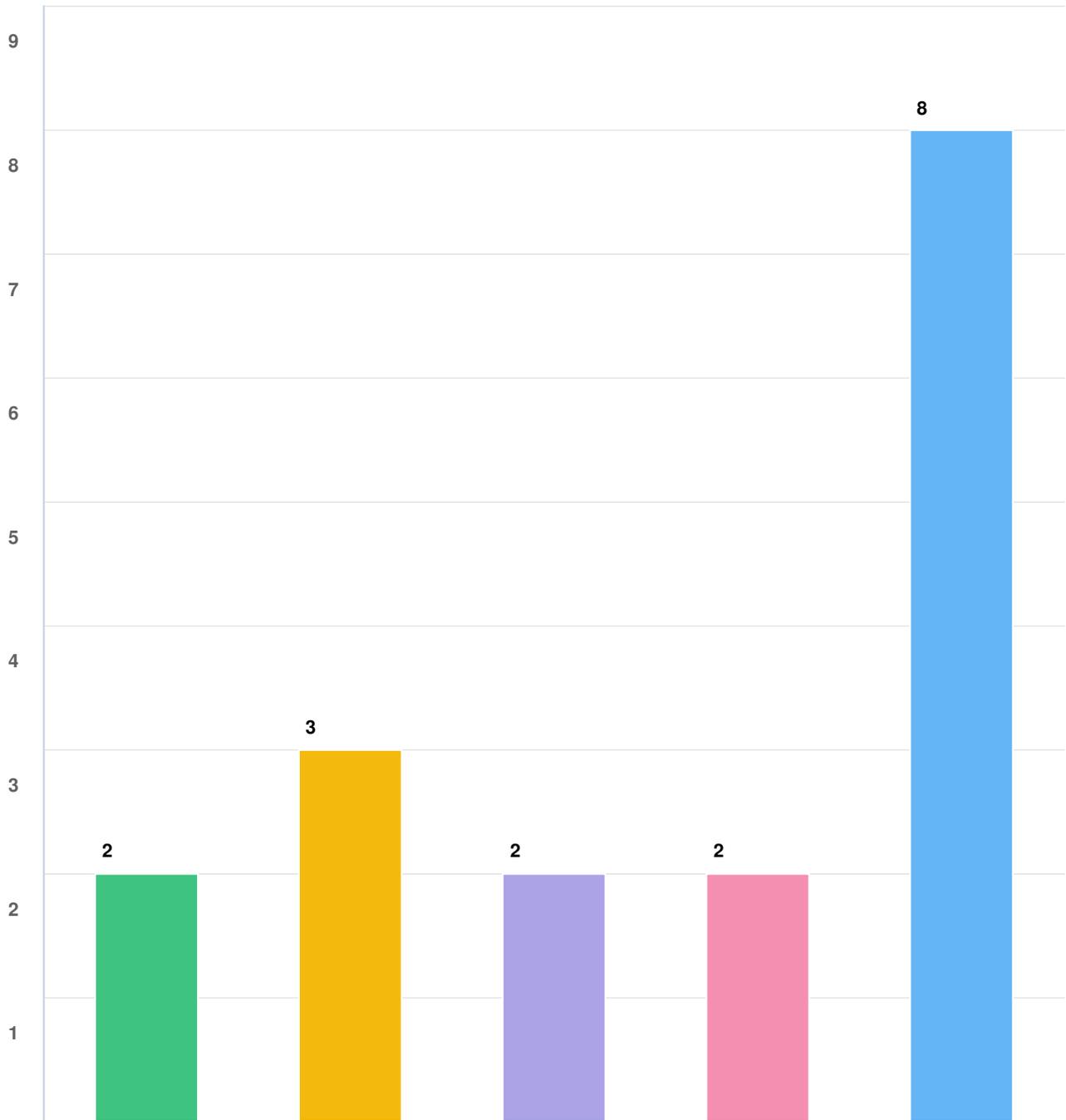
Question options

- 19 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65+

Mandatory Question (13 response(s))

Question type: Dropdown Question

Is there anything the City of Pickering is currently doing that helps your business attract more visitors?



Question options

- Events (Petapolooza, Farmers' Market, Summer Concerts, Artfest, Film(
- Marketing (business spotlights/social media features)
- Assistance through the Economic Development & Strategic Projects department
- Access to technology via the Pickering Public Library
- Other (please specify)

Mandatory Question (13 response(s))

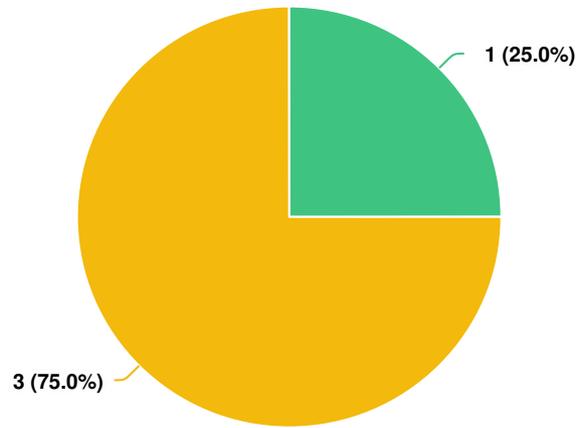
Question type: Checkbox Question

ENGAGEMENT TOOL: QUICK POLL

How often do you visit Pickering?

Visitors	5		
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How often do you visit Pickering?



Question options

- A few times each year
- I live here

Mandatory Question (4 response(s))

Question type: Radio Button Question

IDEAS

What brings you to Pickering?

Visitors 7		
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23 June 23 GreenRipple	Waterfront and green spaces I love coming back to the waterfront and the green spaces. Please preserve these areas and improve and maintain them.
VOTES 0	

23 June 23 GreenRipple	Accessibility for people with disabilities Please always include accessibility considerations in your tourism plans.
VOTES 0	

Appendix VIII

Committee Engagement

A draft of the Community Visitor Plan underwent review during the Cultural Advisory Committee meeting on January 16, 2024. No further comments were received at that time. Subsequently, the most recent draft of the plan was reviewed during the Waterfront Visionary Advisory Committee meeting on April 15, 2024 and at the Accessibility Advisory Committee meeting on April 17, 2024 for comment.