



RIDEAU HERITAGE ROUTE TOURISM ASSOCIATION TOURISM ECONOMIC IMPACT AND PRODUCT FEASIBILITY STUDY

September 30, 2017

Public Release: November 1, 2017

Funding Partners:

Grenville Community Futures Development Corporation

Parks Canada

Rideau Heritage Route Tourism Association



This project is funded by the Government of Canada through the Federal Economic Development Agency for Southern Ontario.



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EXECUTIVE SUMMARY



BDO Canada conducted an economic impact assessment of tourism on the Rideau Canal, a product feasibility study of creating a world-class paddling destination, and organizational assessment of the Rideau Heritage Route. The stated objective of these studies are to fully realize the world-class potential of the Rideau Canal to maximize the value of tourism to local economies.

The results of the economic impact assessment demonstrate that the tourism industry in the region has a significant impact on the local economy. The tourism sector contributes \$695 million annually to the economies of the 11 municipal members of the Rideau Heritage Route Tourism Association, representing 2.2% of Ontario's tourism economy. Of this contribution, approximately \$309 million came from the communities directly along the Rideau Corridor. However, some communities benefit from tourism more than others. For those that do benefit from tourism, some communities benefit more from tourism on the Rideau Canal than others as well.

Total employment in the regional tourism industry grew from 7,467 jobs in 2011 to 8,744 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the region are: full-service restaurants and limited-service eating places; other amusement and recreation industries; traveller accommodation; gambling industries; and independent artists, writer and performers. Despite being the largest employer in the tourism industry, the full-service restaurant and limited-service eating places sector would have grown faster if not for the region's significant competitive disadvantages in the sector.

Of the 1,277 increase in the region's tourism jobs between 2011 and 2016, 415 jobs can be attributed to the region's competitive advantages. The main contributors to job growth due to competitive advantages are: traveller accommodation; other amusement and recreation industries; independent artists, writers and performers; and recreational vehicle (RV) parks and recreational camps.

If the larger urban centres of Ottawa and Kingston are included in these figures, then over 85% of the jobs in the tourism industry along the Rideau Corridor can be attributed to these two municipalities. Including Ottawa and Kingston, it is estimated that the tourism industry contributed approximately \$5.5 billion to the corridor's GDP in 2016. Total employment in the corridor's tourism industry grew from 58,559 jobs in 2011 to 69,649 jobs in 2016. Overall, the total corridor's tourism industry added 11,090 jobs between 2011 and 2016. Of this increase, 4,036 jobs can be attributed to the total corridor's competitive advantages.

The findings from the product feasibility study demonstrate that the Rideau Heritage Route comprises a number of assets that can be used to promote paddling tourism on the canal. The UNESCO world heritage designation, an excellent setting for canoeing, and the history of the region provide the opportunity to create a signature tourism experience. The proposed world-class paddling destination is determined to be feasible. The region also enjoys many tourism assets unrelated to paddling, such as a vibrant agricultural sector, cruiser boat rentals, and a beautiful natural setting. Both groups of assets provide opportunities to enhance the tourism market of the Rideau Heritage Route.

Historically the leadership of tourism on the Rideau Heritage Route has proven to be a bottleneck in achieving the economic development potential of the region. With the introduction of the Regional Tourism organizations, a myriad of tourism organizations exist, many with overlapping roles and responsibilities, which complicated the governance and execution of promising tourism initiatives.

This study makes the recommendation that the Rideau Heritage Route should explore making paddling along the Rideau Corridor a designated Canadian Signature Experience by Destination Canada. Furthermore, a strategy should be developed to determine how to combine water and land-based activities in a seamless tourism brand and experience. Achieving these objectives will require strong leadership from the Rideau Heritage Route Tourism Association to coordinate the relevant tourism stakeholders in the region. A transition to a revised governance and funding model is also recommended.

SECTION 1: PROJECT DESCRIPTION

The Rideau Heritage Route Tourism Association (RHRTA) actively contributes to creating a climate that stimulates tourism investment, tourism development, marketing, and other activities along the Rideau Corridor. The association supports activities in tourism product development and the promotion of the Rideau Corridor that increase business revenues through visitor expenditures. The 11 members of the RHRTA that participated in the development of this feasibility study are: United Counties of Leeds and Grenville, Lanark County, Town of Smiths Falls, Township of Rideau Lakes, Township of South Frontenac, Municipality of North Grenville, Village of Westport, Township of Leeds and the 1000 Islands, Village of Merrickville-Wolford, Township of Drummond/North Elmsley, and Township of Tay Valley.

The Rideau Canal is a National Historic Site of Canada, a UNESCO World Heritage Site, and designated Canadian Heritage River that is 202 km from Kingston to Ottawa, 30+ launch ramps, 47 lock stations and 24 lock stations with more than 20 marinas along the route and over 1,091 km of shoreline. The canal is maintained and operated by Parks Canada. RHRTA wanted to explore leveraging these assets to promote tourism in the region and assess the feasibility of being considered a world-class paddling destination. To this end, RHRTA engaged the consulting firm BDO Canada to conduct an economic impact assessment of tourism in the region, a product feasibility study for a world-class paddling destination on the Rideau Canal, and an organizational assessment of the Rideau Heritage Route. The primary challenge of the engagement was to fully realize the world-class potential of the Rideau Canal to maximize the value of tourism in local communities.

The first phase of the project involved a wide-ranging literature review of relevant documentation provided by the member municipalities of the RHRTA. Extensive interviews were conducted with stakeholders from each municipal member of the RHRTA to gather information on the impact of tourism and the Rideau Canal on their local economies. A workshop was held with these municipal stakeholders to share ideas on economic assets in the tourism industry. Economic data on the tourism industry from Statistics Canada was then collected and analyzed using a location quotient analysis, shift-share analysis, and input-output model. The results from the first phase of the project are provided in Section 3 of this study. The raw data collected for the economic impact assessment is provided in Appendix C.

The second phase of the project included additional interviews with private tourism business operators and Parks Canada. A second workshop was conducted with the tourism business operators and a third workshop was open to the general public. The information collected from the stakeholder consultations was analyzed and used for the product feasibility study and organizational assessment sections of this study. Recommendations have been made for RHRTA to pursue the most feasible strategy for creating a world-class paddling destination on the Rideau Canal.

In addition, the market potential of tourism in the region can also be expanded with a number of valuable land-based tourism assets and opportunities. Developing these opportunities may enhance the appeal of the Rideau Heritage Route to certain target market demographics that are not seeking adventure or outdoor tourism. Therefore, the most feasible strategy is to target a broad market of different groups of tourists seeking different experiences by promoting the many different tourist assets in the region. Using this strategy,

the Rideau Canal can be considered the hub of the tourism strategy, attracting a core group of tourists, with other land-based tourism assets developed as spokes to create a harmonized tourism brand and experience.

SECTION 2: ECONOMIC IMPACT ASSESSMENT

Summary of Economic Impact Assessment Section

Findings:

- *The tourism sector in the region enjoys many competitive advantages and has a large economic impact*
- *The tourism sector in the region related to the Rideau Canal is very advantageous for some communities, and less so for others*
- *The tourism sector contributes \$695 million toward the GDP of the 11 municipalities that are members of the RHRTA*
- *Together with Ottawa and Kingston, the tourism sector contributes \$5.5 billion toward the GDP of the economies along the Rideau Heritage Route*

Assumptions:

- *Statistics Canada's tourism sector basket is representative of the tourism industry in the region*

Gaps:

- *Statistics Canada uses 4-digit NAICS codes, resulting in the inability to analyze the data at the level of the smallest tourism subsectors*

This section provides an economic impact assessment to determine the value of the tourism industry for the region and baseline information to identify and quantify the value of the Rideau Canal to local municipal economies. Economic impact data was gathered using the Ontario Ministry of Agriculture, Food and Rural Affairs' (OMAFRA) Analyst tool to quantify the economic impact of tourism on the region. Three analytical tools were used to determine the economic impact of tourism and the Rideau Canal: shift-share analysis, location quotient analysis, and input-output analysis.

A shift-share analysis focuses on changes that have taken place in the industrial composition of the community. Shift-share techniques aid in understanding the key economic industries and sectors in a region. The shift-share analysis in this report uses three techniques:

- **National Growth Effect:** Measures the change in employment in selected tourism sectors in Canada that can be attributed to the rate of growth for all industries in Canada.
- **Industrial Mix Effect:** Measures the change in employment in selected tourism sectors in Canada that can be attributed to whether or not that sector is growing or declining in Canada.
- **Competitive Effect:** Measures how many jobs are created in selected tourism sectors in a community due to competitive advantages. This technique determines the level of employment growth that can be

attributed to local factors as opposed to growth in the national economy or growth in a tourism sector generally.

Location quotient (LQ) focuses on quantifying how concentrated a particular tourism sector is in a region compared to Canada as a whole. It can reveal what makes a particular region unique in comparison to the national average and what economic industries/sectors are clustered in a certain community.

Location Quotient Label Interpretation¹:

Location Quotient	Label	Interpretation
Less than 0.75	Low	Regional needs are probably not being met by the sector resulting in an import of goods and services in this industry group.
0.75 to 1.24	Medium	Most local needs are being met by the sector. The region will probably be both importing and exporting goods and services in this industry group.
1.25 to 4.99	High	The industry group is serving needs beyond the border, exporting goods and services produced to other regions or provinces.
More than 5.0	Very High	This is indicative of a very high level of local dependence on the sector, typically in a “single-industry” community

An input-output model depicts industry relationships within an economy, showing how output from one industrial sector may become an input to another industrial sector. The analysis represents the different interdependencies between economic sectors and the potential for spillover effects from one industry to another.

For the purposes of this report, the tourism industry is defined and operationalized using the North American Industry Classification System (NAICS) codes that will comprise a basket of tourism sectors. In order to maintain the reliability of the data, several tourism industries have been grouped together. This grouping is based on Statistics Canada’s Human Resource Module of the Tourism Satellite Account. The tourism industry groups of this module include:

- Air transportation
- All other transportation (includes rail, water, bus, taxi, and vehicle rental)
- Accommodation
- Food and beverage services
- Recreation and entertainment
- Travel services

¹ “Foreign Direct Investment Competitive Assessment,” Outlook Market Research.

Following is a detailed list of the tourism industries that are used in the Economic Impact Assessment, including their NAICS codes:

NAICS Code	Tourism Sector	Sector Definition
Air transportation		
4811	Scheduled air transport	This industry group comprises establishments primarily engaged in transporting passengers and/or goods by aircraft, over regular routes and on regular schedules. Establishments in this industry have less flexibility with respect to choice of airports, hours of operation, load factors and similar operational characteristics than do establishments in 4812, Non-scheduled air transportation.
4812	Non-scheduled air transport	This industry group comprises establishments primarily engaged in the non-scheduled air transportation of passengers and/or goods. Establishments in this industry have more flexibility with respect to choice of airports, hours of operation, load factors and similar operational characteristics than do establishments in 4811, Scheduled air transportation. Establishments primarily engaged in providing specialty air transportation or flying services using small, general-purpose aircraft are included.
All other transportation industries		
4821	Rail transportation	This industry group comprises establishments primarily engaged in operating railways. Establishments primarily engaged in the operation of long-haul or mainline railways, short-haul railways and passenger railways are included.
4831	Deep sea, coastal and great lakes water transportation	This industry group comprises establishments primarily engaged in deep sea, coastal and Great Lakes water transportation of freight and passengers. The St. Lawrence Seaway is considered to be part of the Great Lakes system. Establishments that operate ocean-going cruise ships are included.
4832	Inland water transportation	This industry group comprises establishments primarily engaged in the inland water transportation of freight and passengers. Transportation within harbours is included.
4851	Urban transit systems	This industry group comprises establishments primarily engaged in operating local and suburban mass passenger transit systems. Such transportation may involve the use of one or more modes of transport including light rail, subways and streetcars, as well as buses. These establishments operate over fixed routes and schedules, and allow passengers to pay on a per-trip basis (whether or not they also accept payment methods such as monthly passes).
4852	Interurban and rural bus transportation	This industry group comprises establishments primarily engaged in providing passenger transportation, principally outside a single municipality and its suburban areas, primarily by bus. These establishments operate over fixed routes and schedules, and charge a per-trip fee.

NAICS Code	Tourism Sector	Sector Definition
4853	Taxi and limousine service	This industry group comprises establishments primarily engaged in providing passenger transportation by taxi and limousine.
4854	School and employee bus transportation	This industry group comprises establishments primarily engaged in operating buses and other motor vehicles to transport pupils to and from school or employees to and from work. These establishments operate over fixed routes and schedules, but do not charge a per-trip fee.
4855	Charter bus industry	This industry group comprises establishments primarily engaged in providing charter bus services. These establishments do not operate over fixed routes and schedules, and rent the entire vehicle, rather than individual seats.
4859	Other transit and ground passenger transportation	This industry group comprises establishments, not classified to any other industry group, primarily engaged in providing shuttle services to airports and similar facilities, special needs transportation services and other transit and ground passenger transport. Shuttle services included in this industry group are those that use vans and/or buses as a means of transport. They usually travel on fixed routes and service particular hotels or carriers. Special needs transportation establishments use conventional or specially converted vehicles to provide passenger transportation to the infirm, elderly or handicapped.
4871	Scenic and sightseeing transportation, land	This industry group comprises establishments primarily engaged in providing scenic and sightseeing transportation on land, such as steam train excursions and horse-drawn sightseeing rides.
4872	Scenic and sightseeing transportation, water	This industry group comprises establishments primarily engaged in providing scenic and sightseeing transportation on water, such as sightseeing, dinner cruises or air-boat rides. These establishments often use vintage or specialized transportation equipment. The services provided are local in nature, usually involving same-day return. Establishments that provide charter fishing services are included.
5321	Automotive equipment rental and leasing	This industry group comprises establishments primarily engaged in renting or leasing vehicles, such as passenger cars, passenger vans, trucks, truck tractors, buses, semi-trailers, utility trailers and recreational vehicles (RVs), without drivers. These establishments generally operate from a retail-like facility; some offer only short-term rental, others only longer-term leases and some provide both type of services.
Accommodation		
7211	Traveller accommodation	This industry group comprises establishments primarily engaged in providing short-term lodging in facilities such as hotels, motor hotels, resorts, motels, casino hotels, bed and breakfast homes, and housekeeping cottages and cabins. These establishments may offer food and beverage services, recreational services, conference rooms and convention services, laundry services, parking and other

NAICS Code	Tourism Sector	Sector Definition
		services.
7212	Recreational vehicle (RV) parks and recreational camps	This industry group comprises establishments primarily engaged in operating recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of vacation and adventure camps. These establishments cater to outdoor enthusiasts and are characterized by the type of accommodation and by the nature and the range of recreational facilities and activities provided to their clients.
Food and beverage services		
7224	Drinking places (alcoholic beverages)	This industry group comprises establishments, known as bars, taverns or drinking places, primarily engaged in preparing and serving alcoholic beverages for immediate consumption. These establishments may also provide limited food services.
7225	Full-service restaurants and limited-service eating places	This industry group comprises establishments primarily engaged in providing food services to patrons who order and are served while seated and pay after eating, or who order or select items at a counter, food bar or cafeteria line (or order by telephone) and pay before eating. This industry group includes drinking places that primarily serve food.
Recreation and entertainment		
5121	Motion picture and video industry	This industry group comprises establishments primarily engaged in producing and/or distributing motion pictures, videos, television programs or commercials; exhibiting motion pictures or providing post-production and related services.
7111	Performing arts companies	This industry group comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses, singers, dancers, musical groups and artists, and other performing artists. Examples of establishments in this industry group are theatre companies, dance companies, musical groups and artists, circuses and ice-skating shows.
7112	Spectator sports	This industry group comprises professional, semi-professional, or amateur sports clubs primarily engaged in presenting sporting events before an audience. These establishments may or may not operate the facility for presenting these events. Independent professional, semi-professional or amateur athletes (in their role as athletes), and operators of race tracks are also included.
7115	Independent artists, writers and performers	This industry group comprises independent individuals (freelance) primarily engaged in performing in artistic productions, creating artistic and cultural works or productions, or providing technical expertise necessary for these productions. Independent celebrities, such as athletes, engaging in endorsement, speaking and similar services, are included.

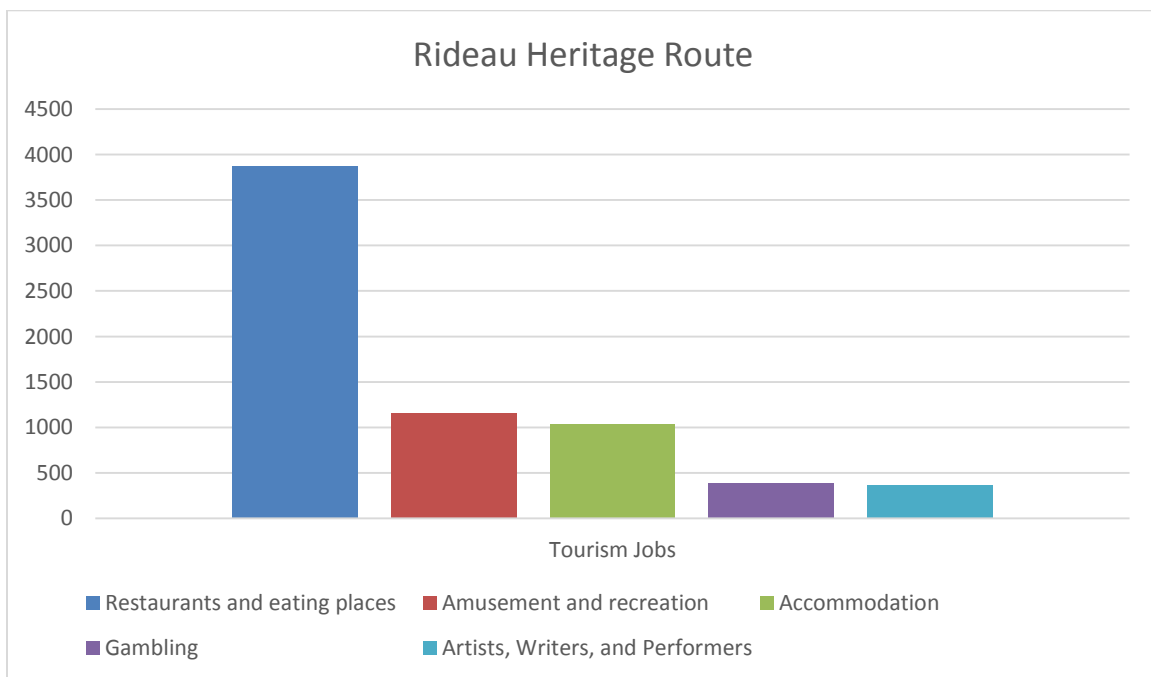
NAICS Code	Tourism Sector	Sector Definition
7121	Heritage institutions	This industry group comprises establishments primarily engaged in preserving and exhibiting objects, sites and natural wonders of historical, cultural and educational value.
7131	Amusement parks and arcades	This industry group comprises establishments primarily engaged in operating amusement parks, amusement arcades and parlours.
7132	Gambling industries	This industry group comprises establishments primarily engaged in operating gambling facilities, such as casinos, bingo halls and video gaming terminals; or providing gambling services, such as lotteries and off-track betting.
7139	Other amusement and recreation industries	This industry group comprises establishments, not classified to any other industry group, primarily engaged in operating outdoor or indoor facilities, or providing services that enable patrons to participate in sports and recreational activities. Examples of establishments in this industry group are golf courses, skiing facilities, marinas, recreational, sports and fitness centres, and bowling centres.
Travel services		
5615	Travel arrangement and reservation services	This industry group comprises establishments primarily engaged in travel arrangement and reservation services. Examples of establishments in this industry group are tourist and travel agencies; travel tour operators and wholesale operators; convention and visitors' bureaus; airline, bus, railroad and steamship ticket offices; sports and theatrical ticket offices; and airline, hotel and restaurant reservation offices.

This economic impact assessment will use three levels of analysis: the regional level, the county level, and the municipal level. The entire Rideau Heritage Route will be analyzed, as well as only those census subdivisions which are on the Rideau Canal (with and without Ottawa and Kingston). At the county level, the United Counties of Leeds and Grenville and Lanark County will be analyzed, including an analysis of only those census subdivisions which are on the Rideau Canal. At the municipal level, each of the remaining nine municipal members of the RHRTA are assessed.

1) Rideau Heritage Route

Regional Economic Impact

Regional economic impact comprises the 11 members of the Rideau Heritage Route Tourism Association, including all municipalities associated with county members.² It is estimated that the tourism industry contributed approximately \$695 million to regional Gross Domestic Product (GDP)³ in 2016, representing 2.2% of Ontario's tourism economy.⁴ Total employment in the regional tourism industry grew from 7,467 jobs in 2011 to 8,744 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the region are: full-service restaurants and limited-service eating places (3,869 jobs); other amusement and recreation industries (1,156 jobs); traveller accommodation (1,035 jobs); gambling industries (385 jobs); and independent artists, writer and performers (365 jobs). It should be noted that despite being the largest employer in the tourism industry, the full-service restaurant and limited-service eating places sector would have grown faster if not for the region's significant competitive disadvantages in the sector (-149 jobs).



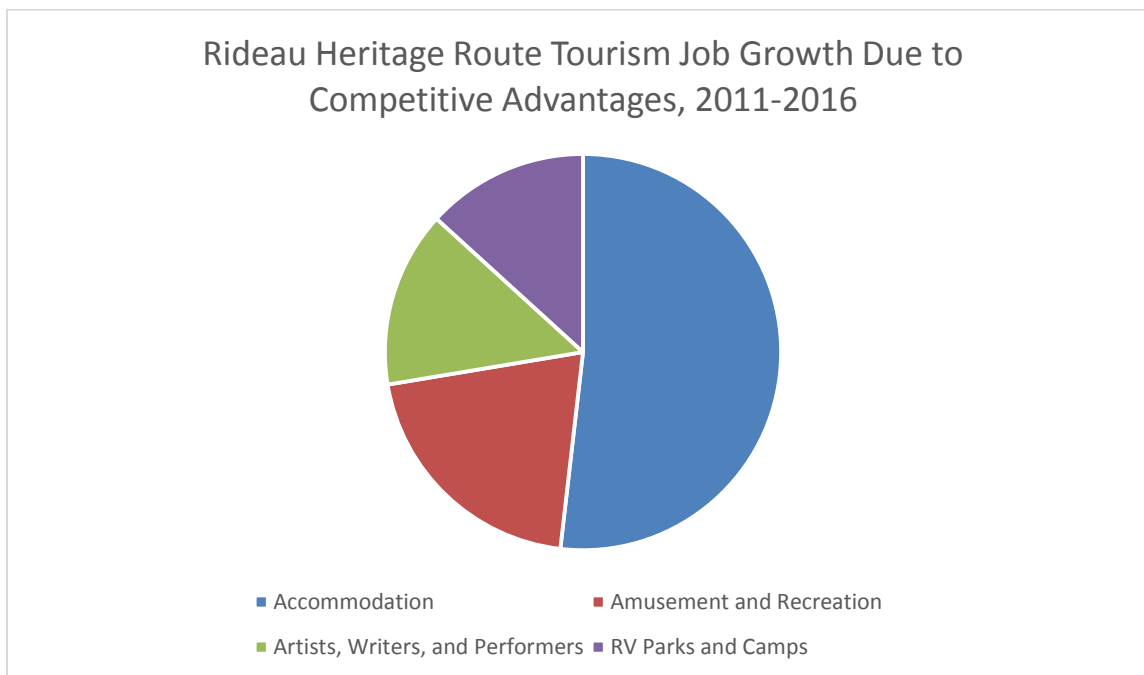
Overall, the regional tourism industry added 1,277 jobs between 2011 and 2016. Of this increase, 420 jobs can be attributed to national economic growth and 442 jobs can be attributed to growth in the tourism industry. As a result, 415 jobs can be attributed to the region's competitive advantages. The main contributors to job

² Census subdivisions included are: Edwardsburgh/Cardinal, Augusta, Prescott, Elizabethtown-Kitley, Brockville, Front of Yonge, Leeds and the Thousand Islands, Gananoque, Wesport, Rideau Lakes, Athens, Merrickville-Wolford, North Grenville, Montague, Smiths Falls, Drummond/North Elmsley, Tay Valley, Perth, Beckwith, Carleton Place, Mississippi Mills, Lanark Highlands, and South Frontenac.

³ Gross Domestic Product (GDP) is the total value of goods produced and services provided in a geographic area during one year.

⁴ http://www.mtc.gov.on.ca/en/research/quick_facts/facts.shtml

growth due to competitive advantages are: traveller accommodation (227 jobs); other amusement and recreation industries (90 jobs); independent artists, writers and performers (63 jobs); and recreational vehicle (RV) parks and recreational camps (58 jobs).



The region demonstrates a significant concentration of jobs in the ‘scenic and sightseeing transportation, water’ tourism sector, representing a location quotient of 5.95. However, a number of these jobs may be related to other bodies of water in the region, not specifically the Rideau Canal. The region also demonstrates a concentration of ground transportation sectors, including: interurban and rural bus transportation (3.94 LQ); other transit and ground passenger transportation (3.61 LQ); and RV parks and recreational camps (2.51 LQ). Heritage institutions (2.39 LQ) and gambling industries (2.38 LQ) also tend to be concentrated in the region.

Water and air transportation sectors in the tourism industry tend to have the deepest economic interdependencies and greatest impact on other regional industries. Deep sea, coastal and Great Lakes water transportation has the largest impact (2.0904) on other industrial sectors, followed by non-scheduled air transportation (1.9392) and scheduled air transportation (1.9030). Inland water transportation (1.7810) also has a significant impact on other economic sectors.

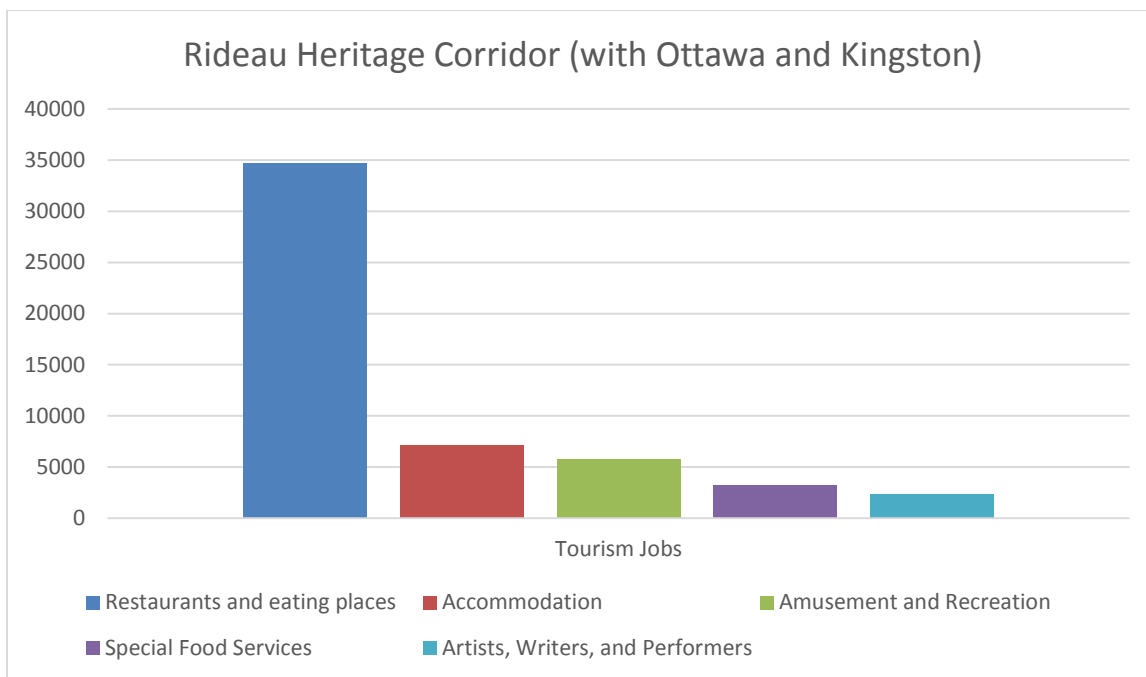
Despite a high location quotient, ‘scenic and sightseeing transportation, water’ does not have a comparatively large impact (1.1900) on other sectors of the regional economy. Similarly, a number of ground transportation sectors do not have a large impact on other economic sectors. Interurban and rural bus transportation (1.2151); other transit and ground passenger transportation (1.1963); and RV parks and recreational camps (1.1397) do not demonstrate the economic interconnectedness that may be presumed by their sectoral concentration in the region.

Automotive equipment rental and leasing (1.7065) stands out as a significant outlier for the region, with a large impact on other economic sectors. Arts and culture tourism industries also produce relatively robust spillover

effects to other economic sectors. Heritage institutions (1.3880); independent artists, writers and performers (1.3664); and performing arts companies (1.3024) all have relatively higher than expected impacts on other industries.

Rideau Heritage Corridor (with Ottawa and Kingston)

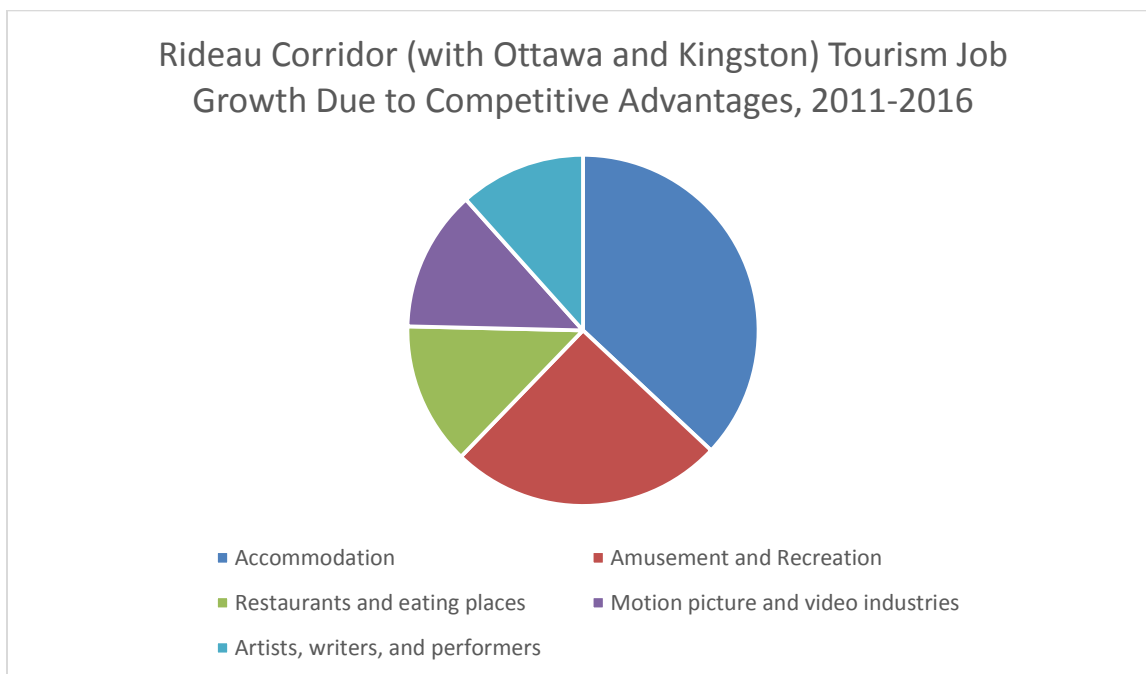
The Rideau Heritage corridor comprises the municipalities associated with the 11 members of the Rideau Heritage Route Tourism Association, where the Rideau Canal passes directly through - or adjacent to - the jurisdiction.⁵ The municipalities of Ottawa and Kingston are included in this analysis, as these cities produce much of the economic impact related to the Rideau Canal. Over 85% of the jobs in the tourism industry along the Corridor can be attributed to the two municipalities of Ottawa and Kingston.⁶ The inclusion of these urban centres are likely to skew the results of the corridor as a whole. It is estimated that the tourism industry contributed approximately \$5.5 billion to the corridor's GDP in 2016. Total employment in the corridor's tourism industry grew from 58,559 jobs in 2011 to 69,649 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs along the corridor are: full-service restaurants and limited-service eating places (34,687 jobs); traveller accommodation (7,115 jobs); other amusement and recreation industries (5,780); special food services (3,243 jobs); and independent artists, writer and performers (2,346 jobs).



⁵ Census subdivisions included are: Ottawa, Leeds and the Thousand Islands, Westport, Rideau Lakes, Merrickville-Wolford, North Grenville, Montague, Smiths Falls, Drummond/North Elmsley, Tay Valley, Perth, Kingston, South Frontenac, Beckwith, Carleton Place, Lanark Highlands, and Mississippi Mills.

⁶ Calculated using jobs data from the shift share analysis.

Overall, the corridor's tourism industry added 11,090 jobs between 2011 and 2016. Of this increase, 3,297 jobs can be attributed to national economic growth and 3,757 jobs can be attributed to growth in the tourism industry. As a result, 4,036 jobs can be attributed to the corridor's competitive advantages. The main contributors to job growth due to competitive advantages are: traveller accommodation (1,210 jobs); other amusement and recreation industries (826 jobs); full-service restaurants and limited-service eating places (430 jobs); motion picture and video industries (426 jobs); and independent artists, writers and performers (380 jobs).



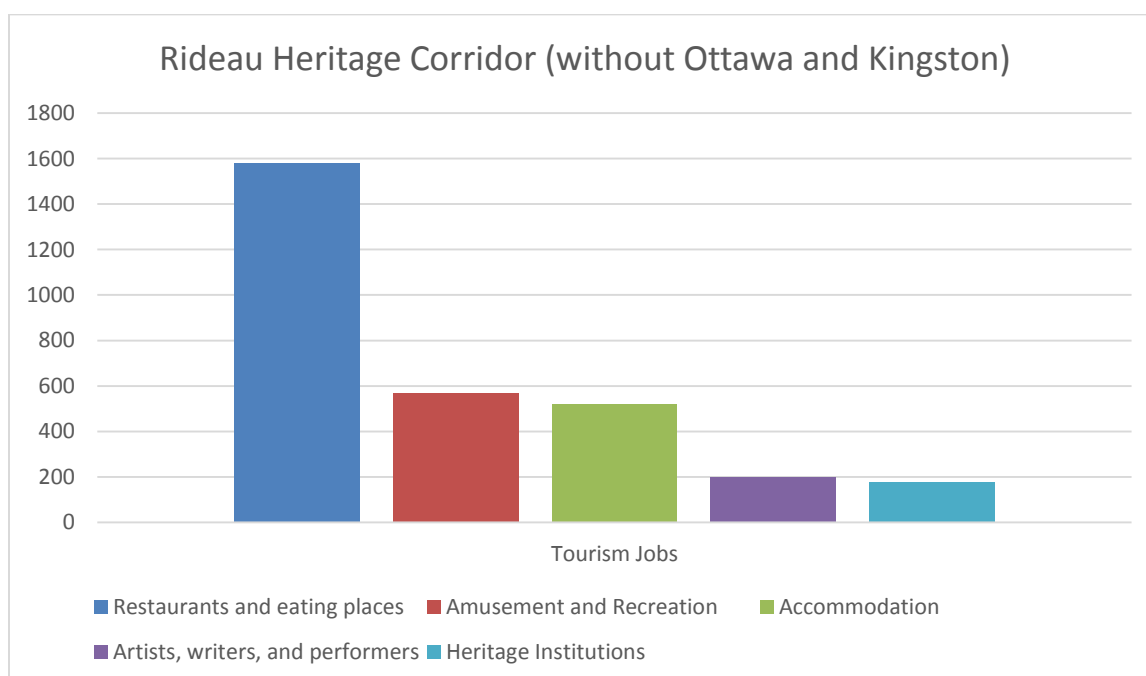
The corridor demonstrates a significant concentration of jobs in the 'scenic and sightseeing transportation, water' tourism sector, representing a location quotient of 2.00. The corridor has a lower location quotient for this sector compared to the region as a whole. The corridor does not share many of the other sectoral concentrations of the region as a whole.

Water and air transportation sectors in the tourism industry tend to have the deepest economic interdependencies and greatest impact on other corridor industries. Inland water transportation (1.9943) and deep sea, coastal and Great Lakes water transportation (1.8637) have a significant impact on other economic sectors. Scheduled air transportation (1.8677) and non-scheduled air transportation (1.8650) also have a high multiplier effect on jobs in other sectors. Rail transportation (1.7737) also contributes to spinoff employment effects.

Arts and culture tourism industries also produce relatively robust spillover effects to other economic sectors. Motion picture and video industries (1.7743) and heritage institutions (1.5813) have relatively high impacts on other industries. 'Scenic and sightseeing transportation, water' also has an impact (1.3803) on other sectors of the corridor's economy.

Regional Heritage Corridor (without Ottawa and Kingston)

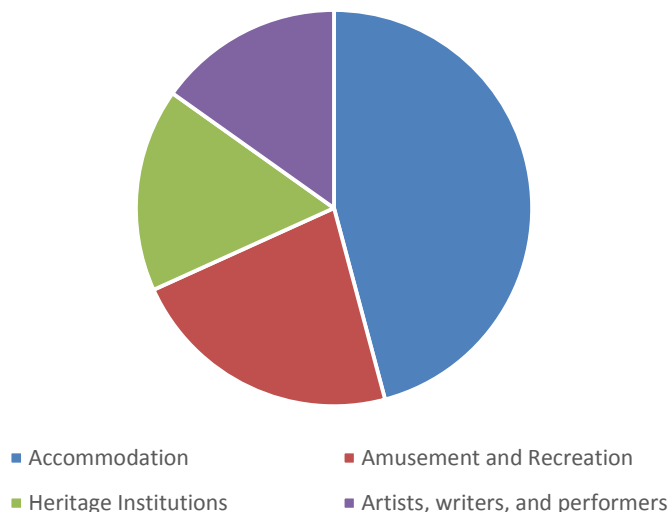
The Rideau Heritage corridor comprises the municipalities associated with the 11 members of the Rideau Heritage Route Tourism Association, where the Rideau Canal passes directly through - or adjacent to - the jurisdiction.⁷ The municipalities of Ottawa and Kingston are not included in this analysis. The exclusion of these urban centres will demonstrate the economic impact of tourism and the Rideau Canal on the members of the Rideau Heritage Route Tourism Association themselves. It is estimated that the tourism industry contributed approximately \$309 million to the corridor's GDP in 2016. Total employment in the corridor's tourism industry grew from 3,306 jobs in 2011 to 3,886 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs along the corridor are: full-service restaurants and limited-service eating places (1,579 jobs); other amusement and recreation industries (570); traveller accommodation (519 jobs); independent artists, writer and performers (201 jobs); and heritage institutions (179 jobs).



Overall, the corridor's tourism industry added 580 jobs between 2011 and 2016. Of this increase, 186 jobs can be attributed to national economic growth and 214 jobs can be attributed to growth in the tourism industry. As a result, 181 jobs can be attributed to the corridor's competitive advantages. The main contributors to job growth due to competitive advantages are: traveller accommodation (127 jobs); other amusement and recreation industries (62 jobs); heritage institutions (46 jobs); and independent artists, writers and performers (42 jobs).

⁷ Census subdivisions included are: Leeds and the Thousand Islands, Westport, Rideau Lakes, Merrickville-Wolford, North Grenville, Montague, Smiths Falls, Drummond/North Elmsley, Tay Valley, Perth, and South Frontenac.

Rideau Corridor (without Ottawa and Kingston) Tourism Job Growth Due to Competitive Advantages, 2011-2016



Isolating the municipalities directly impacted by the Rideau Canal results in heritage institutions (4.51 LQ) having the highest location quotient amongst all tourism sectors. Ground transportation sectors also have a high concentration along the corridor, including: interurban and rural bus transportation (4.29 LQ); RV parks and recreational camps (3.46 LQ); school and employee bus transportation (3.20 LQ); and other transit and ground passenger transportation (3.09 LQ). Sectors directly related to the Rideau Canal - scenic and sightseeing transportation, water (2.02 LQ) and the marinas included in other amusement and recreation industries (2.19 LQ) - are also fairly concentrated along the corridor.

Without Ottawa and Kingston, the tourism sectors that have the deepest economic interdependencies and greatest impact on other corridor industries changes significantly. Transportation industries lead by this measure, with non-scheduled air transportation (1.7419) and urban transit systems (1.4329). Apart from gambling industries (1.4654), the remainder of tourism economic sectors do not have large spillover effects to other tourism industries.

2) Counties

United Counties of Leeds and Grenville

The United Counties of Leeds and Grenville includes 10 census subdivisions.⁸ In terms of the overall economy of the region, the top industries are: manufacturing, retail, transportation and logistics, agriculture and food processing, and tourism.⁹ A key demand generator for tourism in Leeds and Grenville are the counties' natural assets, including: the Rideau Canal, the 1000 Islands and St. Lawrence Seaway, and the Frontenac Arch Biosphere.

The seasonal population of Leeds and Grenville increases significantly in the summer months due to cottage rentals and campsites. The municipality's website lists 55 cottage and camp businesses on its website, most with multiple units available.¹⁰ Seasonal cottage renters often use boats on the canal as a transportation method through the county. A separate group of tourists tend to travel from Ottawa to shop, but not to boat.¹¹ The area is rich in boutique shopping in particular, specifically in Westport and Merrickville-Wolford. Apart from medium-range hotels in Smiths Falls, most accommodation is primarily bed and breakfasts and cottage rentals.¹² The agriculture and food industry also have connectivity with the tourism industry, with more agri-tourism occurring. This includes having more local food at restaurants and local festivals.¹³ Breweries, distilleries, and wineries also contribute to this economic trend.

Families tend to be the core demographic of the summer tourism season.¹⁴ Millennials are also a significant demographic, with many coming to the area for adventure and outdoor tourism.¹⁵ Older demographics tend to form an important demographic during the spring and autumn seasons, coming to the area regularly for shopping and restaurants.¹⁶ The towns in particular are also hubs for tourists seeking these attractions, often appealing to couples and women. Tourists coming from the United States are also an important group, as are international tourists - particularly from Germany - arriving through the Ottawa International Airport.¹⁷ Important tourism attractors include: the Shorelines Casino, the Opinicon Dining & Resort, local artisans, and Parks Canada and the St. Lawrence Parks Commission.

It is estimated that the tourism industry contributed approximately \$183 million to the counties' GDP in 2016. Total employment in the counties' tourism industry grew from 1,949 jobs in 2011 to 2,303 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the counties are: full-service restaurants and

⁸ Census subdivisions included are: Edwardsburgh/Cardinal, Augusta, Elizabethtown-Kitley, Front of Yonge, Leeds and the Thousand Islands, Westport, Rideau Lakes, Athens, Merrickville-Wolford, and North Grenville.

⁹ Interview with United Counties of Leeds and Grenville, February 15, 2017.

¹⁰ United Counties of Leeds and Grenville, Cottage & Cabin Rental Directory.

¹¹ Ibid.

¹² Ibid.

¹³ Ibid.

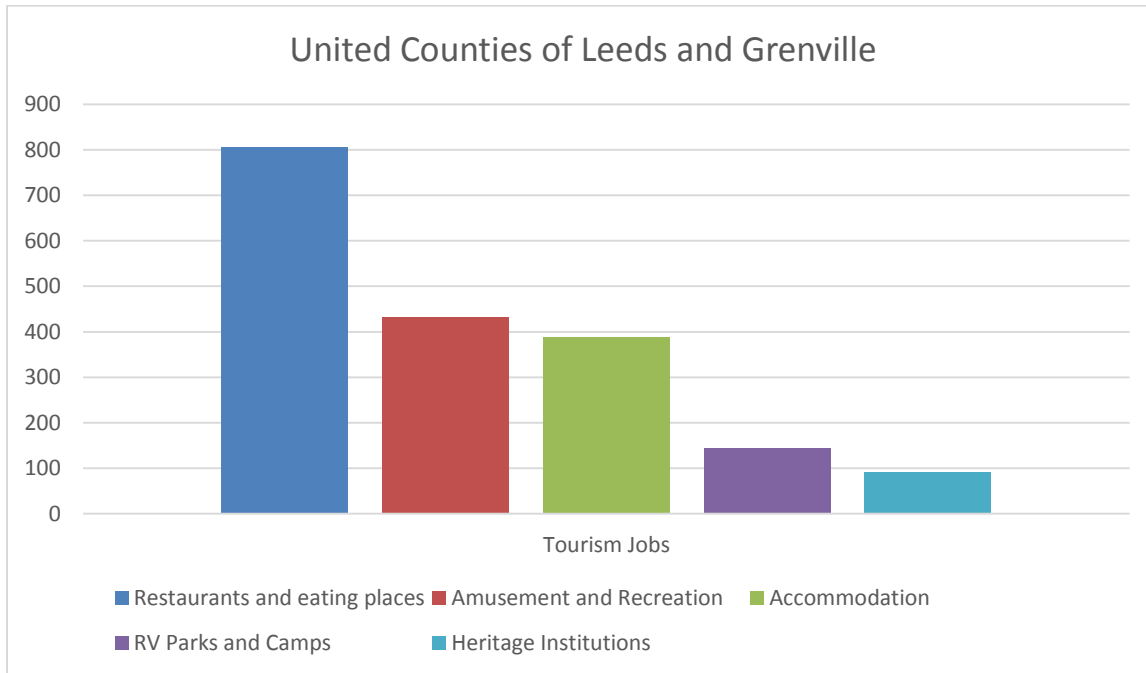
¹⁴ Ibid.

¹⁵ Ibid.

¹⁶ Ibid.

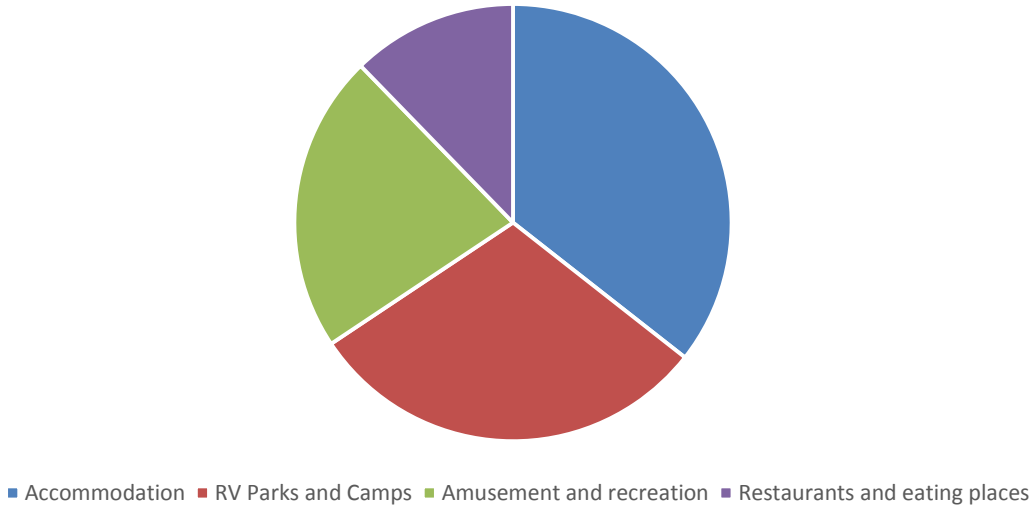
¹⁷ Ibid.

limited-service eating places (806 jobs); other amusement and recreation industries (432); traveller accommodation (389 jobs); and RV parks and recreational camps (144 jobs). Heritage institutions (92 jobs) also have a significant showing.



Overall, the counties’ tourism industry added 354 jobs between 2011 and 2016. Of this increase, 110 jobs can be attributed to national economic growth and 100 jobs can be attributed to growth in the tourism industry. As a result, 144 jobs can be attributed to the counties’ competitive advantages. The main contributors to job growth due to competitive advantages are: traveller accommodation (58 jobs); RV parks and recreational camps (49 jobs); other amusement and recreation industries (36 jobs); and full-service restaurants and limited-service eating places (20 jobs).

United Counties of Leeds and Grenville Tourism Job Growth Due to Competitive Advantages, 2011-2016



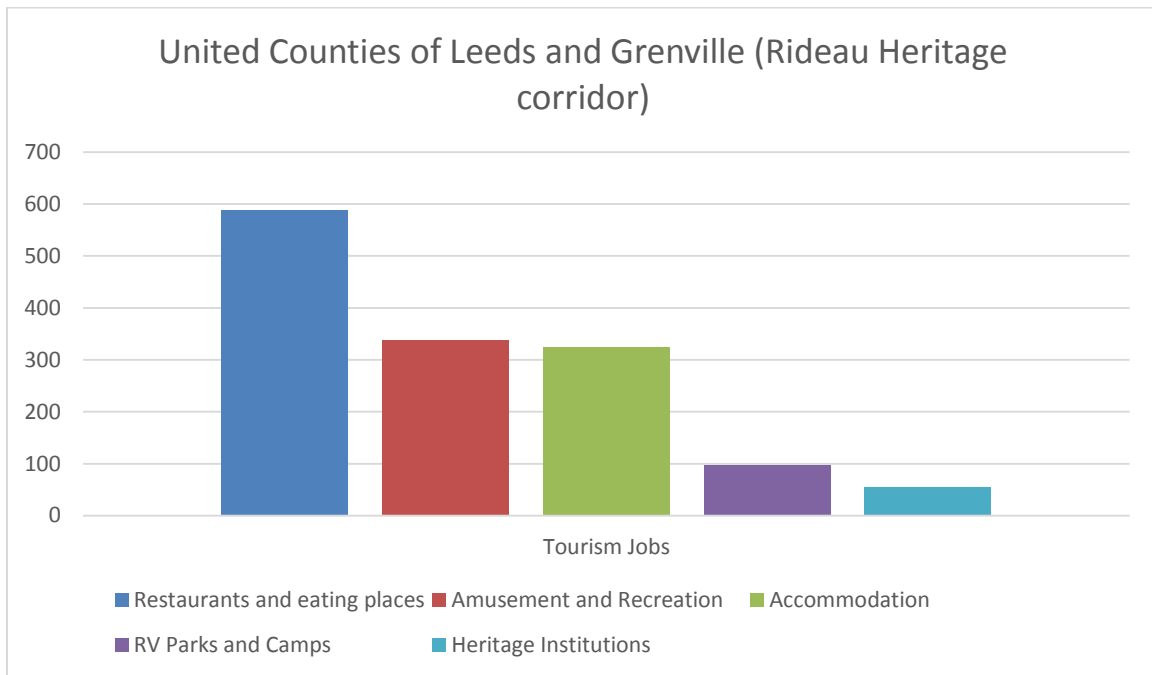
By far, ‘scenic and sightseeing transportation, water’ (9.41 LQ) has the highest location quotient amongst all tourism sectors. Other significant concentrations of businesses include: RV parks and recreational camps (7.97 LQ); interurban and rural bus transportation (4.97 LQ); and heritage institutions (3.84 LQ).

The tourism sectors that have the deepest economic interdependencies and greatest impact on other county industries are air, rail, and ground transportation. Non-scheduled air transportation (1.6033); scheduled air transportation (1.5979); rail transportation (1.5462); and urban transit systems (1.3545) lead these sectors. Apart from gambling industries (1.3865), the remainder of tourism economic sectors do not have large spillover effects to other tourism industries.

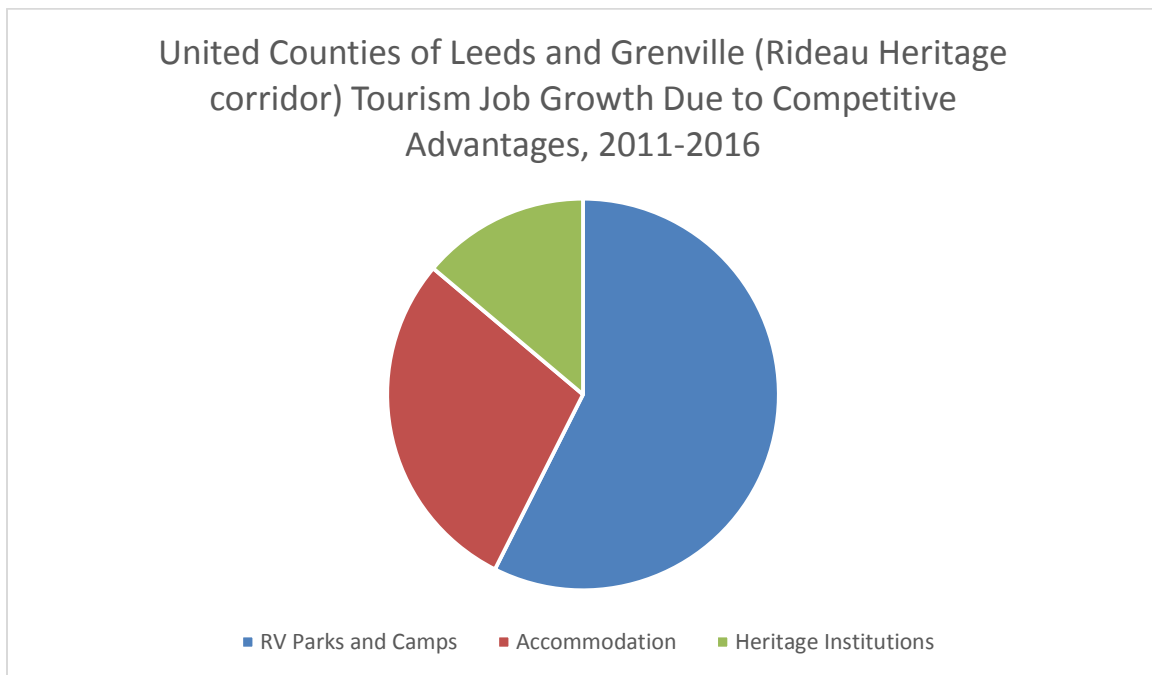
United Counties of Leeds and Grenville (Rideau Heritage corridor)

Isolating only those census subdivisions¹⁸ within Leeds and Grenville that lie along the Rideau Heritage corridor somewhat changes the economic impact of the tourism industry on the area. It is estimated that the tourism industry contributed approximately \$135 million to the counties’ GDP in 2016. Total employment in the counties’ tourism industry grew from 1,481 jobs in 2011 to 1,700 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the counties are: full-service restaurants and limited-service eating places (589 jobs); other amusement and recreation industries (339); traveller accommodation (324 jobs); and RV parks and recreational camps (98 jobs). In addition, heritage institutions (54 jobs) has a significant showing.

¹⁸ Census subdivisions include: Leeds and the Thousand Islands, Westport, Rideau Lakes, Merrickville-Wolford, and North Grenville.



Overall, the counties' tourism industry added 219 jobs between 2011 and 2016. Of this increase, 83 jobs can be attributed to national economic growth and 77 jobs can be attributed to growth in the tourism industry. As a result, 58 jobs can be attributed to the counties' competitive advantages. The main contributors to job growth due to competitive advantages are: RV parks and recreational camps (35 jobs); traveller accommodation (29 jobs); and heritage institutions (14 jobs).



RV parks and recreational camps (8.94 LQ) and interurban and rural bus transportation (8.14 LQ) have the highest location quotients amongst tourism sectors. Other significant concentrations of businesses include: scenic and sightseeing transportation, water (5.47 LQ); heritage institutions (3.67 LQ); and other amusement and recreation industries (3.54 LQ).

The tourism sectors that have the deepest economic interdependencies and greatest impact on other industries in the counties are air, rail, and ground transportation. Non-scheduled air transportation (1.4960); rail transportation (1.4945); and urban transit systems (1.3282) lead these sectors. Apart from gambling industries (1.3443), the remainder of tourism economic sectors do not have large spillover effects to other tourism industries.

Lanark County

Lanark County includes 8 census subdivisions.¹⁹ In terms of the overall economy of the region, the current economic climate in Lanark County is dominated by its top industries, (by total number of establishments) specifically (1) Construction, (2) Professional, Scientific and Technical Services, (3) Retail, (4) Other Services, (5) Real Estate and Rental and Leasing (6) Agriculture, Forestry, Fishing and Hunting, (7) Accommodation and Food Services, (8) Manufacturing, (9) Health Care and Social Assistance, and finally (10) Administrative and Support, Waste Management and Remediation Services.²⁰ Natural heritage is the biggest driver of tourism in the county.²¹ The area includes the Canadian Shield, the St. Lawrence lowlands, the Ottawa Valley, bush, and open spaces.²² There are two provincial parks - Silver Lake and Murphys Point - which draw over 100,000 tourists per year.²³

The county includes two hotels: one in Perth and one in Smiths Falls.²⁴ The Best Western Plus in Perth is a four-star hotel with spa, restaurant, and amenities, and is the hotel chain's flagship property in Canada. In addition to the hotels, there are many motels and bed and breakfasts throughout the county. The two provincial parks and other campgrounds can accommodate RVs and trailers.

The main demographic group of tourists tends to be couples over 35 years of age with no children.²⁵ The majority of tourists come from Ottawa, with the remainder coming from the rest of Ontario, as well as some international tourists.²⁶ Lanark County attracts 24% of visitors to the Ontario Highlands region.²⁷ Of these tourists: 65% were same-day trips by Ontario residents; 46% were visiting friends or relatives; 31% were

¹⁹ Census subdivisions included are: Montague, Drummond/North Elmsley, Tay Valley, Perth, Beckwith, Carleton Place, Mississippi Mills, and Lanark Highlands.

²⁰ Interview with Lanark County, February 24, 2017.

²¹ Ibid.

²² Ibid.

²³ Ibid.

²⁴ Ibid.

²⁵ Ibid.

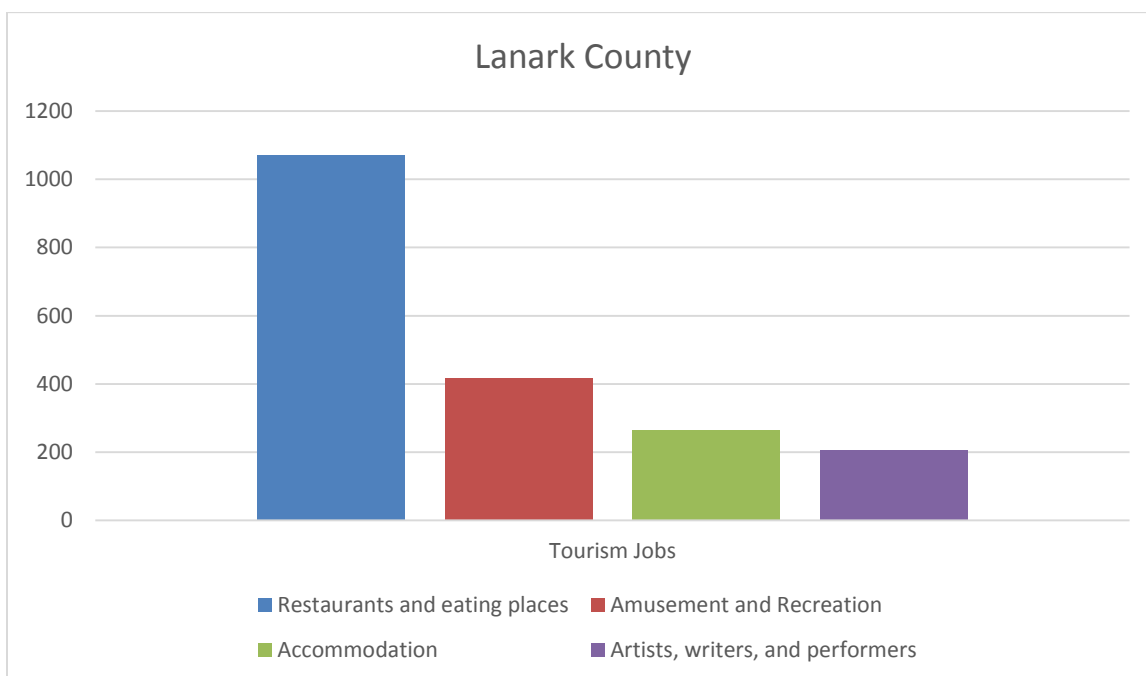
²⁶ Ibid.

²⁷ Lanark County, Destination Development Plan, 2014-2018.

pleasure travellers; 65% stayed in private homes.²⁸ On average, these tourists spent 35% of their budget on transportation and 28% on food and beverages, the two largest expenditure categories.²⁹

Lanark County hosts over 100 events throughout the year. The county has over 60 restaurants, approximately 10 of which specifically source locally-grown food. The retail sector also sells agricultural goods, such as maple products.

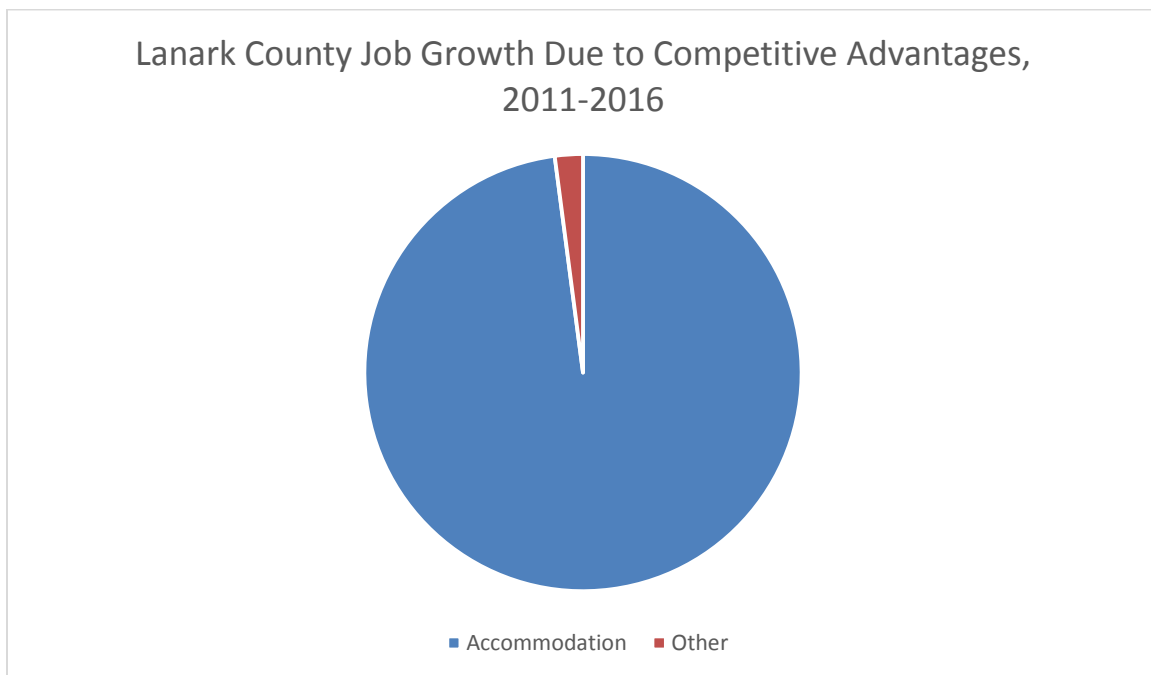
It is estimated that the tourism industry contributed approximately \$186 million to the county’s GDP in 2016. Total employment in the county’s tourism industry grew from 1,906 jobs in 2011 to 2,341 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the county are: full-service restaurants and limited-service eating places (1,071 jobs); other amusement and recreation industries (416 jobs); traveller accommodation (264 jobs); and independent artists, writers and performers (205 jobs).



Overall, the county’s tourism industry added 435 jobs between 2011 and 2016. Of this increase, 107 jobs can be attributed to national economic growth and 134 jobs can be attributed to growth in the tourism industry. As a result, 193 jobs can be attributed to the county’s competitive advantages. The main contributor to job growth due to competitive advantages is traveller accommodation (189 jobs).

²⁸ Ibid.

²⁹ Ibid.



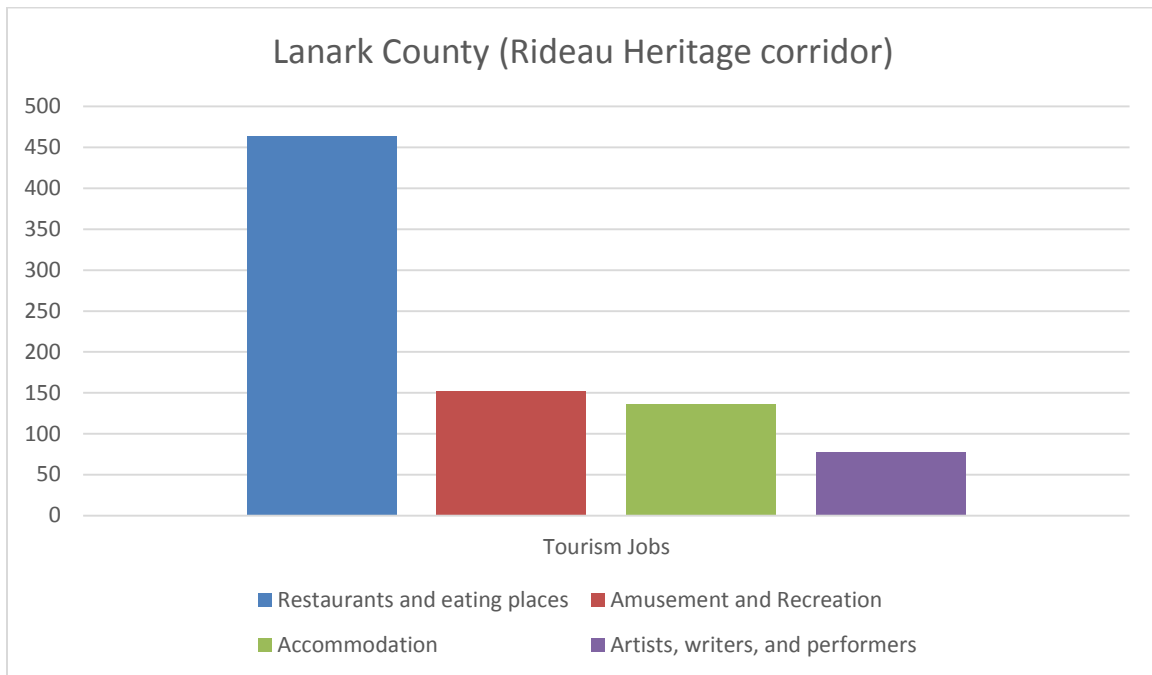
Ground transportation has the highest location quotient amongst all tourism sectors, including: other transit and ground passenger transportation (4.69 LQ) and interurban and rural bus transportation (2.72 LQ). Other significant concentrations of businesses include: scenic and sightseeing transportation, water (3.30 LQ); independent artists, writers and performers (3.20 LQ); and other amusement and recreation activities (2.48 LQ).

The tourism sectors that have the deepest economic interdependencies and greatest impact on other county industries are: deep sea, coastal and Great Lakes water transportation (1.7024); heritage institutions (1.6714); and the motion picture and video industries (1.6285). Air and rail transportation also have a significant impact on other economic sectors. Scheduled air transportation (1.6203); non-scheduled air transportation (1.5946); and rail transportation (1.4685) lead these transportation categories.

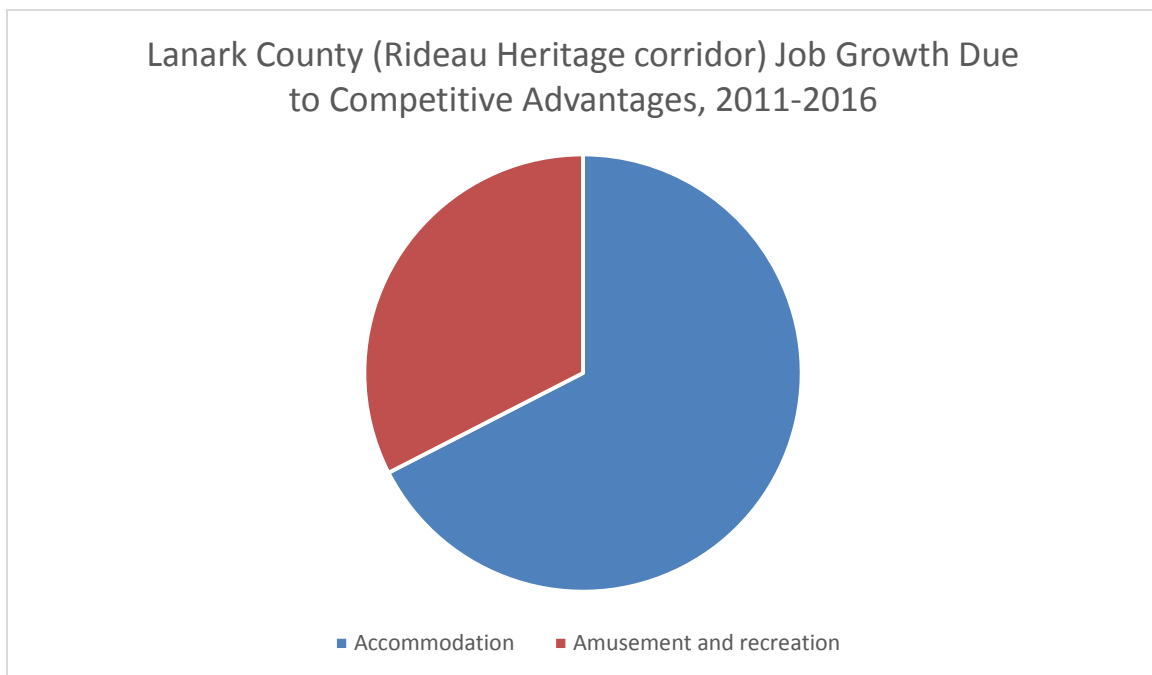
Lanark County (Rideau Heritage corridor)

Isolating only those census subdivisions³⁰ within Lanark County that lie along the Rideau Heritage corridor somewhat changes the economic impact of the tourism industry on the area. It is estimated that the tourism industry contributed approximately \$78 million to the county’s GDP in 2016. Total employment in the county’s tourism industry grew from 778 jobs in 2011 to 981 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the county are: full-service restaurants and limited-service eating places (464 jobs); other amusement and recreation industries (152 jobs); traveller accommodation (136 jobs); and independent artists, writers and performers (78 jobs).

³⁰ Census subdivisions include: Montague, Drummond/North Elmsley, Tay Valley, and Perth.



Overall, the county’s tourism industry added 203 jobs between 2011 and 2016. Of this increase, 44 jobs can be attributed to national economic growth and 54 jobs can be attributed to growth in the tourism industry. As a result, 105 jobs can be attributed to the county’s competitive advantages. The main contributors to job growth due to competitive advantages are: traveller accommodation (85 jobs) and other amusement and recreation industries (41 jobs). It should be noted that the county lost 48 jobs due to competitive disadvantages in the full-service restaurants and limited-service eating places sector.



Other transit and ground passenger transportation (6.38 LQ) and school and employee bus transportation (2.60 LQ) have high location quotients amongst tourism sectors. Another significant concentration of jobs is found in the independent artists, writers and performers (2.61 LQ) tourism sector.

The tourism sector that has the deepest economic interdependencies and greatest impact on other county industries is heritage institutions (1.1011). It should be noted that no tourism sectors have a large impact on other sectors of the economy along the Rideau Canal corridor in Lanark County.

3) Municipalities

Drummond/North Elmsley

Drummond/North Elmsley's tourist industry assets are largely related to bodies of water.³¹ The Rideau Canal itself supports businesses such as Beveridge Locks and businesses located in Rideau Ferry.³² The municipality includes three marinas, canoe docks at Ferguson's Falls, as well as boat/canoe launches on Rideau Lake, the Mississippi River, and Mississippi Lake. The municipality also includes other natural assets, such as wildlife reserves and trails.

Drummond/North Elmsley has a number of campgrounds for accommodation. The municipality also has many retail outlets selling local goods, including a maple sugar camp restaurant and wedding venue, a chip stand, an Amish Furniture Store, the Balderson Cheese Store, and specialty shops such as Coutts Country Flavours and Sew Crafty. In general, the tourism industry has a small impact on the local economy through farm tourism, the craft industry, docks, and marinas.³³

The township also hosts a number of events. There are several fishing tournaments on the Rideau Lake, an antique boat show in Rideau Ferry, and a bi-annual boat regatta.³⁴ A yacht club is also present in Rideau Ferry, associated with the Rideau Valley Conservation Area.

It is estimated that the tourism industry contributed approximately \$6.2 million to the municipality's GDP in 2016. Total employment in the township's tourism industry grew from 37 jobs in 2011 to 78 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the township are: traveller accommodation (33 jobs) and other amusement and recreation industries (22 jobs).

³¹ Interview with Drummond/North Elmsley, February 9, 2017.

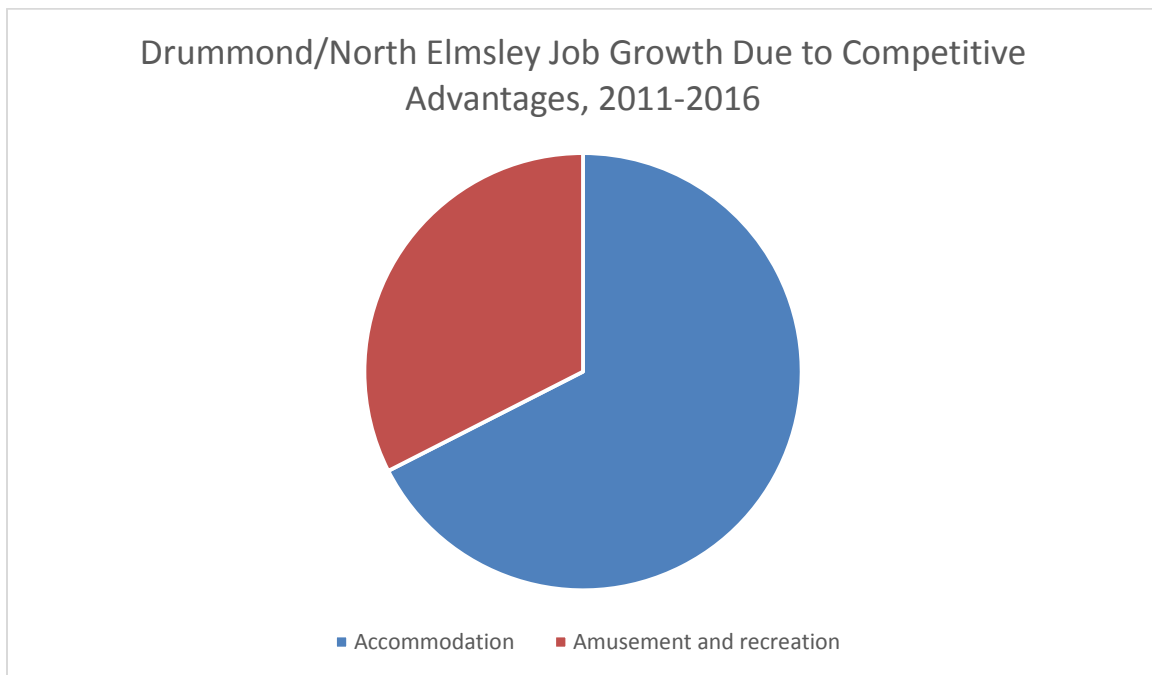
³² Ibid.

³³ Ibid.

³⁴ Ibid.



Overall, the township’s tourism industry added 41 jobs between 2011 and 2016. Of this increase, 2 jobs can be attributed to national economic growth and 1 job can be attributed to growth in the tourism industry. As a result, 39 jobs can be attributed to the township’s competitive advantages. The main contributors to job growth due to competitive advantages are: traveller accommodation (27 jobs) and other amusement and recreation industries (13 jobs).



Traveller accommodation (5.88 LQ) and school and employee bus transportation (5.35 LQ) have the highest location quotients amongst tourism sectors. Other significant concentrations of jobs are found in: other amusement and recreation (4.47 LQ); drinking places (alcoholic beverages) (4.24 LQ); and heritage institutions (3.62 LQ).

The tourism sector that has the deepest economic interdependencies and greatest impact on other industries in the township is heritage institutions (1.1266). It should be noted that no tourism sectors have a large impact on other sectors of the economy in Drummond/North Elmsley.

Leeds and the Thousand Islands

Tourism is the main driver of the economy in Leeds and the Thousand Islands.³⁵ The municipality has a gateway to the Rideau Canal through Seeley's Bay, a quaint fishing village. The municipality enjoys many villages, islands, and tourism opportunities on the St. Lawrence as well.³⁶ The natural asset of the Frontenac Arch Biosphere also goes through the entire township.

Accommodation is primarily cottages and camping on the Rideau Canal, with some resorts and one higher-end hotel near the St. Lawrence.³⁷ A number of resorts are based on guided fishing tours.³⁸ Many tour operators also have businesses on the St. Lawrence and in Rockport.³⁹ The township is also embarking on a trail strategy, using provincial parks as a base for ecotourism.⁴⁰ Niche retailers, chocolatiers, and gift shops also provide retail experiences for tourists.

Demographically, a number of retirees with disposable income visit the area. Many of these retirees visit the area and decide to move to the township, bringing investment capital.⁴¹ Families are also a significant demographic. They are generally looking for an entire weekend of activities to entertain children.⁴²

It is estimated that the tourism industry contributed approximately \$36.2 million to the municipality's GDP in 2016. Total employment in the township's tourism industry grew from 404 jobs in 2011 to 456 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the township are: traveller accommodation (184 jobs); other amusement and recreation industries (122 jobs); full-service restaurants and limited-service eating places (61 jobs); and travel arrangement and reservation services (31 jobs).

³⁵ Interview with Leeds and the Thousand Islands, February 21, 2017.

³⁶ Ibid.

³⁷ Ibid.

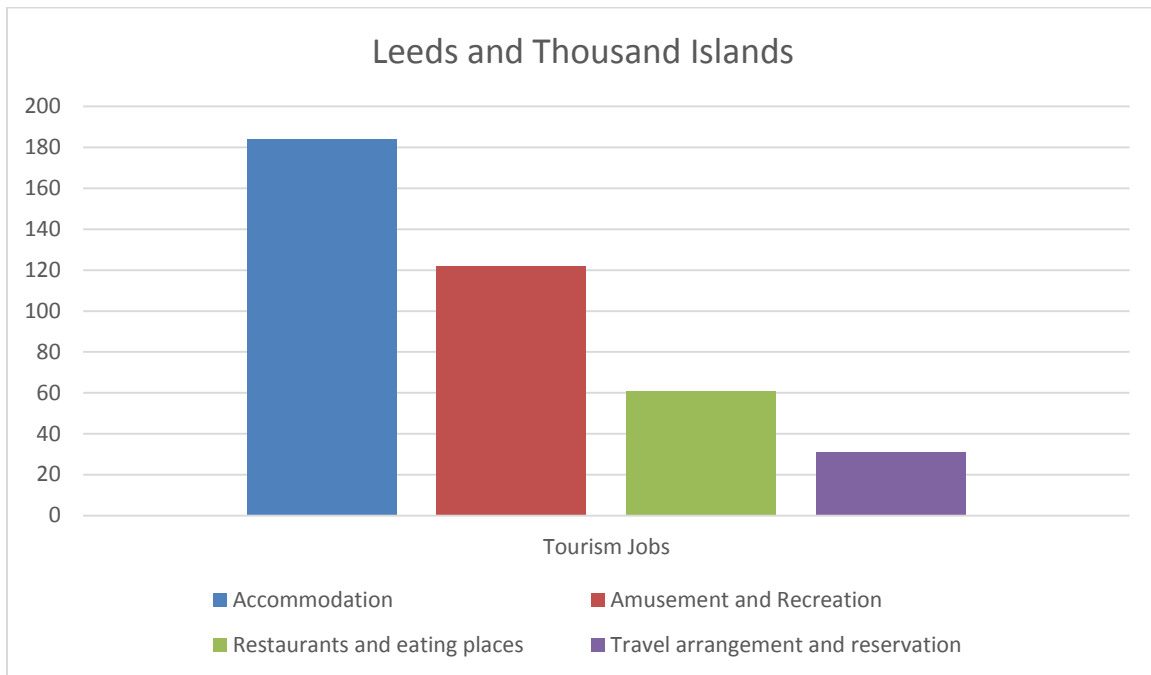
³⁸ Ibid.

³⁹ Ibid.

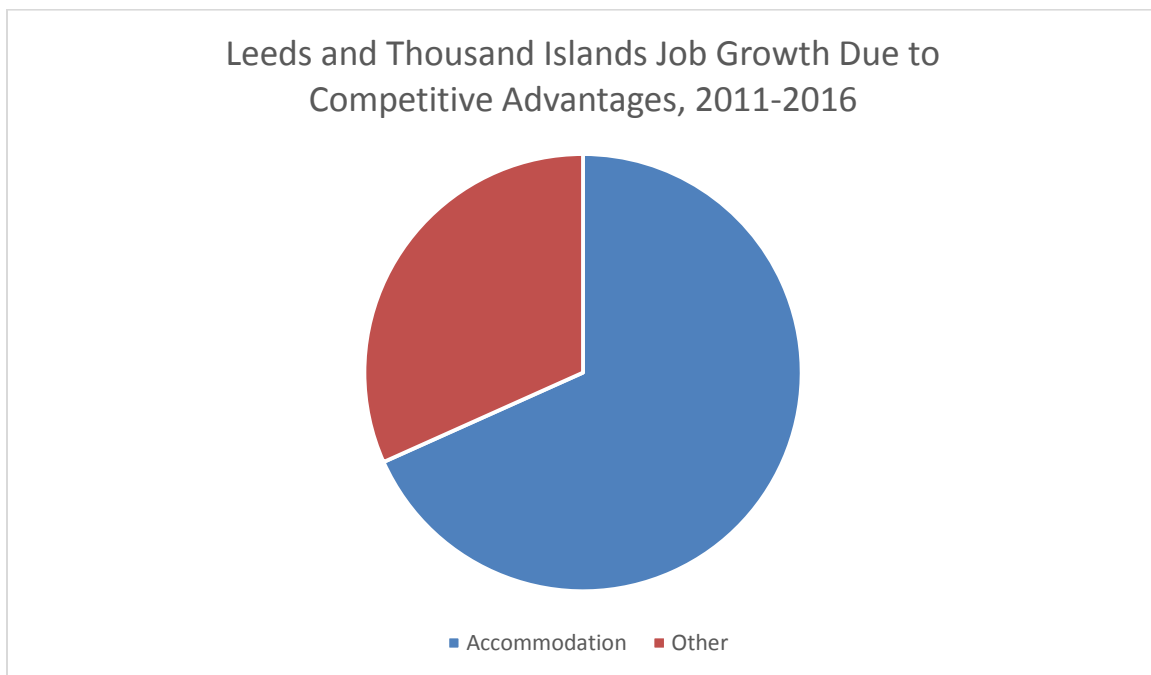
⁴⁰ Ibid.

⁴¹ Ibid.

⁴² Ibid.



Overall, the township’s tourism industry added 41 jobs between 2011 and 2016. Of this increase, 2 jobs can be attributed to national economic growth and 1 job can be attributed to growth in the tourism industry. As a result, 39 jobs can be attributed to the township’s competitive advantages. The main contributor to job growth due to competitive advantages is: traveller accommodation (28 jobs).



By far, ‘scenic and sightseeing transportation, water’ (31.50 LQ) has the highest location quotient of all tourism sectors in the township. Other significant concentrations of jobs are found in: traveller accommodation

(9.73 LQ); other amusement and recreation industries (7.34 LQ); travel arrangement and reservation services (6.55 LQ); amusement parks and arcades (6.43 LQ); and RV parks and recreational camps (5.50 LQ).

The tourism sectors that have the deepest economic interdependencies and greatest impact on other industries in the township are rail transportation (1.2115) and non-scheduled air transportation (1.2012). It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in Leeds and the Thousand Islands.

Merrickville-Wolford

In Merrickville-Wolford, the Rideau Canal and the 150-year old heritage buildings are tourism assets that draws visitors to the village.⁴³ The Blockhouse Museum and the marinas below the locks are significant tourism drivers.⁴⁴ Parks Canada is also a tourism asset, including dockage and moorings that allow visitors to come into town.⁴⁵

Accommodation is primarily provided in terms of bed and breakfasts.⁴⁶ However, there is also overnight dockage at the marinas for about 50-60 slips.⁴⁷ A number of boutique shops are a major attraction in town, and visitors often come from Ottawa to shop in the village.⁴⁸ Events are a common tourist draw as well. Some of the larger events include the car show - which draws about 10,000 visitors - and Christmas in Merrickville.⁴⁹ A number of artists and artisans also live in the community and tourists come to purchase art, paintings, and sculptures.⁵⁰

In terms of demographics, most visitors arriving by land are middle-income and contribute to the business garnered by local shops through foot traffic.⁵¹ For boaters, many visitors are above 40 years of age and belong to higher income brackets.⁵²

It is estimated that the tourism industry contributed approximately \$9.1 million to the municipality's GDP in 2016. Total employment in the village's tourism industry grew from 109 jobs in 2011 to 114 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the village are: full-service restaurants and limited-service eating places (32 jobs); other amusement and recreation industries (28 jobs); and performing arts companies (12 jobs).

⁴³ Interview with Merrickville-Wolford, February 13, 2017.

⁴⁴ Ibid.

⁴⁵ Ibid.

⁴⁶ Ibid.

⁴⁷ Ibid.

⁴⁸ Ibid.

⁴⁹ Ibid.

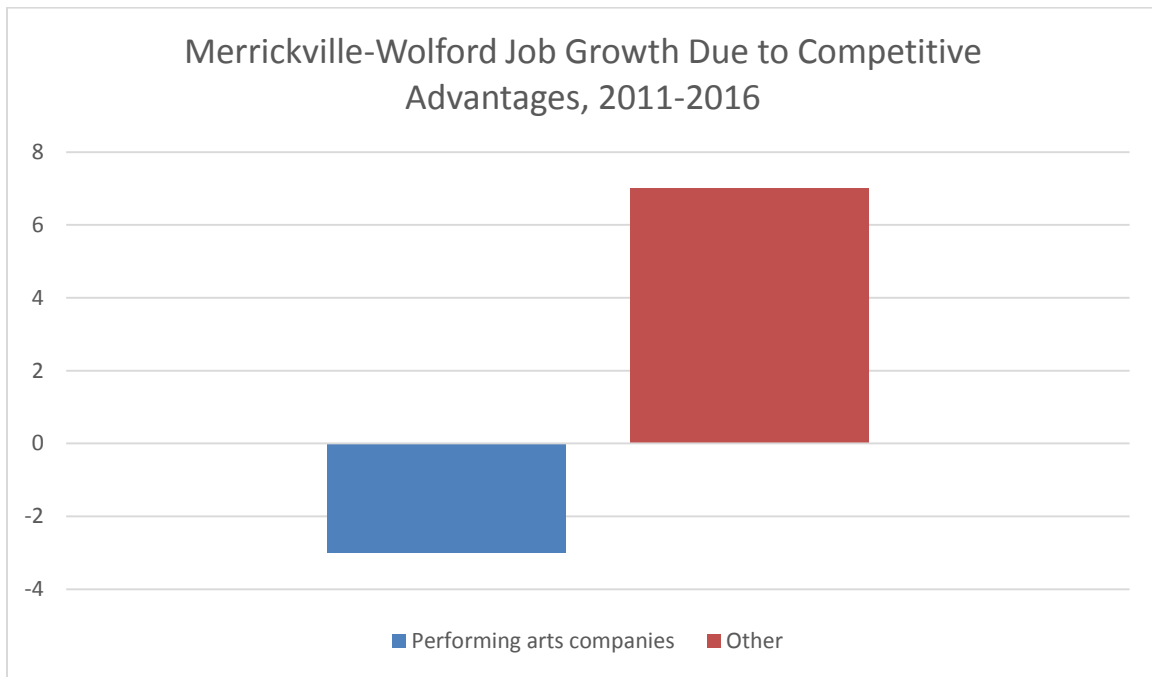
⁵⁰ Ibid.

⁵¹ Ibid.

⁵² Ibid.



Overall, the village’s tourism industry added 5 jobs between 2011 and 2016. Of this increase, 6 jobs can be attributed to national economic growth and 2 jobs can be attributed to growth in the tourism industry. As a result, a loss of 3 jobs can be attributed to the village’s competitive disadvantages. The main contributors to job loss due to competitive disadvantages is performing arts companies (-10 jobs).



RV parks and recreational camps (9.96 LQ) has the highest location quotient of all tourism sectors in the village. Other significant concentrations of jobs are found in: performing arts companies (7.05 LQ); spectator sports (6.50 LQ); other amusement and recreation industries (3.12 LQ); and heritage institutions (3.01 LQ).

It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in Merrickville-Wolford.

North Grenville

North Grenville is a rural community with a number of beautiful hamlets with heritage and culture, which proves attractive to tourists. The south arm of the Rideau (not the main river itself) passes into the town of Kemptville. This has made the old town of Kemptville appealing for tourists due to docking facilities downtown and kayak rentals.⁵³ Pirate Cove Marina is also another tourist asset.⁵⁴ Burritt's Rapids is the oldest town on the canal with many heritage structures, but has not proven to be a significant tourist attractor.⁵⁵

For accommodation, North Grenville offers smaller hotels, bed and breakfasts, camping at the Rideau Provincial Park, and minimal cottage rentals.⁵⁶ For recreation, there are many boating activities in the summer between Kemptville and Manotick. A day pass can also be purchased to pass through as many locks as possible on the canal.⁵⁷ The town also offers many trails in the area and fishing in the summer and winter. Local amenities include: local restaurants, bakeries, a winery, and a farmer's market. There are over 60 shops and dining destinations in Old Town Kemptville.⁵⁸ Kemptville also includes events such as the Live Music Festival - which attracts 10,000 visitors - and the Rib Fest.⁵⁹

North Grenville focuses on Ottawa as its tourism market, particularly day-trippers.⁶⁰ Often, these visitors are retirees or families with children.⁶¹ Most tourists tend to be land visitors as opposed to arriving by water transportation.⁶² This may be because water visitors are less likely to depart the main branch of the Rideau to take the south branch to downtown Kemptville.⁶³ A bridge also restricts certain boats from making this detour.

It is estimated that the tourism industry contributed approximately \$60.4 million to the municipality's GDP in 2016. Total employment in the town's tourism industry grew from 655 jobs in 2011 to 761 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the municipality are: full-service restaurants and

⁵³ Interview with Municipality of North Grenville, February 16, 2017.

⁵⁴ Ibid.

⁵⁵ Ibid.

⁵⁶ Ibid.

⁵⁷ Ibid.

⁵⁸ Municipality of North Grenville, Community Profile, 2016.

⁵⁹ Interview with Municipality of North Grenville, February 16, 2017.

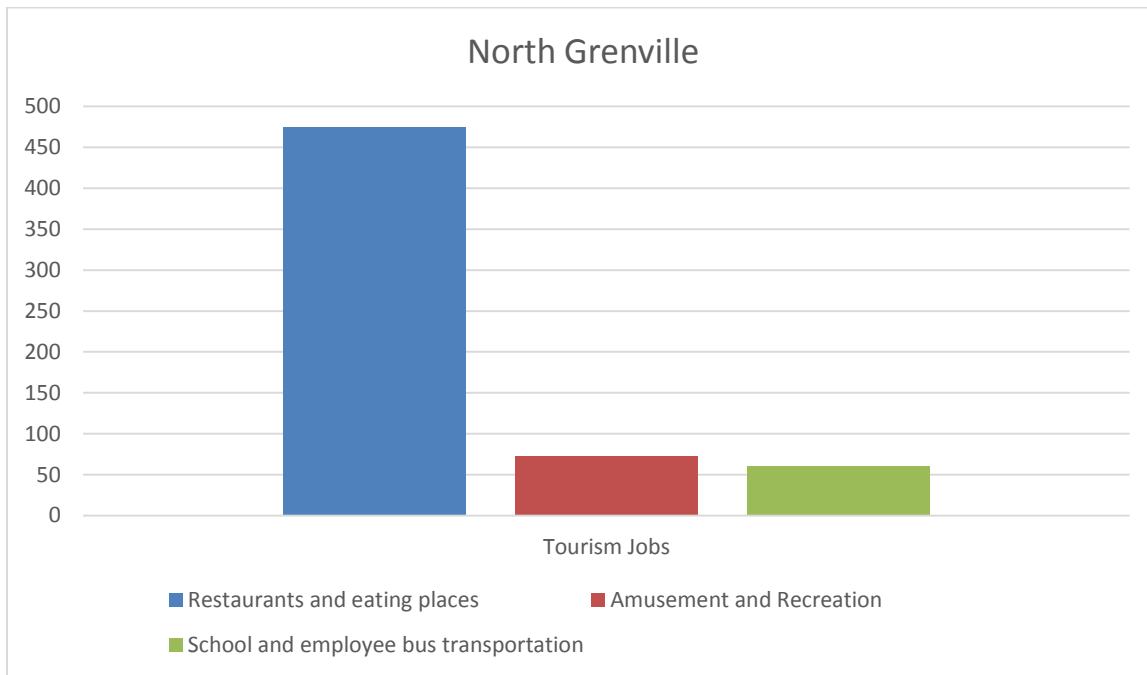
⁶⁰ Ibid.

⁶¹ Ibid.

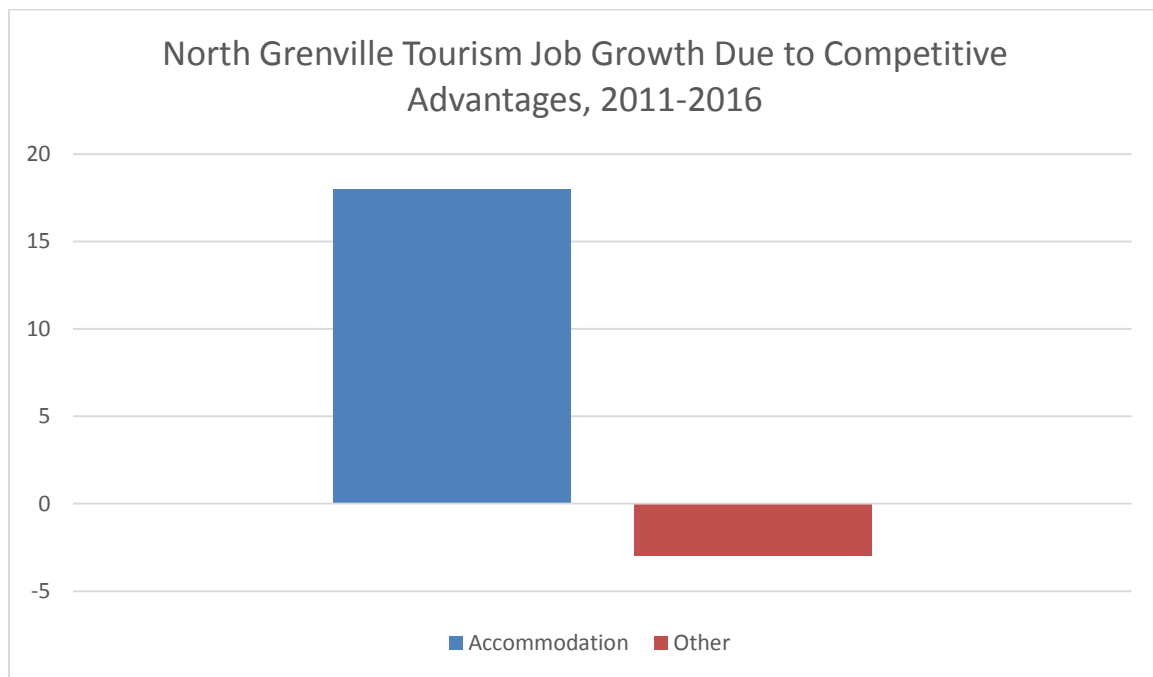
⁶² Ibid.

⁶³ Ibid.

limited-service eating places (475 jobs); other amusement and recreation industries (73 jobs); and school and employee bus transportation (60 jobs).



Overall, the town’s tourism industry added 106 jobs between 2011 and 2016. Of this increase, 37 jobs can be attributed to national economic growth and 54 jobs can be attributed to growth in the tourism industry. As a result, a gain of 15 jobs can be attributed to the municipality’s competitive advantages. The main contributors to job increases due to competitive advantages is traveller accommodation (18 jobs). It should be noted that 15 jobs were lost in the other amusement and recreation industries sector due to competitive disadvantages.



Bus travel has a high location quotient of all tourism sectors in the municipality, including interurban and rural bus transportation (15.88 LQ) and school and employee bus transportation (5.62 LQ). RV parks and recreational camps (4.05 LQ) also has a significant location quotient.

The tourism sector that has the deepest economic interdependencies and greatest impact on other industries in the municipality is urban transit systems (1.2417). It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in North Grenville.

Rideau Lakes

Tourism is one of the core economic drivers for the Township of Rideau Lakes, particularly on a seasonal basis.⁶⁴ A competitive advantage is that Rideau Lakes has a majority of the lake assets instead of the canal style of waterway.⁶⁵ The township's geographic location is also unique in that it includes the Canadian Shield and the St. Lawrence lowlands. This transition is known as the Frontenac Arch, a UNESCO Biosphere Reserve. Apart from tourism, the main economic drivers of the region are construction, agriculture, and public sector.⁶⁶

Rideau Lakes includes more than 20 campgrounds and cottage rentals are also available.⁶⁷ Many of the accommodations are older and do not offer competitive prices and/or modern amenities, although some are undergoing renewal.⁶⁸ For recreation, tourists are often attracted to Jones' Falls (and lockstation), Davis Lock,

⁶⁴ Interview with Rideau Lakes, February 8, 2017

⁶⁵ Ibid.

⁶⁶ Ibid.

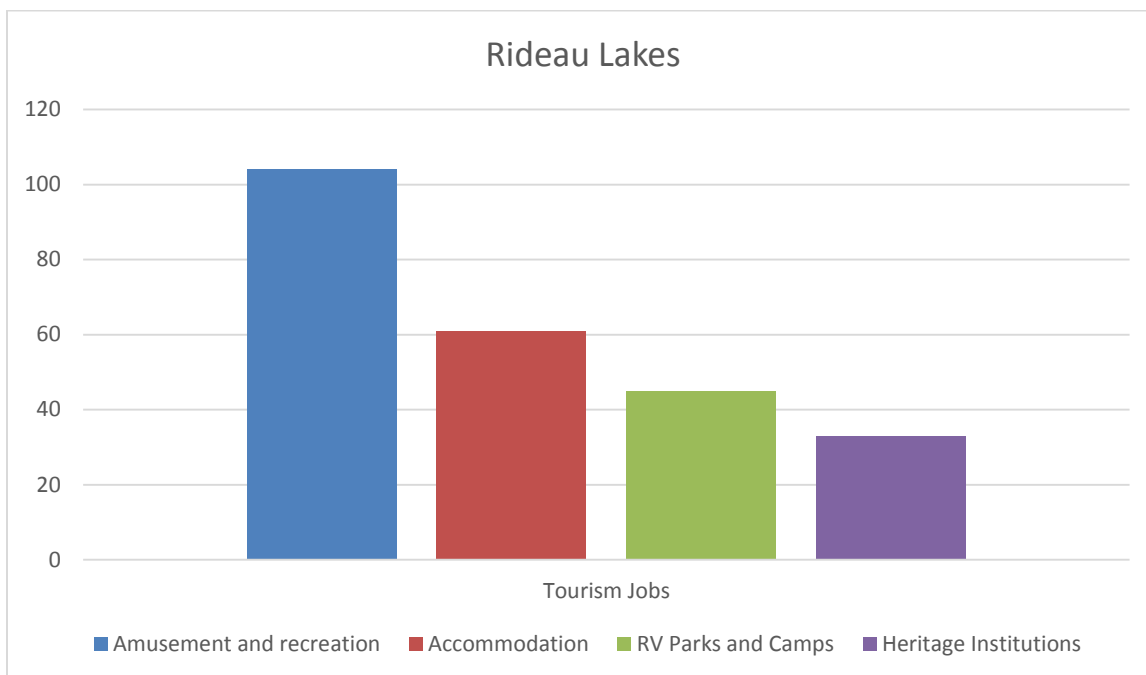
⁶⁷ Ibid.

⁶⁸ Ibid.

Chaffey's Lock, Cataraqui Trail, Foley Mountain, and Rock Dunder (from which one can see New York state on a clear day).⁶⁹ Main tourism events include an international speed skating competition in the winter, two large agricultural fairs, and many smaller events, mostly with a heritage focus.⁷⁰ Due to the prominent agricultural sector, there are also niche offerings, including artisanal cheeses and wineries.

After having rented or visited Rideau Lakes over many years, many retirees decide to move to the township.⁷¹ This process tends to bring new skills and capital into the region, which helps with economic and tourism development.

It is estimated that the tourism industry contributed approximately \$20.7 million to the municipality's GDP in 2016. Total employment in the township's tourism industry grew from 209 jobs in 2011 to 261 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the township are: other amusement and recreation industries (104 jobs); traveller accommodation (61 jobs); RV parks and recreation camps (45 jobs); and heritage institutions (33 jobs).

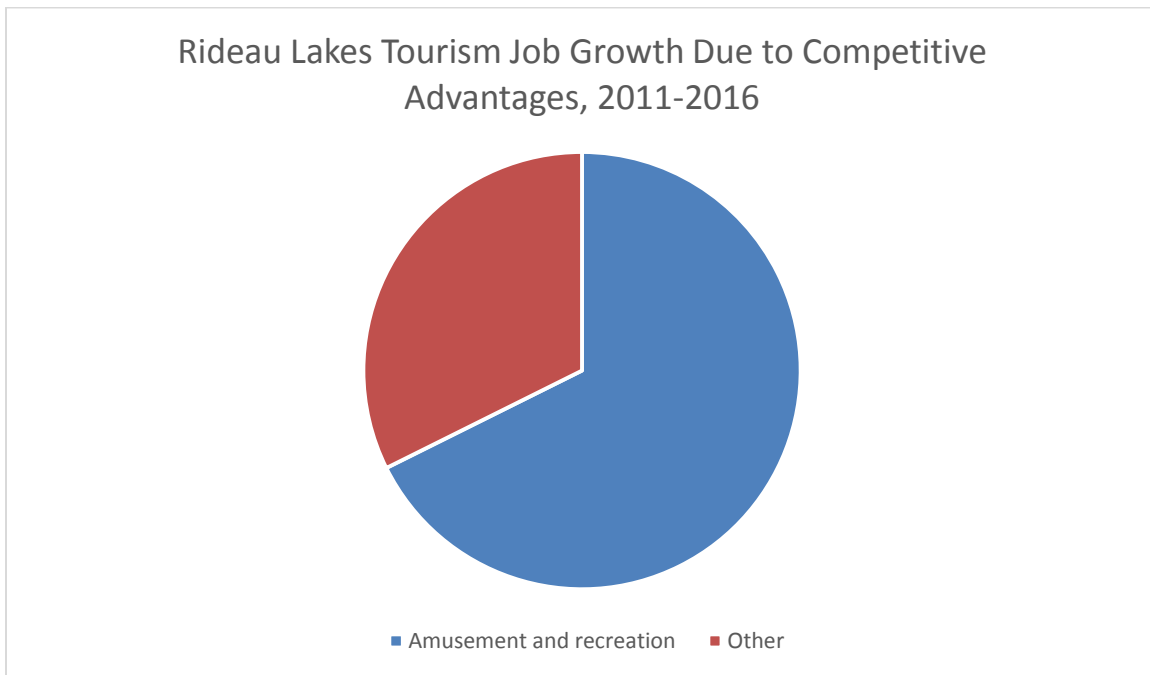


Overall, the township's tourism industry added 52 jobs between 2011 and 2016. Of this increase, 12 jobs can be attributed to national economic growth and 6 jobs can be attributed to growth in the tourism industry. As a result, a gain of 34 jobs can be attributed to the township's competitive advantages. The main contributor to job increases due to competitive advantages is other amusement and recreation industries (23 jobs). It should be noted that 18 jobs were lost in the traveller accommodation sector due to competitive disadvantages.

⁶⁹ Ibid.

⁷⁰ Ibid.

⁷¹ Ibid.



By far, RV parks and recreation camps (26.37 LQ) has a highest location quotient of all tourism sectors in the township. Other significant concentrations of employment include heritage institutions (14.50 LQ) and other amusement and recreation industries (7.04 LQ).

The tourism sector that has the deepest economic interdependencies and greatest impact on other industries in the township is the motion picture and video industries (1.1433). It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in Rideau Lakes.

Smiths Falls

Having Parks Canada’s headquarters located in town benefits Smiths Falls’ tourism industry on the Rideau Canal.⁷² The downtown core is situated next to the waterfront, providing easy access to shops and other amenities. The municipality also offers ample park space that is located walking distance from canal. Smiths Falls also has a waterfront trail that the city is looking to enhance.⁷³

Accommodations are mostly in the form of two larger chain hotels and smaller, lower-range motels.⁷⁴ The Victoria Park campsite also draws tourists to town on a seasonal basis.⁷⁵ Heritage assets serve as tourism attractors, including old buildings downtown and along the canal.⁷⁶ The municipality also has a farmer’s market

⁷² Interview with Smiths Falls, February 13, 2017.

⁷³ Ibid.

⁷⁴ Ibid.

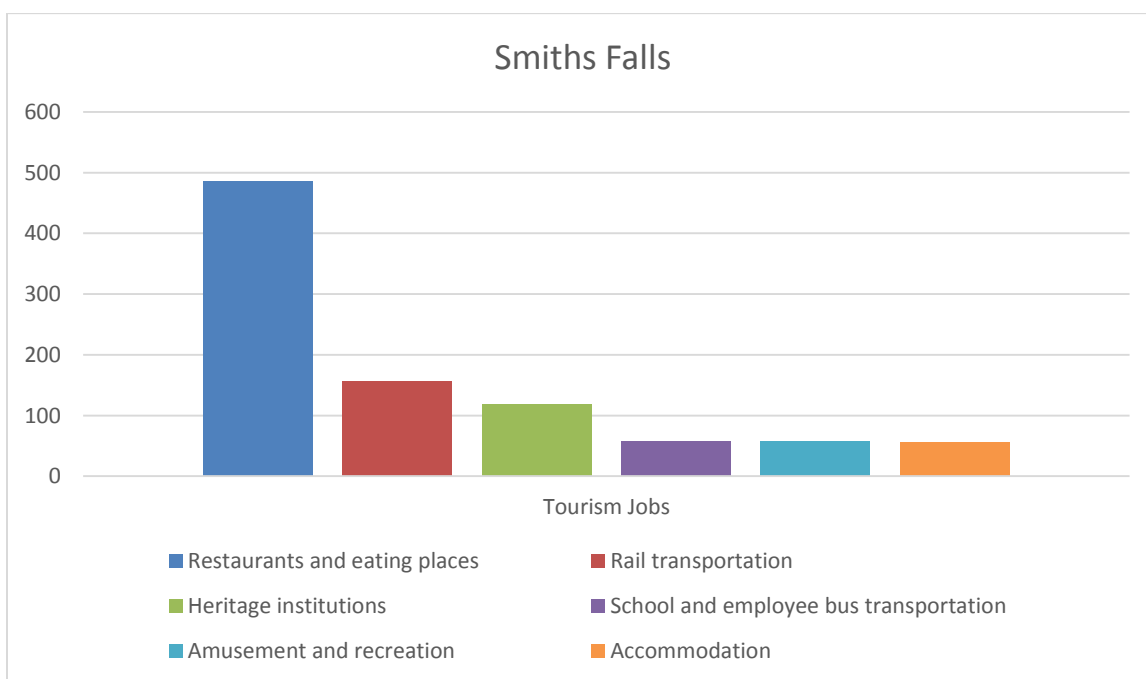
⁷⁵ Ibid.

⁷⁶ Ibid.

and art galleries. In terms of events, the town offers Paddlefest, the Healthy Living Festival, and the Voyageur Canoe Brigade.

In terms of demographics, Smiths Falls sees a wide variety of tourists. The Railway Museum sees a lot of younger families visit.⁷⁷ The Heritage House and genealogy tours are more of an older demographic.⁷⁸ Millennials tend to prefer the adventure tourism opportunities available in town, such as the Urban Jungle fitness and obstacle challenge.⁷⁹ Smiths Falls is currently working toward the goal of increasing visitor traffic from Ottawa and upstate New York.⁸⁰ The town has also identified the ‘Connected Explorer’ as the consumer segment with the greatest potential growth opportunities. This group is characterized as a confident, youthful, and optimistic group with a deep-seated need to travel and expose themselves to many new experiences and learning opportunities.⁸¹

It is estimated that the tourism industry contributed approximately \$76.9 million to the municipality’s GDP in 2016. Total employment in the town’s tourism industry grew from 849 jobs in 2011 to 968 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the township are: full-service restaurants and limited-service eating places (486 jobs); rail transportation (156 jobs); heritage institutions (118 jobs); school and employee bus transportation (58 jobs); other amusement and recreation industries (57 jobs); and traveller accommodation (56 jobs).



⁷⁷ Ibid.

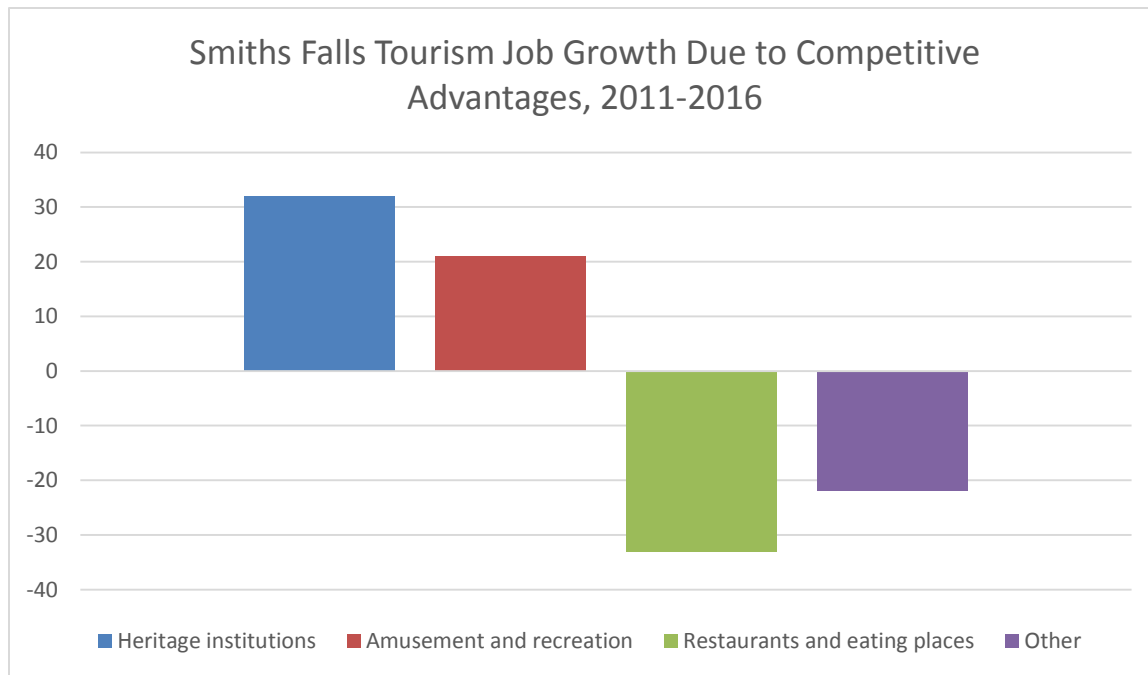
⁷⁸ Ibid.

⁷⁹ Ibid.

⁸⁰ Town of Smiths Falls, Economic Development & Tourism Plan, 2015-2018, July 2016.

⁸¹ Ibid.

Overall, the town’s tourism industry added 119 jobs between 2011 and 2016. Of this increase, 48 jobs can be attributed to national economic growth and 73 jobs can be attributed to growth in the tourism industry. As a result, a decline of 2 jobs can be attributed to the town’s competitive disadvantages. The main contributor to job decreases due to competitive disadvantages is full-service restaurants and limited-service eating places (-33 jobs).



Heritage institutions (12.90 LQ) has a highest location quotient of all tourism sectors in the town. Other significant concentrations of employment include rail transportation (9.74 LQ) and school and employee bus transportation (4.46 LQ).

The tourism sectors that have the deepest economic interdependencies and greatest impact on other industries in Smiths Falls are heritage institutions (1.1728) and other amusement and recreation industries (1.1382). It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in Smiths Falls.

South Frontenac

South Frontenac’s tourism industry is based on half of the township’s jurisdiction being covered by bodies of water.⁸² The Frontenac Provincial Park is within the township’s premises, allowing South Frontenac to benefit greatly from the cottage industry.⁸³ South Frontenac is also a major component of the Frontenac Arch

⁸² Interview with South Frontenac, February 21, 2017.

⁸³ Ibid.

Biosphere. The township has been developing the waterfront with marinas and trailer camps.⁸⁴ The Rideau Canal is located in the southeast corner of the district and does not play as great a role in the township's tourism industry.⁸⁵

Accommodations are mainly in the form of cottage rentals (including individual renting out their own cottages) and camping at the provincial park (in the Country Manor or Melody Lodge).⁸⁶ There are not many hotels or motels in the area. A number of Americans used to come to South Frontenac for fishing, but this has dissipated over the years.⁸⁷ Some events take place along the canal, but there is little infrastructure in place to get tourists to these events if they tie up their boats.⁸⁸ Taxis and public transportation are not available.⁸⁹

The local economy is primarily based on agriculture coupled with the reality that South Frontenac is mainly a bedroom community for individuals working at the base, hospital, prison, or university in Kingston.⁹⁰ Tourism is also important for the community, particularly small operators who rent out their cottages.⁹¹ The Loughborough Inn and the Holiday Manor have historically been employers for young people in the community.⁹²

It is estimated that the tourism industry contributed approximately \$18.9 million to the municipality's GDP in 2016. Total employment in the township's tourism industry grew from 197 jobs in 2011 to 238 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the township are: independent artists, writers and performers (74 jobs); full-service restaurants and limited-service eating places (41 jobs); and other amusement and recreation industries (22 jobs).

⁸⁴ Ibid.

⁸⁵ Ibid.

⁸⁶ Ibid.

⁸⁷ Ibid.

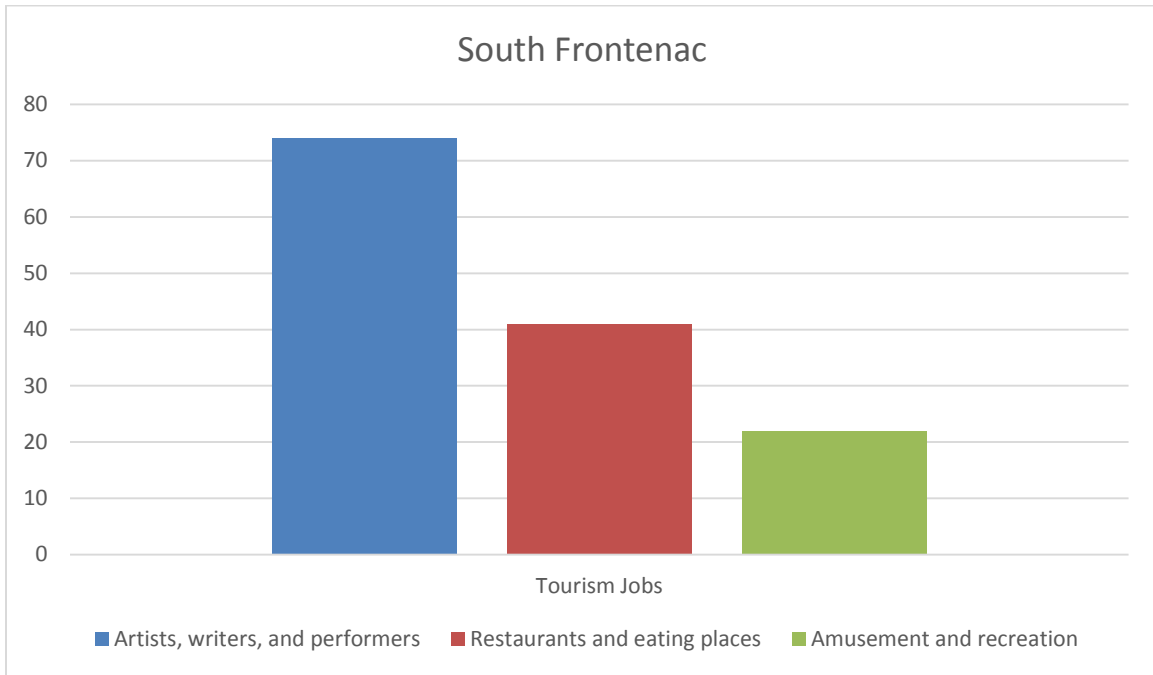
⁸⁸ Ibid.

⁸⁹ Ibid.

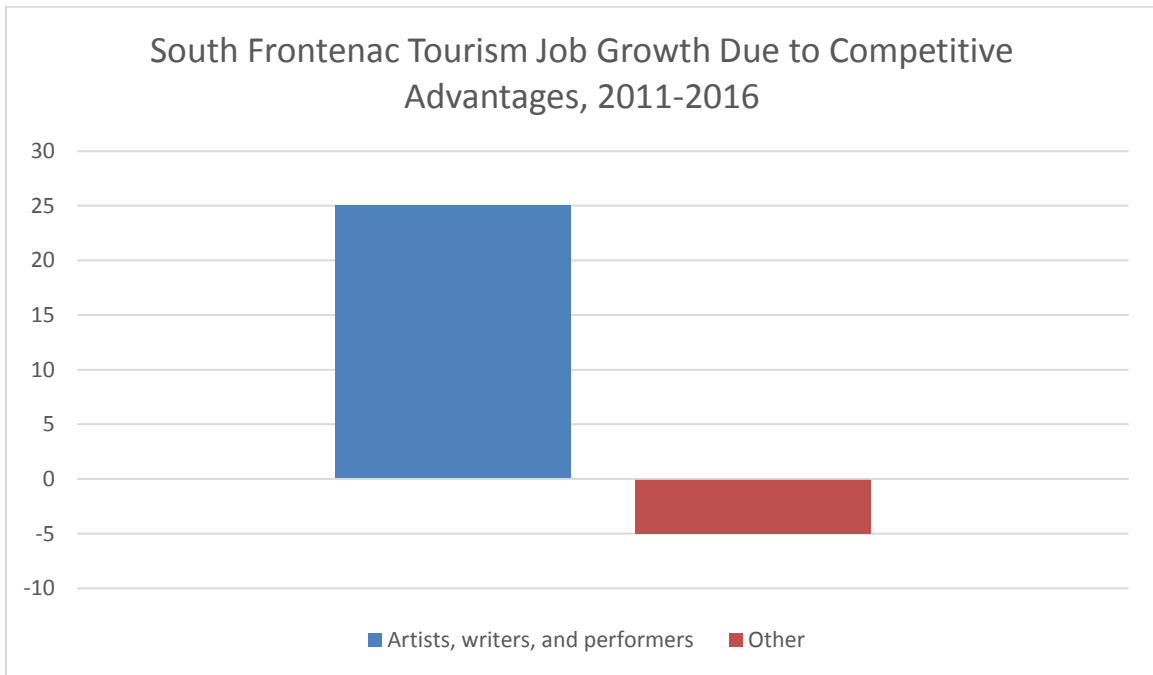
⁹⁰ Ibid.

⁹¹ Ibid.

⁹² Ibid.



Overall, the township’s tourism industry added 41 jobs between 2011 and 2016. Of this increase, 11 jobs can be attributed to national economic growth and 9 jobs can be attributed to growth in the tourism industry. As a result, a gain of 20 jobs can be attributed to the township’s competitive advantages. The main contributor to job increases due to competitive advantages is independent artists, writers and performers, contributing 25 new jobs.



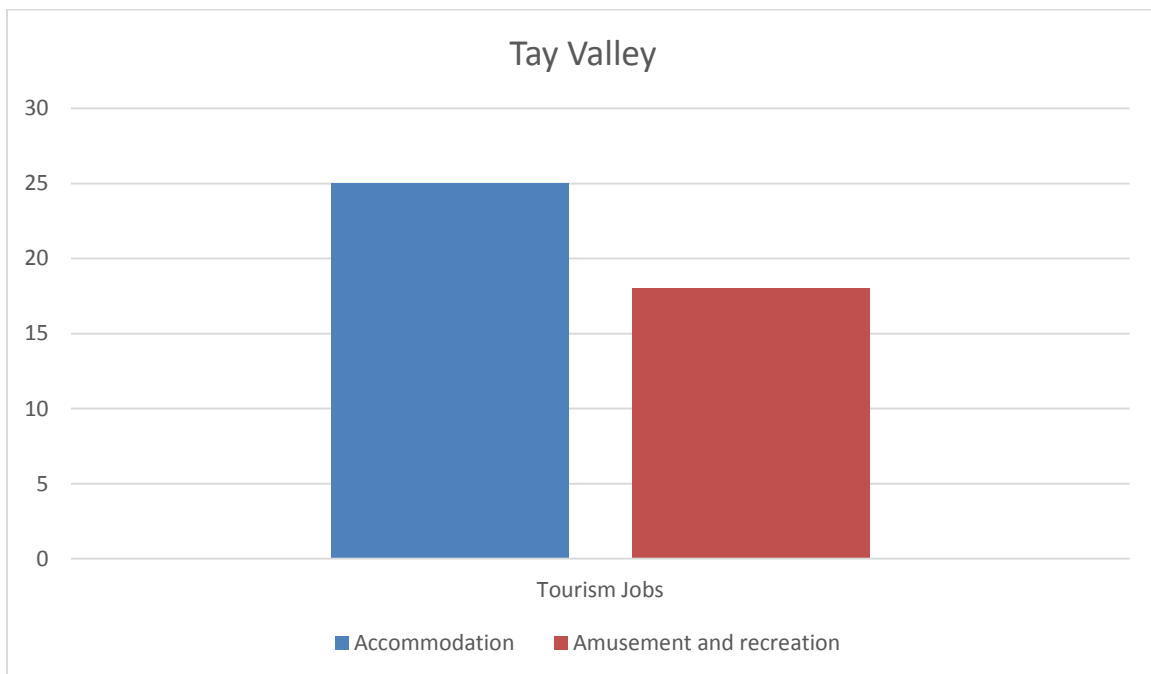
Ground transportation tourism sectors have the highest location quotient in South Frontenac. Interurban and rural bus transportation (12.62 LQ); other transit and ground passenger transportation (11.52 LQ); and the charter bus industry (10.53 LQ) lead these sectors. Another significant concentration of employment is independent artists, writers and performers (7.28 LQ).

The tourism sectors that have the deepest economic interdependencies and greatest impact on other industries in South Frontenac are rail transportation (1.1839); urban transit systems (1.1834); and traveller accommodation (1.1078). It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in South Frontenac.

Tay Valley

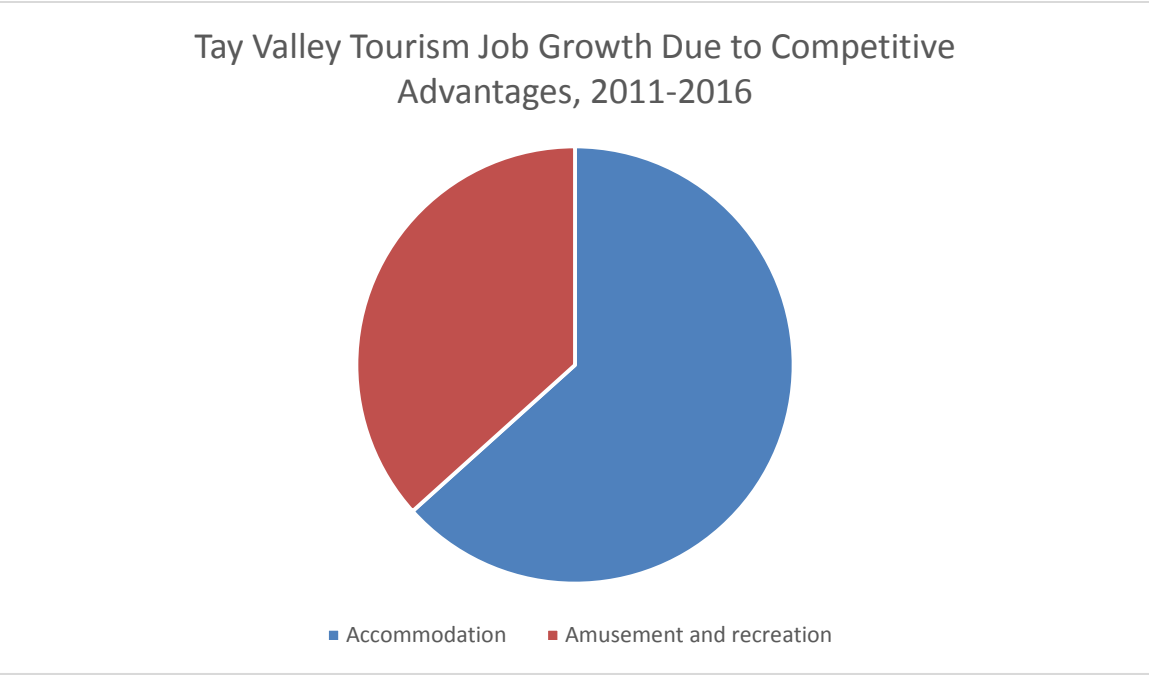
Tay Valley is a historic homesteading and agricultural area which today offers rural, recreational, agricultural, and tourism opportunities in an environment that is rich with natural and heritage attributes. The most significant natural feature of the community is its 32 lakes and 8 rivers.⁹³

It is estimated that the tourism industry contributed approximately \$5.2 million to the municipality's GDP in 2016. Total employment in the Tay Valley's tourism industry grew from 41 jobs in 2011 to 65 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the town are traveller accommodation (25 jobs) and other amusement and recreation industries (18 jobs).



⁹³ Tay Valley Township, Official Plan, February 3, 2016.

Overall, Tay Valley’s tourism industry added 24 jobs between 2011 and 2016. Of this increase, 2 jobs can be attributed to national economic growth and 1 job can be attributed to growth in the tourism industry. As a result, a gain of 21 jobs can be attributed to the town’s competitive advantages. The main contributors to job increases due to competitive advantages are traveller accommodation (19 jobs) and other amusement and recreation industries (10 jobs).



Scenic and sightseeing transportation, land (5.61 LQ) has the highest location quotient in Tay Valley. Other significant concentrations of employment are traveller accommodation (3.47 LQ) and drinking places (alcoholic beverages) (3.46 LQ).

The tourism sector that has the deepest economic interdependencies and greatest impact on other industries in Tay Valley is heritage institutions (1.1070). It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in Tay Valley.

Westport

The Village of Westport is at the top of the Frontenac Arch Biosphere, midway between Ottawa and Kingston. The village includes the inner section of the biosphere and the Rideau Canal. Tourism is the largest economic driver for the village.⁹⁴ The village also acts as a hub for surrounding farming communities, which supports the

⁹⁴ Interview with Village of Westport, February 10, 2017.

local economy off-season in the winter.⁹⁵ Community surveys indicate that the village's location is its main strength and that economic opportunities exist in the areas of recreation and harbour development.⁹⁶

Westport is a popular tourist location during the summer months. Visitors arrive via the canal to see live music at local bars and restaurants seven nights a week.⁹⁷ Westport is the only municipality that still puts on the Blues on the Rideau event.⁹⁸ A number of visitors moor at the harbor for several days, taking part in the village's activities.⁹⁹ The Cove Inn offers accommodation and a spa experience in addition to live music. For accommodation, visitors also use cottage rentals, a local motel, and a golf course with fractional ownership residences.¹⁰⁰ The number of available bed and breakfasts has declined over the years.¹⁰¹ During the winter months, some visitors also arrive by snowmobile.¹⁰²

The main attractor of tourists to Westport is niche shopping.¹⁰³ There are several women's clothing stores that attract visitors from Ottawa and Kingston. The independent local grocery store has also won awards.¹⁰⁴ Westport also offers four year-round restaurants in the village, one seasonal restaurant, a coffee shop, and two ice cream parlors.¹⁰⁵ Westport also has a winery and art shows throughout the year.

It is estimated that the tourism industry contributed approximately \$8.6 million to the municipality's GDP in 2016. Total employment in Westport's tourism industry grew from 105 jobs in 2011 to 108 jobs in 2016. The tourism sectors that contribute the greatest amount of jobs in the town are traveller accommodation (46 jobs) and full-service restaurants and limited-service eating places (21 jobs).

⁹⁵ Ibid.

⁹⁶ Village of Westport, Strategic Plan 2015-2018, April 1, 2015.

⁹⁷ Interview with Village of Westport, February 10, 2017.

⁹⁸ Ibid.

⁹⁹ Ibid.

¹⁰⁰ Ibid.

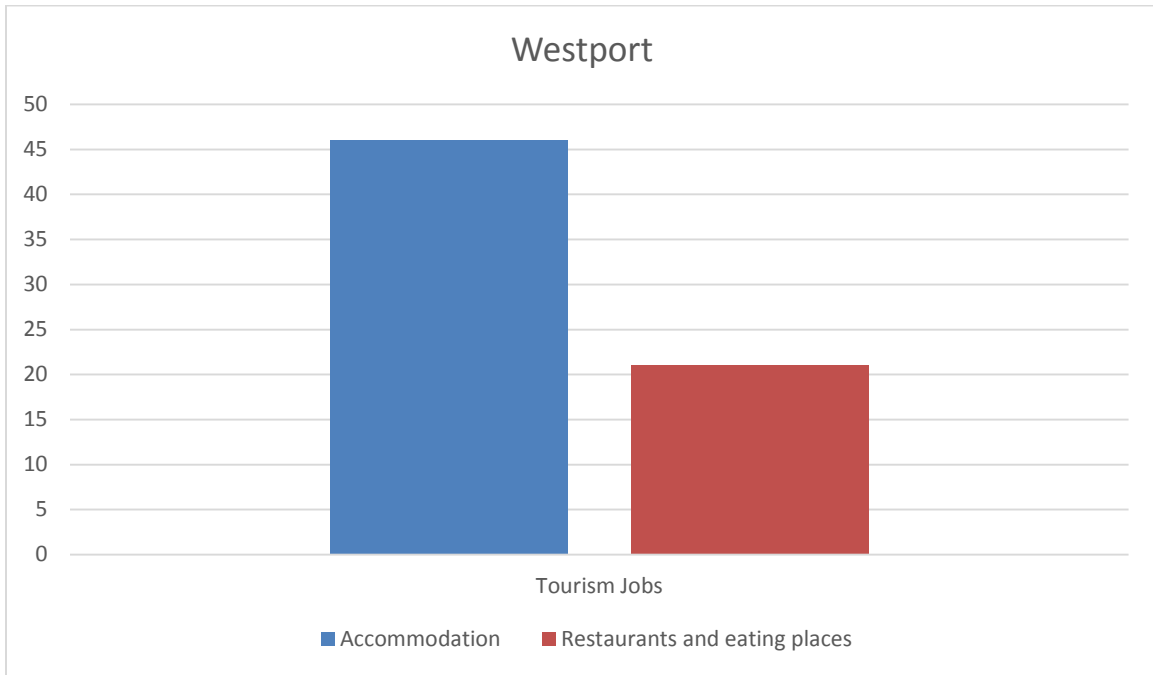
¹⁰¹ Ibid.

¹⁰² Ibid.

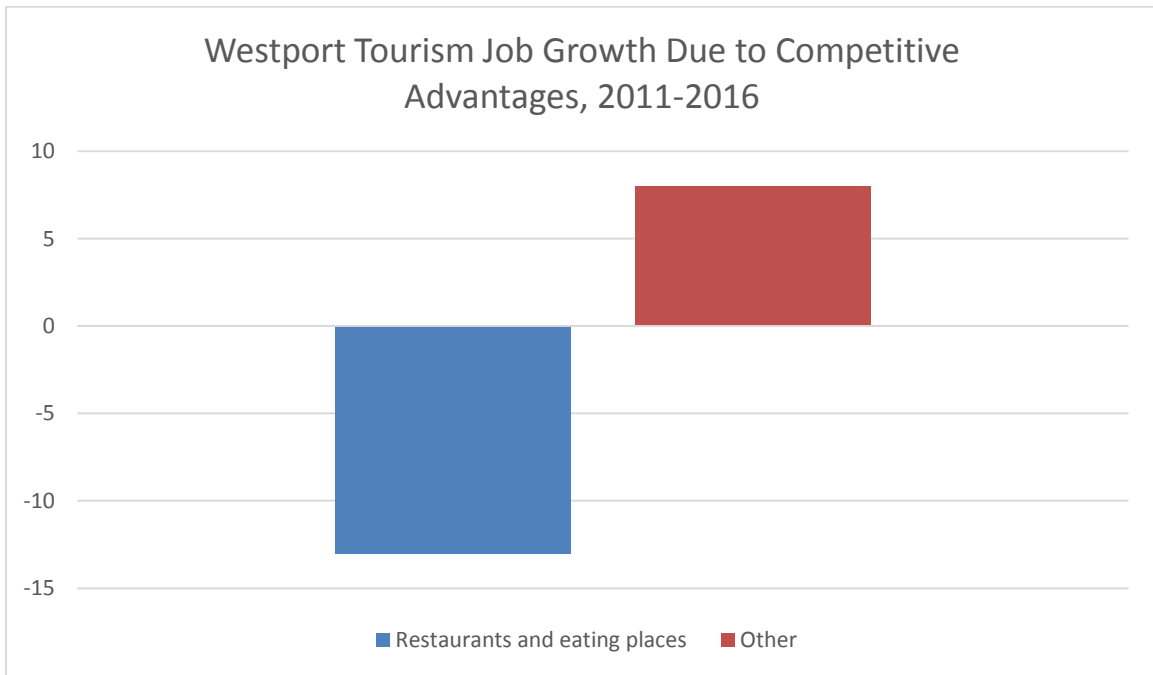
¹⁰³ Ibid.

¹⁰⁴ Ibid.

¹⁰⁵ Ibid.



Overall, Westport’s tourism industry added 3 jobs between 2011 and 2016. Of this increase, 6 jobs can be attributed to national economic growth and 2 jobs can be attributed to growth in the tourism industry. As a result, a loss of 5 jobs can be attributed to the village’s competitive disadvantages. The main contributor to job losses due to competitive disadvantages is full-service restaurants and limited-service eating places (-13 jobs).



By far, RV parks and recreational camps (13.89 LQ) has the highest location quotient amongst tourist sectors. Scenic and sightseeing transportation, land (5.61 LQ) has the highest location quotient in Westport. Other significant concentrations of employment are traveller accommodation (6.35 LQ) and heritage institutions (5.14 LQ).

The tourism sector that has the deepest economic interdependencies and greatest impact on other industries in Westport are heritage institutions (1.0951) and other amusement and recreation activities (1.0925). It should be noted that no tourism sectors have large spillover effects on other sectors of the economy in Westport.

4) Economic Feasibility

The RHRTA is comprised of diverse communities in various economic positions and possessing different economic assets. Some communities possess competitive advantages in tourism on the water, where investments in these areas will have significant spinoff economic benefits for other sectors of the local economy. Other communities may not enjoy these strengths in water tourism - or even have a significant portion of their GDP derived from tourism - and focusing on developing these areas will not achieve the greatest return on investment.

As a result, the most feasible strategy is focusing on the investments that will have the greatest economic impact in each individual community. For many communities, this will translate into emphasizing the Rideau Canal, or paddling more specifically, as a number of municipalities have existing strengths and assets in this area. For other, strategic investments may be targeted at developing a broader tourism ecosystem along the Rideau Heritage Route. This may involve focusing on building tourist accommodations, land transportation, or developing artistic performances. These investments may also benefit the region as a whole since providing diverse tourism experiences will attract different tourist demographics. Additionally, by providing tourists with more options, visitors will be more likely to schedule a longer trip spend more tourism dollars in the region.

A table is provided below to assist communities with aligning their tourism investments with their competitive advantages, interdependent sectors, and the size of their tourism industries.

Community	High Location Quotient Sectors	High Interdependency Sectors	Tourism GDP
Rideau Heritage Route			
Regional Economic Impact	Scenic and sightseeing transportation, water (5.95) Interurban and rural bus transportation (3.94) Other transit and ground passenger	Deep sea, coastal and Great Lakes water transportation (2.0904) Non-scheduled air transportation (1.9392) Scheduled air transportation (1.9030)	\$695M

Community	High Location Quotient Sectors	High Interdependency Sectors	Tourism GDP
	transportation (3.61) RV parks and recreational camps (2.51) Heritage institutions (2.39) Gambling industries (2.38)	Inland water transportation (1.7810)	
Rideau Heritage Corridor (with Ottawa and Kingston)	Scenic and sightseeing transportation, water (2.00)	Inland water transportation (1.9943) Deep sea, coastal and Great Lakes water transportation (1.8637) Scheduled air transportation (1.8677) Non-scheduled air transportation (1.8650) Rail transportation (1.7737) Motion picture and video industries (1.7743) Heritage institutions (1.5813) Scenic and sightseeing transportation, water (1.3803)	\$5.5B
Rideau Heritage Corridor (without Ottawa and Kingston)	Heritage institutions (4.51) Interurban and rural bus transportation (4.29) RV parks and recreational camps (3.46) School and employee bus transportation (3.20) Other transit and ground passenger transportation (3.09) Scenic and sightseeing transportation, water (2.02) Other amusement and recreation	Non-scheduled air transportation (1.7419) Urban transit systems (1.4329) Gambling industries (1.4654)	\$309M

Community	High Location Quotient Sectors	High Interdependency Sectors	Tourism GDP
	industries (2.19)		
Counties			
United Counties of Leeds and Grenville	Scenic and sightseeing transportation, water (9.41) RV parks and recreational camps (7.97) Interurban and rural bus transportation (4.97) Heritage institutions (3.84)	Non-scheduled air transportation (1.6033) Scheduled air transportation (1.5979) Rail transportation (1.5462) Urban transit systems (1.3545) Gambling industries (1.3865)	\$183M
United Counties of Leeds and Grenville (Rideau Heritage corridor)	RV parks and recreational camps (8.94) Interurban and rural bus transportation (8.14) Scenic and sightseeing transportation, water (5.47) Heritage institutions (3.67) Other amusement and recreation industries (3.54)	Non-scheduled air transportation (1.4960) Rail transportation (1.4945) Urban transit systems (1.3282) Gambling industries (1.3443)	\$135M
Lanark County	Other transit and ground passenger transportation (4.69) Interurban and rural bus transportation (2.72) Scenic and sightseeing transportation, water (3.30) Independent artists, writers and performers (3.20) Other amusement and recreation activities (2.48)	Deep sea, coastal and Great Lakes water transportation (1.7024) Heritage institutions (1.6714) Motion picture and video industries (1.6285) Scheduled air transportation (1.6203) Non-scheduled air transportation (1.5946) Rail transportation (1.4685)	\$186M

Community	High Location Quotient Sectors	High Interdependency Sectors	Tourism GDP
Lanark County (Rideau Heritage corridor)	Other transit and ground passenger transportation (6.38) School and employee bus transportation (2.60) Independent artists, writers and performers (2.61)	Heritage institutions (1.1011)	\$78M
Municipalities			
Drummond/ North Elmsley	Traveller accommodation (5.88) School and employee bus transportation (5.35) Other amusement and recreation (4.47) Drinking places (alcoholic beverages) (4.24) Heritage institutions (3.62)	Heritage institutions (1.1266)	\$6.2M
Leeds and Thousand Islands	Scenic and sightseeing transportation, water' (31.50) Traveller accommodation (9.73) Other amusement and recreation industries (7.34) Travel arrangement and reservation services (6.55) Amusement parks and arcades (6.43) RV parks and recreational camps (5.50)	Rail transportation (1.2115) Non-scheduled air transportation (1.2012)	\$36.2M

Community	High Location Quotient Sectors	High Interdependency Sectors	Tourism GDP
Merrickville-Wolford	RV parks and recreational camps (9.96) Performing arts companies (7.05) Spectator sports (6.50) Other amusement and recreation industries (3.12) Heritage institutions (3.01)	Gambling industries (1.1237) Other amusement and recreation activities (1.1027)	\$9.1M
North Grenville	Interurban and rural bus transportation (15.88) School and employee bus transportation (5.62) RV parks and recreational camps (4.05)	Urban transit systems (1.2417)	\$60.4M
Rideau Lakes	RV parks and recreation camps (26.37) Heritage institutions (14.50) Other amusement and recreation industries (7.04)	Motion picture and video industries (1.1433)	\$20.7M
Smiths Falls	Heritage institutions (12.90) Rail transportation (9.74) School and employee bus transportation (4.46)	Heritage institutions (1.1728) Other amusement and recreation industries (1.1382)	\$76.9M
South Frontenac	Interurban and rural bus transportation (12.62)	Rail transportation (1.1839)	\$18.9M

Community	High Location Quotient Sectors	High Interdependency Sectors	Tourism GDP
	<p>Other transit and ground passenger transportation (11.52)</p> <p>Charter bus industry (10.53)</p> <p>Independent artists, writers and performers (7.28)</p>	<p>Urban transit systems (1.1834)</p> <p>Traveller accommodation (1.1078)</p>	
Tay Valley	<p>Scenic and sightseeing transportation, land (5.61)</p> <p>Traveller accommodation (3.47)</p> <p>Drinking places (alcoholic beverages) (3.46)</p>	<p>Heritage institutions (1.1070)</p>	\$5.2M
Westport	<p>RV parks and recreational camps (13.89)</p> <p>Scenic and sightseeing transportation, land (5.61)</p> <p>Traveller accommodation (6.35)</p> <p>Heritage institutions (5.14)</p>	<p>Heritage institutions (1.0951)</p> <p>Other amusement and recreation activities (1.0925)</p>	\$8.6M

SECTION 3: PRODUCT FEASIBILITY STUDY

Summary of Product Feasibility Study Section

Findings:

- *RHRTA enjoys a number of tourism assets that can be leveraged in the development of a world-class paddling destination*
- *RHRTA enjoys a number of land-based tourism assets that can be leveraged for economic opportunities in addition to paddling*
- *Trends in the industry and changing demographic groups have resulted new opportunities in the tourism sector*

Risks:

- *Competition is strong in the paddling tourism market, with significant competitors in Southern Ontario and Upstate New York*
- *Paddlers may not spend as many tourism dollars as some other demographic groups of tourists*

Assumptions:

- *Le Boat will be attracting a large number of international tourists from a new market starting in 2018*

Gaps:

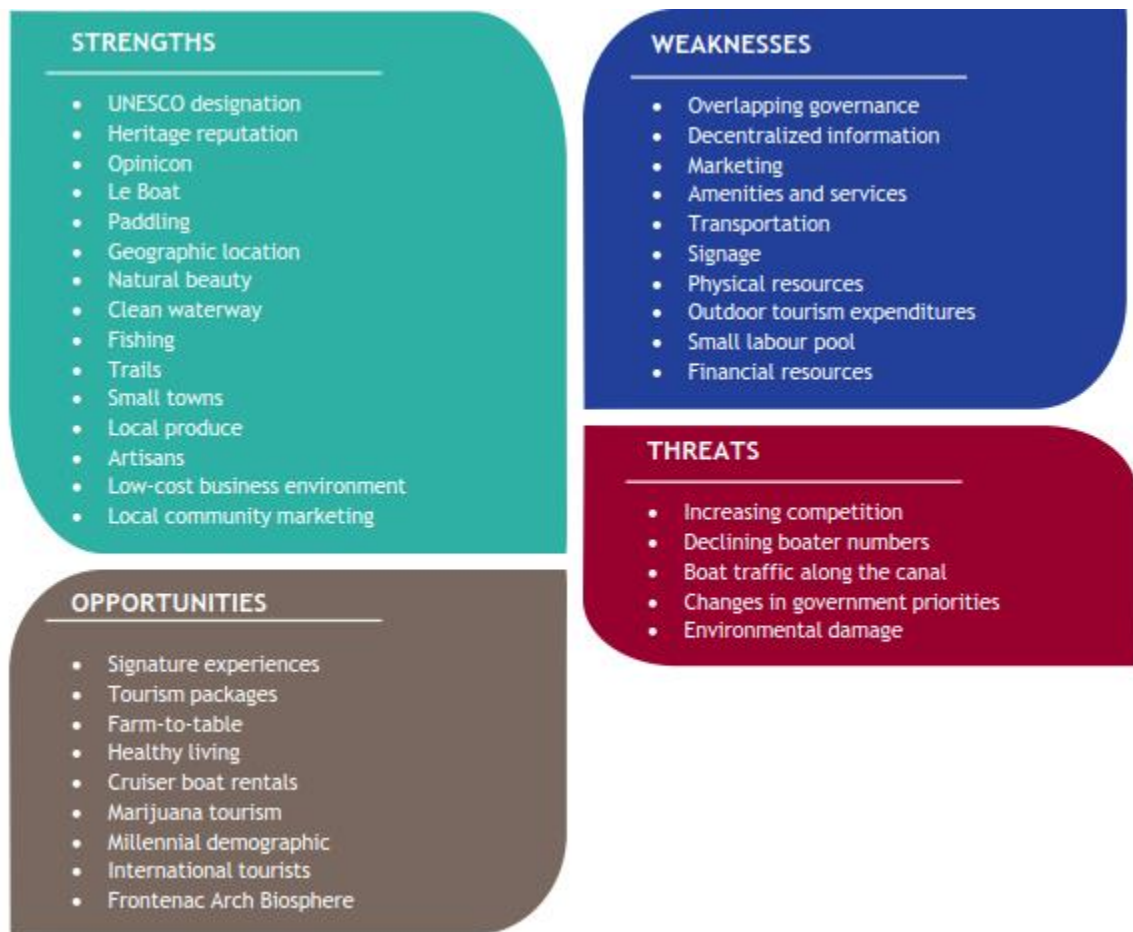
- *Legislation regarding the legalization of marijuana is pending, making marijuana tourism an unknown factor in the region's tourism development.*

5) Review and evaluation of existing market information

SWOT Analysis

A comprehensive environmental scan of RHRTA and the tourism industry was conducted through extensive stakeholder consultations in the region. These included 20 individual interviews: 12 with municipal government stakeholders and 8 with private sector tourism operators. A total of three workshop sessions were held: one with municipal government stakeholders, one with private sector tourism operators, and one open to the general public. Overall, over 40 stakeholders were consulted through the three workshops.

The findings of the environmental scan have been collated into an analysis of RHRTA's internal strengths and weaknesses, as well as the organization's external opportunities and threats (SWOT).



Strengths

- **UNESCO designation:** The Rideau Canal was designated as a UNESCO world heritage site in 2007. The canal was listed as the best preserved canal in North America from the great canal-building era of the early 19th century to remain operational along its original line with most of its original structures intact. The UNESCO designation demonstrates that the canal has historical, cultural, or scientific significance and that the area offers a world-class heritage site.
- **Heritage reputation:** Villages along the canal are historically significant to the formation of Canada. The historical narratives associated with the canal can be leveraged to attract tourists. Many of these villages have kept their historic cores, providing ample assets for heritage tourism.
- **Opinicon:** The revitalization of the Opinicon resort at Chaffey's Lock has resulted in a noticeable increase in employment in the tourism industry in the region. A number of municipalities and communities circumscribe the resort, also resulting in spillover tourism business in the region. Many tourism businesses in the accommodation section have expressed an uptick in business due to the overflow from the Opinicon when the resort is completely booked.
- **Le Boat:** Europe's largest self-drive boating company - Le Boat - has recently decided to make Smiths Falls its North American headquarters. The company will be investing \$16M in the region over the next 5

years. Le Boat's operations on the Rideau Canal will bring a large number of high-income international tourists to the region. This significant investment has also inspired the towns along the Rideau Heritage Route to consider further investments in the canal.

- Paddling: The Rideau Canal provides an ideal paddling destination for tourists. Beginners, leisure paddlers, and families find the canal ideal for kayaking, while the Rideau Canal is ranked as one of the best canoeing destinations in Canada. In addition, paddlers can travel on the canal from Ottawa to Kingston with minimal portaging.
- Geographic location: The Rideau Heritage Route is bookended between two major urban centres in Ottawa and Kingston. Both cities are also prominent tourism destinations within Eastern Ontario, providing a large tourism market in the region from which the region benefits. The small town character of the Rideau Heritage Route provides a positive tourism brand that is at the same time the middle of nowhere and central to major hubs.
- Natural beauty: The scenic beauty of the canal and Rideau Corridor offers many opportunities for tourism experiences in a natural setting; such as bird watching, paddling, and boats traveling through the locks. The combination of the natural environment and historical assets is a unique strength for the region. In addition, the Rideau Heritage Route provides access to many lakes and rivers that are excellent paddling routes.
- Clean waterway: The Rideau Canal offers a relatively clean waterway for various boating and tourism activities. Specifically, the stretch of the canal along the Rideau Heritage Route is significantly cleaner compared to sections of the canal in Ottawa, where contaminants were found.
- Fishing: The lakes and rivers of the Rideau Waterway offer great fishing opportunities. Species caught along the length of the Rideau Waterway include Largemouth Bass, Smallmouth Bass, Northern Pike, Lake Trout, Yellow Perch, Black Crappie, Muskellunge, and Walleye.
- Trails: A number of trails currently exist for cycling and hiking in the area. These tourism assets tend to attract visitors seeking outdoor activities. Many trails for snowmobilers, four-wheelers, and cross-country skiers are also available in the winter.
- Small towns: Small town feel of the villages and towns along the canal attracts visitors from larger urban centres. Many international tourists are also attracted to experiencing small towns in Canada with a historical significance and natural beauty. Small town residents have also proven to be some of the greatest ambassadors for the region by providing a friendly and welcoming environment.
- Local produce: The Rideau Heritage Route has the most prominent agricultural sector within Eastern Ontario and one of the most important agricultural sectors in the province. Local produce, wineries, and breweries provide a valuable tourism asset.
- Artisans: The historic and natural beauty of the region has developed a groups of artisans specializing in visual arts and craftwork. These artisans provide a retail and boutique market for tourists and also contribute to the local small town heritage appeal.
- Low-cost business environment: The small town and rural locations along the Rideau Heritage Route provide low taxes, a lower cost of living, and a lower cost of labour for businesses. According to the stakeholders consulted, these aspects have proven to be valuable in terms of labour and investment attraction and retention.

- Local community marketing: Local governments have demonstrated a concerted effort to work together to promote tourism in the region. Local governments have also demonstrated the willingness to provide community referrals to tourists.

Weaknesses

- Overlapping governance: Leadership of the tourism sector in the region involves a number of overlapping organizations. The complex governance structure combining the Rideau Heritage Route Tourism Association, three Regional Tourism Organizations, numerous municipal governments and chambers of commerce leads to confusion about leadership and decision-making. A centralized body is needed to champion tourism in the area, coordinate partnerships, attract investment, and communicate what the Rideau Corridor has to offer.
- Decentralized information: There is no central repository of information on tourism attractions and activities in the region. This situation makes it difficult for tourists to plan their journeys and navigate the region. Additionally, this situation makes it more difficult for the region to communicate a unified and cohesive tourism brand.
- Marketing: The limited resources results in a poor job of marketing the Rideau Heritage Route to potential tourists from Ottawa and Kingston. Many residents of Ottawa are unaware that the Rideau Canal extends beyond the National Capital Region. The online presence of the Rideau Heritage Route is also negligible. Marketing the area as a whole would be helpful in ensuring a synthesized and simplified message.
- Amenities and services: Many tourism amenities and services are not to the standard that would attract certain tourist demographics, such as millennials, baby boomers and those with higher household incomes. In particular, more affordable and updated accommodations are needed. The provision of more upscale restaurant and bar options are also advisable.
- Transportation: Apart from boating on the canal, driving is the only way to travel around the region. This requires a number of tourists from more distant locations to rent a car. Public transportation and alternative transportation options are not readily available.
- Signage: The signage that exists along the Rideau Heritage Route is confusing to tourists or non-existent in some cases. This weakness is compounded by the fact that a vehicle is the primary mode of transportation in the region. Creating better signage would be useful in guiding tourists and developing a unified identity for tourism in the region.
- Physical resources: Some of the infrastructure on the canal and in the region needs updating. Additionally, some infrastructure is lacking that needs to be built. Road quality, marinas, docks and broadband internet are particular targets for increased infrastructural investments. Governments need to provide leadership in investing in infrastructure to promote tourism in the region.
- Outdoor tourism expenditures: Though many tourists are attracted to the region for outdoor activities - such as paddling, cycling, and hiking - a number of stakeholders mentioned that these tourists do not spend a large amount of money when traveling in the region. Many own their equipment, bring their own food, and choose to camp instead of staying in more expensive accommodations. The active nature of these outdoor tourism experiences makes shopping in the region more prohibitive.

- Small labour pool: There is a small and stable population in the area. The revitalization of the Opinicon also created 100 jobs that did not previously exist. The ability of the labour market in the region to supply enough quality workers for an expansion of the tourism sector is unknown.
- Financial resources: Limited financial resources have been provided by the municipalities. Funds provided by the municipalities were previously utilized to cover operations with a small portion for marketing. Kingston initially provided funds and discontinued early into RHRTA's development. Ottawa has previously done a MOU with RHRTA but no funds were provided. In 2017, Perth, Lanark County, and Tay Valley made the decision to discontinue their funding. RHRTA's 2017 budget is \$46,000. Parks Canada's investment and other funding programs have changed over the past several years that are now project based and require 50% matching funding with the ability to cash flow the projects in some cases. Due to the limited financial funds, the previous physical resources were cut in order to undertake projects such as this report and maximizing leveraging of funds. Private sector investment in RHRTA has been minimal.

Opportunities

- Signature experiences: Destination Canada's Canadian Signature Experiences (CSE) are a collection of once-in-a-lifetime travel experiences found only in Canada. Experiences are the new 'currency' that differentiates tourism businesses and destinations around the world. Highlighting some of the country's most innovative products for international visitors, CSEs show the world what Canada's tourism brand is all about. Achieving CSE designation would, therefore, help the Rideau Heritage Route promote its tourism experience internationally.
- Tourism packages: Tourism activities in the region are not currently grouped together as tourism packages. Developing these packages can increase tourism in region, promote cross-selling from one tourism operator to another, and create a unified tourism brand.
- Farm-to-table: The prominent agricultural sector along the Rideau Heritage Route can be leveraged to meet the demand for locally sourced food in local restaurants. These farm-to-table experiences are popular in the tourism sector, particularly amongst millennial tourists.
- Healthy living: The increasing popularity of health and wellness in consumer markets creates an opportunity for the tourism industry along the Rideau Heritage Route. The combination of outdoor activities and fresh produce can be a compelling brand for the region's tourism sector development.
- Cruiser boat rentals: Boat ownership has become prohibitively more expensive over the past two decades. As a result, there is a large opportunity in the market for cruiser boat rentals along the Rideau Canal. The Rideau Heritage Route has the opportunity to leverage this trend to increase tourism on the canal.
- Marijuana tourism: Canopy Growth Corporation - the first federally regulated, publicly traded cannabis producer in North America - is located along the Rideau Heritage Route in Smiths Falls. This presents an opportunity to target a new tourism sector in marijuana tourism, pending legislation. Apart from attracting marijuana tourists, tourism operators in the region can also build marijuana tourism businesses around this brand.
- Millennial demographic: Millennials are the fastest growing travel segment and one of the largest and most influential groups of travellers worldwide. Millennial travel is no longer regarded as a niche market

but rather as a catalyst for future growth. Young travellers have played a key role in the emergence of new (or renewed) Canadian travel destinations in recent years. Connected, tech-savvy, independent and intrepid, young travellers tend to stay ahead of travel trends and often create the initial buzz around emerging tourism hotspots due to their remarkable ability to attract their peers and others to their preferred destinations.

- International tourists: The arrival of Le Boat to the Rideau Canal will bring an influx of international tourists to the region. The Rideau Canal's designation as a UNESCO World Heritage Site can also be leveraged to attract an increasing number of tourists from the international marketplace. The Rideau Heritage Route also has the opportunity to capitalize on Canada's current positive global reputation to increase tourism from other regions of the world and increase the number of Canadians traveling domestically to the region.
- Frontenac Arch Biosphere: The Frontenac Arch Biosphere is located in the Thousand Islands-Frontenac Arch area. An ancient granite bridge, called the Frontenac Arch, runs from the northern Canadian Shield to the Adirondack Mountains in the United States. The Canadian area was designated a UNESCO Biosphere Reserve. The presence of a second UNESCO designated site in the same region provides a unique opportunity for tourism attraction.

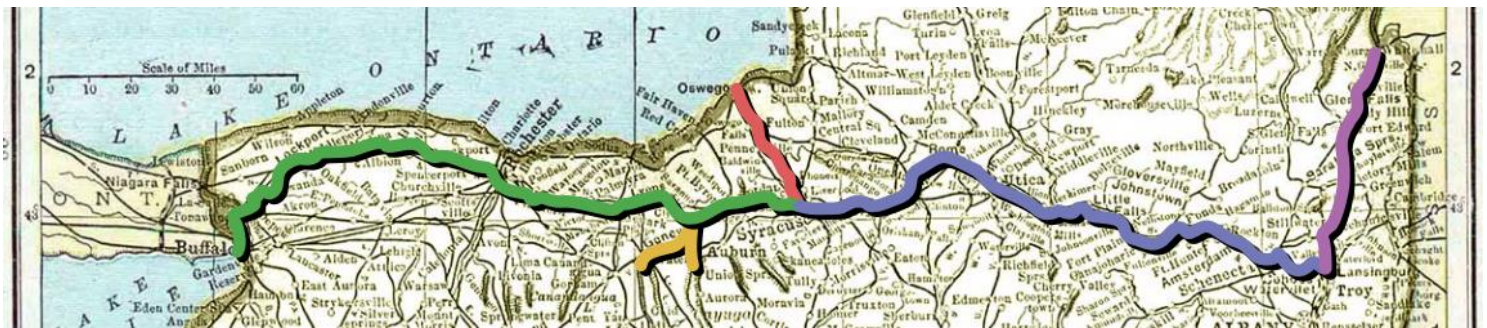
Threats

- Increasing competition: There is increasing competition in the tourism sector in the region with some recent large-scale investments (Le Boat, Opinicon). A number of other municipalities in the province and across Canada have already begun to develop their tourism industries through agri-tourism and place-based products, resulting in a market that may become saturated.
- Declining boater numbers: Boating numbers on the Rideau Canal have been declining for over two decades and show no sign of rebounding. Boat ownership has become prohibitively more expensive over this period, resulting in a smaller tourism market for boat owners.
- Boat traffic along the canal: Promoting Le Boat and paddling on the canal will increase boat traffic. This can negatively impact the scenic beauty of the canal for tourists. In addition, many residents may not appreciate the changing character of the canal and their region.
- Changes in government priorities: Success in developing tourism along the Rideau Canal requires the alignment of federal, provincial, and municipal government priorities. Changes in governments or policy shifts may result in a disruption of the delicate balance required between these stakeholders for the effective execution of a tourism strategy.
- Environmental damage: Increasing boat traffic may cause environmental damage canal and increase the water pollution. Increasing the amount of tourists to the area may also result in an increase in the environmental footprint of the region. These development may harm the region's reputation for outdoor activities and natural beauty.

6) A Vision of Success: Tourism Along the Erie Canal

A case study on tourism on the Erie Canal System has been conducted to provide a vision of what has led to success in another region. A detailed explanation of the service offerings and signature experiences on the Erie Canal is provided below.

The Erie Canal System in Upstate New York is comprised of 524 miles of navigable waterway, 60 communities, 55 locks, and 16 lift bridges. The canal system is best understood when broken down into regions. The Erie (green) at 363 miles long stretches from Waterford, just north of Albany to The Tonawanda's, just east of Buffalo. The modern version of the Erie which celebrated its centennial in 1915 combines the natural river sections of the Mohawk and Seneca Rivers, crosses Oneida Lake, the largest lake completely within the State of New York, as well as manmade sections that complete the canal system. The scenery encountered along the canal is diverse, from dairy farms and apple orchards, through bedroom communities of cities like Syracuse and Rochester, to long stretches of natural beauty. West of Rochester, a 4-mile stretch of the canal is cut through rock, with rock walls on both sides virtually built by hand in the early 1800s. The western terminus of the canal offers easy access to Niagara Falls and City of Buffalo, where boaters can visit the only inland Naval Museum in the United States.



The Oswego Canal (red) heads north from the Erie Canal toward Lake Ontario, a 23-mile stretch. The Village of Phoenix is found along this route, where a local youth group called the Bridge House Brats spends their summers helping boaters with everything from catching lines to running for provisions. Oswego, at the mouth of Lake Ontario, hosts the largest celebrations of the summer with its Harbor Fest.

Farther to the West, the Cayuga/Seneca Canal (yellow) heads south. Cayuga Lake, the City of Ithaca, and the historic town of Seneca Falls - the birthplace of the women's suffrage movement - are along this route. Seneca Falls is one of the best stops along the canal for boaters, with over 900' of dockage on both the north and south sides of the canal. Here, boaters can enjoy free docking, electricity, water, wi-fi, and a boater's amenity center that offers laundry, showers, and a lounge. The Cayuga/Seneca Canal continues west past the village of Waterloo, the birthplace of the Memorial Day celebration, then empties into the north end of Seneca Lake at the City of Geneva.

The Champlain Canal (blue) travels north from the Village of Waterford, where the Hudson River follows some of the same waterways that were critical during the Revolutionary War including historical sites located along

the 60-mile stretch. The Champlain Canal offers the scenery of the Adirondack Mountains to the west and the Green Mountains of Vermont to the east.

Tourism Activities on the Erie Canal System

Boating on the Canal	Hiking/Biking on the Canal	Canal Road Trips
<ul style="list-style-type: none"> • Boat ownership • Boat charters <ul style="list-style-type: none"> • Cruiser charter • European style canal boat charter • House boat charter • Paddle rentals <ul style="list-style-type: none"> • Kayak • Canoe • Stand up paddle board 	<ul style="list-style-type: none"> • Cycling shuttle service • Cycling packages <ul style="list-style-type: none"> • Full shuttle service • Inn-to-inn cycle and stay packages • Bike and camp packages • Day tours • Single-day event packages • Custom packages • Group shuttles and tours • Hiking/biking directory 	<ul style="list-style-type: none"> • Tour of Cayuga County • Brewery Tour of Central New York • History of the Revolutionary War Tour • History of the Canal System Tour • Tour of Wayne County

Boating on the Canal

Boaters have multiple options to experience the canal. Boaters residing along the canal often use their own boats to visit other parts of the region, where their home port will determine where they enter the canal. A number of visitors trailer a boat to the more than 150 boat ramps, 100 marinas, and public docks on the canal system. Boaters without sleeping accommodations and paddlers stay at the many bed and breakfasts, hotels, and campgrounds along the canal. Visitors also have the option of dry camping for free at any of the 57 locks along the canal system.

Another way visitors enjoy the canal system by water is by chartering a boat. Several companies exist along the canal that rent boats for as little as three days. Options vary from a 22' cruiser for a couple, 32'-42' European-style canal boats, to a 60' house boat that can accommodate up to 14 travellers.

Paddlers can access any of the access points along the canal. Visitors are also able to rent paddle vessels at a kayak shop along the route near Albany. There are no permits or fees required for locking through with a paddle vessel (kayak, canoe, or stand up paddle board)

The navigation system begins in early-May and ends in mid-November every year. Boaters comes from all regions of the United States and around the world. For instance, mile marker 220 in Lyons, New York hosted 331 boats from 216 communities in 40 states in 2015, as well as boaters from Canada, Holland, Australia, England, Germany, Sweden, New Zealand, Ireland, Mexico, and South America.

Hiking/Biking on the Canal

The ability to bike and hike the canal is growing in popularity and quality. Each year, the New York State Canal Corporation and the state government continue to improve the quality of the trail, as well as continuing to fill and lengthen the trail along the way. The improvements have resulted in biking becoming the fastest growing activity on the canal.

A shuttle service is available for cycle tourists visiting the Erie Canal Corridor, with tour packages starting at \$125. Options include full shuttle service, inn-to-inn cycle and stay packages, bike and camp packages, day-tours, single-day event packages, custom packages, and group shuttles and tours. The diverse packages create options for cyclists of all abilities, as well as creating a central repository of cyclist tourism information in the form of detailed maps and merchant listings to connect visitors with accommodations, restaurants, attractions, and events.

A hiking and biking directory is currently being developed for the Erie Canal System website. This will include beneficial information, such as where to locate bike shops and where to stay. There will be numerous articles throughout the site on the hiking and bicycling experience in different areas of the canal corridor. Trip planning tips will be included, as well as the ability of travellers to leave reviews.

Canal Road Trips

The Erie Canal System offers five signature road trip experiences for tourists traveling by car. A number of these tours offer a chauffeured vehicle, particularly those involving alcohol tastings. The two-day tour of Cayuga County takes advantage of the region's wine and culinary offerings. The tour includes: the Mackenzie-Childs hand-crafted ceramics and home furnishings farmhouse; a selection of wines and gourmet foods from the Finger Lakes region at the Bet the Farm Winery & Gourmet Market; Broadway musical theatre at the Merry-Go-Round Playhouse; visits to five local wineries; and lakeside meals at restaurants with farm fare and regional produce.

A three-day brewery tour of Central New York is also available for tourists interested in road trips. The varied and comprehensive experiences of this offering include: a historical, architectural, and food tour of downtown Syracuse; a glacial plunge basin lake at Clark Reservation State Park; a comedy show at The Funny Bone; hiking with llamas; bike riding along the Old Erie Canalway; hiking at a local arboretum; meals at eco-friendly farm-to-table restaurants; and visits to various breweries, hops farms, and pubs with diverse beers, ciders, and vodka.

Two tours focus on the historic tourism assets in the region. The first focuses on the history of the Revolutionary War, primarily along the Champlain Canal. The one-day tour includes: experiencing the camp life of soldiers at the Saratoga Battlefield; a historic home that was once a Revolutionary War field hospital; a historic boat cruise; and guided archeological techniques to view recently discovered artifacts; and a farm-to-table lunch. A second tour focuses on the history of the canal system through visits to museums in the region. These include: Palmyra Historical Museum; the Erie Canal Museum; and the Chittenango Landing Canal Boat Museum.

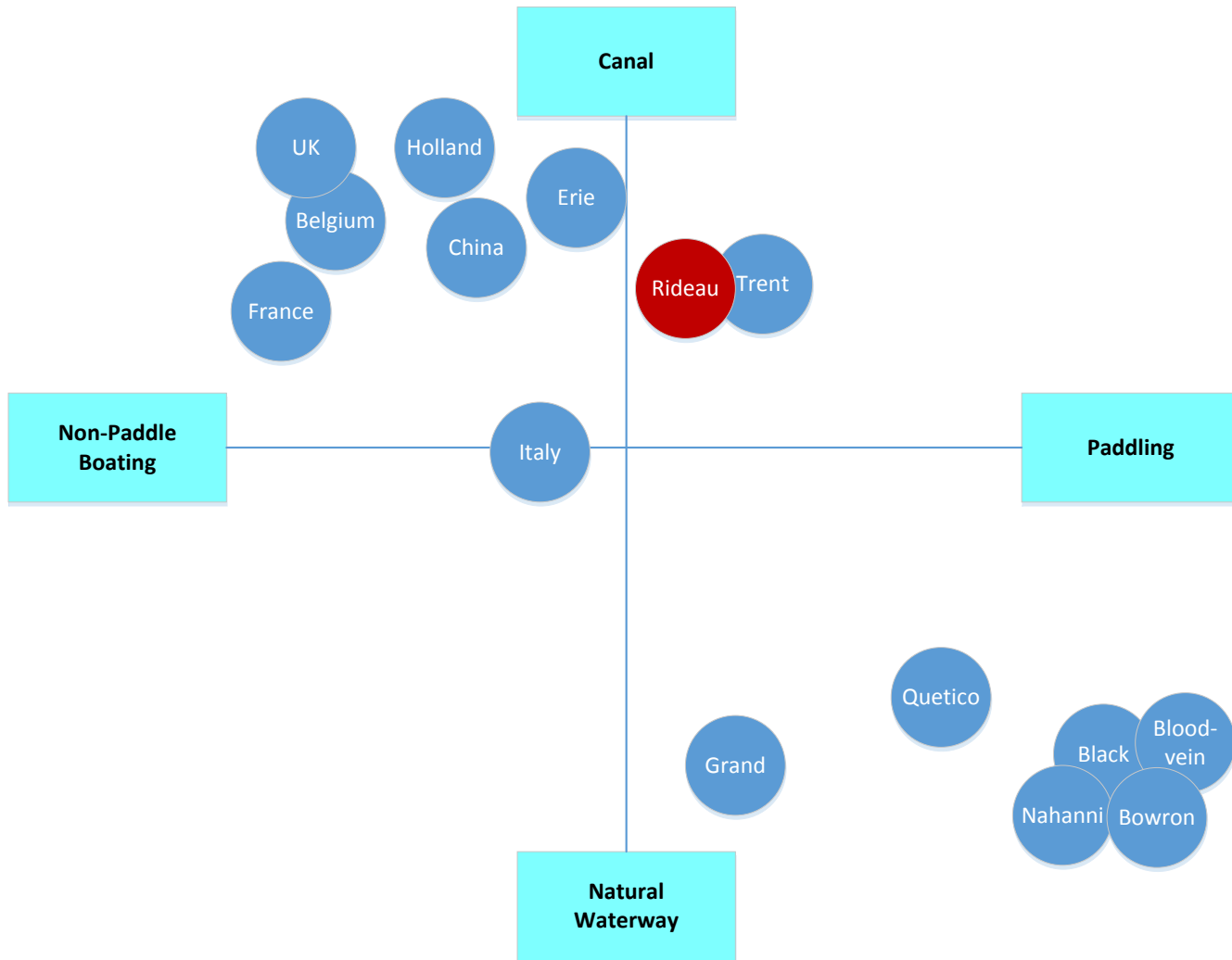
A final tour focuses on the tourist attractions located in Wayne County, primarily in Palmyra, Macedon, Clyde, and Savannah. The activities on this tour include: the largest collection of handwoven coverlets in America at the Ailing Coverlet Museum; an old passenger and commercial depot at the Erie Canal Depot; the William Phelps General Store Museum; the Wayne County Old Jail Museum; the Hoffman Clock Museum; the historic site of the publication of the Book of Mormon; a hike on a wetland nature trail; a visit to the Montezuma Audubon Center; a mural trail along the Erie Canal; as well as meals and accommodation.

7) Competitive Analysis

Determining the feasibility of fostering a world-class paddling destination on the Rideau Canal involves an analysis of competition in two markets: canal tourism and paddling destinations. The canal tourism market is dominated by six UNESCO world heritage sites. Apart from the Rideau Canal, these world heritage site canals are: the Grand Canal (China), Canal du Centre (Belgium), Canal du Midi (France), the Canal Ring Area of Amsterdam (Netherlands), and Pontcysyllte Aqueduct and Canal (United Kingdom). The Grand Canal (Italy) is included in the competitive analysis due to its world-renowned reputation for canal tourism. The Trent-Severn Waterway (Canada) and Erie Canal System (USA) are also included in the competitive analysis due to its geographic proximity to the Rideau Canal, making them a direct competitor.

The paddling destinations analyzed include the top seven canoeing destinations in Canada according to Canadian Living. Apart from the Rideau Canal, these paddling destinations are: Grand River (Ontario), Bowron River Circuit (British Columbia), Black River (Quebec), Bloodvein River (Manitoba), Quetico Provincial Park (Quebec), and South Nahanni River (Northwest Territories).

Product Differentiation Map for the Rideau Canal



A competitive analysis of the supply of canal/paddling tourism demonstrates a significant value proposition in marketing the Rideau Canal as a paddling destination. While many canals focus on marketing their waterways for tourism development, only one of the Rideau Canal's competitors in the canal tourism market - the Trent-Severn Waterway - has placed an explicit focus on development a world-class paddling destination. Of course, Italy's Grand Canal in Venice also involves a number of gondoliers, but the canal is not marketed as a paddling destination in itself. The remaining competitor canals in the tourism market tend to focus on guided boat tours, chartering, or privately owned boats. The paddling destinations analyzed tend to form a different group of competitors in the market. These destinations all place emphasis on paddling, but do not offer a canal experience. All of these competitors are based on natural waterways: Quetico is a natural lake and the remaining paddling destinations are natural white water rivers.

Product Comparison Chart

		UNESCO	Canal	Paddling	Heritage	Nature	Charters	Water Tours	Agri-Tourism	Trails	Road Trips
Canal Market	Rideau	✓	✓	✓	✓	✓	✓	✓	✓	✓	--
	China	✓	✓	--	✓	--	✓	✓	--	--	--
	Belgium	✓	✓	--	✓	--	✓	✓	--	--	--
	France	✓	✓	--	✓	✓	✓	✓	✓	✓	--
	Netherlands	✓	✓	--	✓	--	✓	✓	--	--	--
	UK	✓	✓	--	✓	--	✓	✓	--	--	--
	Italy	--	✓	--	✓	--	✓	✓	--	--	--
	Trent	--	✓	✓	✓	✓	✓	✓	--	✓	--
	Erie	--	✓	--	✓	✓	✓	✓	✓	✓	✓
Paddling Market	Grand River	--	--	✓	--	✓	--	--	--	✓	--
	Bowron River Circuit	--	--	✓	--	✓	--	--	--	✓	--
	Black River	--	--	✓	--	✓	--	--	--	✓	--
	Bloodvein River	--	--	✓	--	✓	--	--	--	✓	--
	Quetico Park	--	--	✓	--	✓	--	--	--	✓	--
	South Nahanni	--	--	✓	--	✓	--	--	--	✓	--

A comparison of the products/services of competitors demonstrates that the proposed venture is competitive in the extensiveness of its offerings. The Rideau Heritage Route would be the only canal/paddling tourism destination in North America with the UNESCO world heritage designation. The canal location creates a competitive context where the Rideau Heritage Route can be a paddling destination with unique offerings, such as a heritage reputation, charters, water tours, and agri-tourism. The closest competitors are the Trent-Severn Waterway and Erie Canal System. The Trent-Severn Waterway does not enjoy the UNESCO designation and does not focus on agri-tourism. The Erie Canal System is not a UNESCO world heritage site and is not located in Canada. The Rideau Heritage Route, therefore, shows significant potential in positioning the canal as a UNESCO designated, agri-tourism paddling destination in the Eastern Ontario market.

World-Class Paddling Demand

An assessment of visitor demand for a world-class paddling destination is also necessary to determine whether it is worthwhile for the Rideau Heritage Route to take this position in the market. A list of world-class paddling destinations has been compiled from top ten lists by National Geographic and Canoe & Kayak Magazine to determine comparability to the Rideau Canal. These destinations are:

Destination	Source
Glacier Bay, Alaska	National Geographic / Canoe & Kayak Magazine
Colorado River, Southwestern USA	National Geographic
Zambezi River / Okavango Delta, Southeastern Africa	National Geographic / Canoe & Kayak Magazine
Fiji Islands, Fiji	National Geographic / Canoe & Kayak Magazine
Dalmatian Coast, Croatia	National Geographic
Galapagos Archipelago, Ecuador	National Geographic
Northern Boundary Waters, Minnesota	National Geographic
Futaleufu River, Chile	National Geographic
Phang Nga Bay / Phuket, Thailand	National Geographic / Canoe & Kayak Magazine
Waikiki Beach and Napali Coast, Hawaii	National Geographic / Canoe & Kayak Magazine
Baja California, Mexico	Canoe & Kayak Magazine
Manuel Antonio National Park, Costa Rica	Canoe & Kayak Magazine
Johnstone Strait, British Columbia	Canoe & Kayak Magazine
Acadia National Park, Maine	Canoe & Kayak Magazine
Abel Tasman National Park, New Zealand	Canoe & Kayak Magazine

All these world-class paddling destinations are located on natural bodies of water. While the Rideau Canal was ranked the top destination in Canada for canoeing, it is evident from various world rankings that sea and white water kayaking are the preferred methods of tourists seeking paddling experiences. In fact, the Rideau Canal is not considered the top kayaking destination in the region, as the Ottawa River has been ranked as one of the top five white water kayaking locations in the world. When it comes to tourism demand, it is unlikely that the Rideau Canal will be considered a world-class destination for paddlers on par with the other destinations that appear in world rankings. It is more likely that the Rideau Canal will be considered a world-class canal that offers paddling activities for tourists.

However, further segmentation can provide a niche market for paddling tourism on the Rideau Canal. Due to the relative safety of the canal and the low degree of paddling difficulty, there is significant potential in marketing the canal as a world-class destination for family paddling or amateur paddlers. Pursuing the leisure

paddling market over the adventure paddling market may provide the Rideau Canal with significant competitive advantages over other world-class paddling destinations.

8) Target Market¹⁰⁶

To this end, the Partnership Group and discussion participants used the Canadian Tourism Commission's "Explorer Quotient" (EQ) in planning to facilitate opportunities for guest explorers. The premise of EQ is that the social values and lifestyles of travellers play the most significant role in influencing the desires and experiences pursued in travel. Travellers adapt their travel to enable them to benefit from experience opportunities in ways that are meaningful to them.

The use of the CTC's Explorer Quotient profile data respecting the nine types of travellers has the impact of "personalizing" the visitor experience opportunity development process. It moves the identification of potential new or enhanced opportunities from "mass" thinking based upon traditional demographic information and empirical knowledge of guest services towards a mind-set of responding to the social values and travel traits of 'individuals'.

The following provides a perspective relating how the CTC's nine explorer types might wish to connect with and appreciate the natural and cultural heritage resources and enjoy leisure recreational opportunities of the Corridor.

Learners - Authentic Experiencers (AE) and Cultural Explorers (CE)

Authentic Experiencers and Cultural Explorers are lifelong learners, who seek to wander natural and cultural landscapes respectively in pursuit of experiences which contribute to their personal growth and sense of accomplishment. They link their natural and cultural experiences in gaining insight and understanding of their destinations, demonstrating concern for sustaining the ecological and cultural integrity of the places and people they encounter.

They prefer self-guided and independent exploration opportunities to connect with the authentic and the best examples of their destination's nature or culture - sensory rich opportunities through which these travellers gain understanding and insight into the people and places they visit.

They travel with purpose and intent to strategically selected destinations and welcome immersion in the natural and cultural environments they encounter. They research their travels in order to be prepared and self-reliant, yet welcome the expertise and added insights provided by hosts.

¹⁰⁶ The information presented in this section is derived from: Kim Whytock & Associates. Visitor Experience Opportunities Concept for the Rideau Canal Heritage Corridor. December 2013.

“Authenticity Experiencers” seek connection with the essence of the Rideau Corridor’s aquatic and terrestrial environments and the culture of the waterway communities they visit, in ways which focus on authentic situations and resources. Personally connecting with the real thing - natural habitats, heritage resources, and cultural displays are essential to stimulate their meaningful experiences and learning.

They seek: understanding and appreciation of Canal’s nature, history and communities, opportunities to observe the people and places they encounter, and opportunities for personal development through full immersion in their travel destinations and experience opportunities.

“Cultural Explorers” seek opportunities to embrace, discover, and immerse themselves in the entire experience of the Rideau Corridor’s culture, people and settings they visit - personal connection. They desire to become one with the community, if only for a moment. They seek to encounter the sights, smells, sounds, tastes and textures that epitomize the locks, waterway and its people.

They seek: to participate in the modern-day culture and visit historic sites, to converse with locals, attend local cultural festivals, or to go off the beaten track to discover how people truly live.

Hosting Authentic Experiencers and Cultural Explorers requires:

- Offering unusual learning opportunities, access to: places, resources and expertise
- Being flexible in facilitating “their connection with nature, culture and communities”
- Time and places from which to observe and sense the cultural differences
- Challenging their intellects to broaden their past experiences
- Involving not showing them - giving them responsibility and at times the lead
- Means to connect and become one with their hosts

Socializers - Free Spirits (FS) and No Hassle Travellers (NHT)

These travellers, whose primary goal in travel is to enjoy time with other people - family and friends or people of similar interests - seek a social milieu to “enjoyably appreciate” the places and people they encounter in their travels.

The first is deemed “Free Spirit” as their focus is upon fun and enjoyment. They are attracted to places which promise a difference - places where they can meet people and be stimulated by others and the environment and activities of the destination.

Free Spirits desire to be constant travellers seeking exotic and unusual destinations and exploration opportunities - they often return needing a rest, particularly when their experiences are of physically challenging.

These leisure travellers will be drawn to the Rideau’s iconic experiences and attractions - its most impressive locks, cruising the big lakes, its artisans and distinctive dining. Fun events on land and water, particularly with

music and celebration will be meccas. So too will be individual challenges and recognitions, like “skate the lake” competitions and multi-modal trekking challenges.

No Hassle Travellers are more often simply seeking a change from their norm, an escape vacation providing time for relaxation, release from stress and opportunity to recharge with family and friends. They value organized and scheduled experience opportunities designed for small groups and families.

Perhaps less driven than “Learners” to connect with their destination, they still seek a sense of accomplishment with their travel partners - a sense of group achievement and shared memories and meaning. They choose well known and regarded travel destinations and experience opportunities. They do not arrive well-briefed and thus welcome information and orientation.

“No Hassle Travellers”, focus much of their travel based around family events and simplicity - activities which do not raise their stress levels. Enjoyment and discovery are key goals. They seek opportunities to share meaningful experiences with their families, perhaps in a park or community setting, which serves as a foundation or backdrop for their activities. Children’s programs and relaxed activities to explore and discover are welcomed.

Yet, these same explorers seek to discover and rediscover the beauty and serenity found along waterside and inland trails, and the special vistas and communities of the Rideau Canal Heritage Corridor. They are “on vacation”, escaping to the out of doors and community hospitality and special events.

Hosting No Hassle Travellers and Free Spirits requires:

- helping them have fun in exploring this place
- opening doors and minds to possibilities
- guiding and supporting their group discovery
- facilitating special entrée and unique individual opportunities
- being supportive and guiding in their chosen endeavors
- connecting them both socially and culturally with others

Relaxed Travellers - Gentle Explorers (GE) and Rejuvenators (R)

Creatures of habit, “Gentle Explorers” return time and again to preferred destinations or to similar types of travel destinations and opportunities that they enjoy. They return to discover perhaps something they had not observed or experienced earlier; or to encounter more of that with which they are familiar.

Perhaps these types of travellers are guests of resorts, such as the Hotel Kenny or a key component of the Kawartha Voyageurs guests, and other facilitated touring services. Natural settings and cultural heritage places in close proximity to their homes are an attraction, as might be seasonally recurring celebrations.

Often bringing “home” along with them in the form of motor homes, these explorers are content to observe others enjoying the Canal and to also quietly appreciate the everyday life of adjacent communities. They may

be a significant component of the boat touring guests from surrounding areas, such as Montreal and New York State. They may also be a key component of the seasonal camping operators.

“Rejuvenators” travel to places which allow them to recharge - they do not come back needing a rest. They seek comfort and caring in relatively passive experiences which connect them most often with the culture of their destination and perhaps opportunities to observe nature. Strategic places from which to observe without getting involved will be appreciated.

The quiet, sensory rich backwaters of flooded valleys, the morning mists and evening sun sets at Hotel Kenny, the solitude of floating the Tay Canal, or exploring the Swale and other serene wetland environments - or simply a secluded Rideau chair, like Taft, to watch the waters and world flow by - these are the recharging opportunities which compel Rejuvenators.

Hosting Gentle Explorers and Rejuvenators requires:

- Welcoming them back
- Gently leading them astray
- Providing comfortable vantage
- Reading minds & answering their questions

Specific Questers - Buffs (CHB), Personal History (PHT), Virtual Travellers (VT)

It is difficult to identify, in advance, the resources, themes, and experience opportunities which will best respond to the values and traits of “Buffs” and Personal History Travellers”.

Experience to date suggests to us, that the CTC’s “Cultural History Buffs” may include many more types of experience seekers, for example, birders, rock hounds, plant and faunal enthusiasts, food, wine, art, etc. In each case, these explorers are specialists - equipped with a solid information base and personal perspectives on the subjects of their exploration.

Perhaps the Rideau Canal is a mecca for historic canal buffs, Rideau historic boat buffs, bass fishing buffs, military and Eastern Ontario history buffs.

“Personal History Travellers” likewise, are drawn to a place or event because of its personal meaning to them - a piece of their heritage - something they wish to share with other family members or simply rekindle their connection.

These travellers are very purposefully driven by their own special interests. The best a host can do is to customize experience and connection opportunities for these individuals on an “as needed basis”.

“Virtual Travellers” seek in depth connections with destinations of interest - exploring virtually through books, video and increasingly internet facilitated “virtual travel” programs. Connections with expertise, resources and events - albeit indirectly - are the priority desires of these types of travellers. Once in a while they arrive at

places of interest in the accompaniment of family and friends. In these cases, information, orientation, presentation and library services are highly valued.

Hosting Buffs and Personal History Travellers requires:

- Providing connection to “expertise” and privileged access to historic resources and special places
- Opportunities to share what they know with others
- Involvement in community celebrations as many are returning to their roots or childhood experiences

Target Market Priorities

The participants were asked to speculate in EQ type terms, who were their current guests and who in the foreseeable future were their desired guests. This was intended to provide a part of the foundation for moving forward.

Current Visitors

Overall they speculated that Gentle Explorers and No Hassle Travellers make up the bulk of guests in the Corridor travelling by both land and water. Authentic Experiencers and Cultural Explorers are the next most prevalent groups.

It was speculated, for example, that those most often visiting the following areas or types of attractions may be:

- Canal locks - Gentle Explores, No Hassle Travellers, Cultural Heritage Buffs, Cultural Explorers
- Hotel Kenny and other heritage inns - Gentle Explorers, Rejuvenators, Cultural Explorers
- Marinas - Rejuvenators, Gentle Explorers and Authentic Experiencers and Free Spirits
- Westport and other recreational villages - No Hassle Travellers, Free Spirits, Gentle Explorers
- Merrickville and the Locks - No Hassle Travellers, Gentle Explorers and Cultural Explorers.
- Manotick and Kemptville - Buffs, Cultural Explorers and No Hassle Travellers
- Long Island locks and park lands - No Hassle Travellers, Gentle Explorers and Rejuvenators
- Voyageur canoeing - Authentic Experiencers, Cultural Explorers, Free Spirits
- Ottawa Locks - all explorer types, but primarily seeking passive observation opportunities

It might be speculated that a majority of current guests are regionally high repeat guests, who may, owing to their familiarity with specific Reaches and perhaps being nearby residents act as they are Gentle Explorers and Rejuvenators.

In sum, the current guests may be best hosted by responding to the values and traits of Gentle Explorers, No Hassle Travellers, Authentic Experiencers and Cultural Explorers.

Future Visitors

The participants believe that the Corridor and each individual Reach have a rich array of natural and cultural heritage experience opportunities which is capable of attracting guests from afar and new guests from within Eastern Ontario. They also believe that the waters and landscape are capable of affording safe and accessible escapes for local urban dwellers and regional boaters.

With this in mind, the participants indicated an interest in growing the number of guests from both near and far, who are Authentic Experiencers (nature experience biased), Cultural Explorers (culture experience biased); and for those escaping to outdoor activities and serenity, No Hassle Travellers, Gentle Explorers and Free Spirits.

Bringing the communities to life through animation, festivals and events will meet the needs of Gentle Explorers and No Hassle Travellers. Enhancing the vibrancy of communities and in particular their waterfronts, will respond to the interests of all priority explorer types, with Gentle Explorers and Rejuvenators being very appreciative of enhancements.

The focus of enhancements and innovations relating to exploring and discovering the Canal's and waterway's cultural and natural heritage resources are prominently a response to Authentic Experiencer, Cultural Explorer, No Hassle Traveller and Free Spirit values and interests.

9) Market Feasibility

Developing a world-class paddling destination along the Rideau Heritage Route has much potential for the growth of the region's tourism industry and economic growth more broadly. Emphasizing paddling on the Rideau Canal leverages a number of the strengths of the Rideau Heritage Route and would be a relatively unique tourism experience on a world-class canal.

Focusing on land-based opportunities may also enhance the market potential of the region with a number of valuable tourism assets in addition to the Rideau Canal. These land-based tourism opportunities may help to increase the appeal of the Rideau Heritage Route to certain target market demographics that are not seeking adventure or outdoor tourism. Therefore, the most feasible strategy is to target a broad market of different groups of tourists seeking different experiences by promoting the many different tourist attractions in the region as a unified experience or brand. Paddling on the canal would be an important aspect of a multi-faceted approach that builds a broader tourism market around core experiences. In this way, the canal would act as a tourism hub for the region, with other land-based opportunities strategically built as spokes to connect the broader economy.

SECTION 4: ORGANIZATIONAL ASSESSMENT

Summary of Organizational Assessment Section

Findings:

- *The current governance structure of the Rideau Heritage Route is complex.*

Risks:

- *The Rideau Heritage Route may not achieve its potential in the tourism industry if the governance structure is not remedied*

Assumptions:

- *RHRTA is the best positioned organization to provide leadership on tourism opportunities in the region going forward*

Gaps:

- *The willingness and ability of other stakeholders to accept the RHRTA as a coordinating body is unknown*

10) Rideau Canal Organizations

The Rideau Canal has a multitude of agencies and organizations that have various roles which at times overlap. This section of the study will outline each organizational stakeholder and their role.

Rideau Heritage Route Tourism Association

The Rideau Heritage Route Tourism Association (RHRTA) actively contributes to creating a climate that stimulates tourism investment, tourism development, marketing, and other activities along the Rideau Corridor. The association supports activities in tourism product development and the promotion of the Rideau Corridor that increase business revenues through visitor expenditures.

The 11 municipal members of the Rideau Heritage Tourism Route Association in 2016 were: United Counties of Leeds and Grenville, Lanark County, Town of Smiths Falls, Township of Rideau Lakes, Township of South Frontenac, Municipality of North Grenville, Village of Westport, Township of Leeds and the 1000 Islands, Village of Merrickville-Wolford, Township of Drummond/North Elmsley, and Township of Tay Valley.

Parks Canada

Parks Canada maintains stewardship of the Rideau Canal. On behalf of the people of Canada, Parks Canada protects and presents nationally significant examples of Canada's natural and cultural heritage and fosters public understanding, appreciation and enjoyment in ways that ensure their ecological and commemorative integrity for present and future generations. The national historic sites component of Parks Canada is responsible for Canada's program of historical commemoration, which recognizes nationally significant places, persons and events. The Rideau Canal's heritage lock stations still operate as they did at the time of completion in 1832 and the canal remains a fully operational navigable waterway.

Regional Tourism Organizations - 9, 10, 11¹⁰⁷

In 2009 the Ministry of Tourism Culture and Sport completed Discovering Ontario Report that identified waterways as one of greatest their assets. Through this report it was identified the need to create Regional Tourism Organizations as destination marketing and management need to come together as an industry. Regional boundaries were developed from consultations and submissions from industry partners. It was recognized the regions need to be sustainable, capture unique product clusters and integrate existing brands and partnership.

The Rideau Canal corridor was broken into three RTOs. The funding for these areas come from the Ministry with a base amount, proportional funding to the region's tourism performance and partnership funding. The RTOs are independent, not for profit organizations governed by a Board of Directors. The board is responsible for developing annual business plans and determine the use of the funds. The ministry reviews plans and funding is provided in accordance with a transfer payment agreement.

RTO9 - The Great Waterway (South Eastern Ontario)

2016-17 Funding Allocation - \$1,724,207

RTO10 - Ottawa Tourism (Ottawa and Countryside)

2016-17 Funding Allocation - \$3,382.780

RTO11 - Ontario Highlands (Haliburton Highland to the Ottawa Valley)

2016-17 Funding Allocation - \$950,500

¹⁰⁷ http://www.mtc.gov.on.ca/en/regions/regions_q_a.shtml

Community Futures Development Corporations

As part of the Community Futures Ontario East Network, there are 4 CFDCs (Valley Heartland, 1000 Islands, Grenville, and Frontenac) of the 15 organizations in rural Eastern Ontario that connect to the Rideau Canal. The Eastern Ontario network receives support from the Federal Economic Development Agency for Southern Ontario, FedDev Ontario, through its regional office in Peterborough. Individually and collaboratively they strengthen regional economies by supporting innovation, business growth and community capacity.

Friends of the Rideau

Friends of the Rideau is one of the many non-profit organizations across Canada that work closely with Parks Canada to provide Canadians and international visitors the opportunity to learn about and support our natural and cultural heritage. Its goal is to enhance and conserve the irreplaceable charm of the Rideau Corridor, to increase public awareness and enjoyment of the Rideau and to develop strong public support for the long term well-being of the Rideau Canal Waterway.

Rideau Corridor Landscape Strategy Group

Following the recommendation of the World Heritage Committee, Parks Canada committed to undertaking an assessment of the visual character of the Canal Corridor. This commitment resulted in the formation of the Rideau Corridor Landscape Strategy Group; a collective of representatives from First Nations, federal and provincial agencies, municipalities, NGOs, property owners and others working together to ensure a collective vision for the Rideau Corridor.

Rideau Roundtable

The Rideau Roundtable is an incorporated not-for-profit association of individuals, community organizations and government agencies working together to keep the Rideau and Cataraqui Watersheds from Ottawa to Kingston healthy - socially, economically and environmentally.

Local Chambers of Commerce

Local Chambers of Commerce have played a role in the development of tourism on the Rideau Canal though economic development, trade, and commerce in the region. These groups of small businesses contribute to the vitality of the Rideau communities.

Lake and Cottage Associations

There are many lake and cottage associations along the Rideau. These groups deal with various issues such as lake/river water quality, lake planning, septic inspections, municipal taxes and road maintenance.

11) Organizational Assessment

While all of these organizations have their mandates connected to the Rideau Canal in some form, it was noted throughout the consultations there are several that overlap in their roles and responsibilities while their focus is broader in scope than just the Rideau Canal.

In order for the Rideau Canal to ultimately bring the value of its UNESCO designation to its world-class recognition, strong leadership and bold decision making are necessary by all parties. Canada, the province of Ontario and the Rideau communities have an opportunity to bring new investment, create signature experiences and maximize market share growth.

The foreign investment of Le Boat has created excitement along the corridor and exemplified a partnership model for future growth along the Rideau Canal corridor. For the first time all four levels of government (federal, provincial, regional, municipal) and multiple agencies and municipalities worked together to present the Rideau Canal as a Canadian destination of choice.

The Town of Smiths Falls, the United Counties of Leeds and Grenville and Lanark County represented its municipalities as they collaborated with Parks Canada, Community Futures Development Corporations Network and the Ontario Ministry of Tourism, Culture and Sport during the site selection process. Upon Le Boat's decision to move forward with the Rideau Canal, additional support was required from the three Regional Tourism Organizations - RTO 9, 10, 11. All together there were common goals to bring a globally recognized product to the Rideau Canal, increase the canal's international exposure and bring new visitors to the corridor and extend their length of stay to increase visitor spending.

The result of this collaborative effort has brought forward a future direction and model for Rideau Heritage Route Tourism Association.

The communities of Smith Falls, the United Counties of Leeds and Grenville, Lanark County, and South Frontenac Township form the Heart of the Rideau Canal. The rural Heart of the Rideau Canal has commonalities in the development of its infrastructure to support tourism growth and expansion to increase product offerings. Together these communities will need to work together.

The Heart of the Rideau communities should lead and transform the Rideau Heritage Route Tourism Association with support from the Ontario Ministry of Tourism Culture and Sport. The Rideau Canal is their primary tourism asset which results in a clear focus unlike other tourism organizations along the Rideau corridor.

Governance Model / Transition of the Rideau Heritage Route Tourism Association (RHRTA)

The RHRTA should move to a streamlined Board with a multi-level partnership model. The Heart of the Rideau Canal Communities continue to fund RHRTA based on the tourism GDP value as outline in the chart below:

Community	Tourism GDP	Tourism GDP ratio
Township of South Frontenac	\$18.9M	4.1%
Lanark County	\$186M	40.0%
Town of Smiths Falls	\$76.9M	16.5%
United Counties of Leeds and Grenville	\$183M	39.4%
Total GDP	\$464.8M	100.0%

Based on the Economic Impact Assessment a representative from the top three tourism sector industries - Accommodation, Food and Beverage, and Amusements and Recreation/Heritage/Artist/Writers/Performers - would be elected to the RHRTA Board.

With the support and direction from the Ministry of Tourism, Culture and Sport a recognized Partnership model be developed between the RHRTA Board and the Regional Tourism Organizations - 9, 10, 11. Together these entities would be joined by advisory members from the Ontario Ministry of Tourism, Culture and Sport, Parks Canada and the Community Futures Ontario East Network.

The Rideau Canal Partnership would focus on the overall development of the Canal from an investor and visitor perspective. RHRTA Board funds would be leveraged in partnership opportunities that would be agreed upon.

Rideau Canal Tourism Partnership Members:

- Town of Smiths Falls
- United Counties of Leeds and Grenville
- Lanark County
- Township of South Frontenac
- Private Sector - Accommodation
- Private Sector - Food and Beverage
- Private Sector - Amusements and Recreation, Heritage, Artist/Writers/Performers
- RTO 9 - the Great Waterway
- RTO 10 - Ottawa Tourism
- RTO 11 - Ontario Highlands
- Community Futures Ontario East Network

Advisory:

- Ontario Ministry of Tourism, Culture and Sport
- Parks Canada

This partnership will need to bring leadership and provide clarity on roles and responsibilities, as well as provide a central body to manage and execute a strategic action plan.

The Ontario Ministry of Tourism, Culture and Sport has recognized the importance of Tourism Investment and have implemented its Investment Strategy and Implementation Plan that has seen positive results with the foreign direct investment of Le Boat. To ensure this investment continues to grow, the Ministry needs to consider a framework that will support and nurture this and future investments along the Rideau Canal. With the Ministry's encouragement and openness to adaptability, this partnership will support the inter-collaboration of RTOs 9, 10 and 11 in a new format.

SECTION 5: CONCLUSION

The conclusions in the report are based on an extensive review of the economic impact of tourism on the Rideau Canal, the product feasibility study of a world-class paddling destination, and the organizational assessment. The economic impact assessment demonstrates that the region enjoys a significant tourism resource in the Rideau Canal. The product feasibility study demonstrates that the full market potential of the Rideau Canal as a tourism resource may be untapped in the region, particularly in terms of paddling. To tap into this potential, the organizational assessment demonstrates that the governance model will be a key factor for success. Overall, the report demonstrates that there is a significant opportunity for the economic development of the region by enhancing tourism on the Rideau Canal.

The main conclusions of the studies are:

- Tourism plays a very important role in the region's economy. The communities along the Rideau Heritage Route have many competitive advantages in tourism and see many spillover effects from the tourism industry to other sectors. However, the importance of tourism differs from one community to the next.
- The Rideau Heritage Route offers much potential in terms of developing a world-class paddling destination. The UNESCO world heritage designation combined with an ideal setting for canoeing is a unique tourism offering that is not offered by any other sites with the same designation. The historical narratives associated with the canal also provide opportunities for signature tourism experiences.
- Though the Rideau Heritage Route is an altogether unique tourism experience on a UNESCO world heritage site, there are many other paddling destinations that are considered world-class. The vast majority of these destinations are located in natural settings and most often involve white water kayaking. The Rideau Heritage Route might be more suitable for leisure paddlers or families than paddlers seeking a higher degree of difficulty.
- The Rideau Heritage Route also includes a number of valuable land-based assets that also offer much potential in terms of developing the region's tourism industry. Synergies between the Rideau Canal and these land-based assets should be explored to capitalize on the region's full tourism potential. Diversifying tourism investments will create opportunities to have paddlers partake in land-based tourism activities, perhaps scheduling more time in the region and spending more tourism dollars.
- Different tourist demographics are interested in different experiences. Broadening the appeal of the tourism assets in the area by combining paddling with other regional experiences can expand the Rideau Heritage Route's potential tourism market.
- Currently, the Rideau Corridor spans across three regional tourism organizations within Ontario. Not having a dedicated source for visitor information has led to visitor confusion and lack of knowledge about the many experiences the Rideau has to offer. A centralized agency, with responsibility dedicated to the Rideau as a whole, is needed. It would provide the direction, coordination and consistency required for effective marketing efforts and integrated tourism development. Such an agency could develop a comprehensive online capability for not only disseminating timely and accurate information for all localities along the Rideau, but also for facilitating online bookings at attractions, events, activities, and accommodations.

- The Rideau Heritage Route needs governance leadership to move forward with proposed tourism initiatives and achieve greater success. There are many overlapping tourism organizations in the region, which makes decision making cumbersome and inefficient.

Enhancing tourism on the Rideau Canal should be seen as a joint initiative. The governance of the initiative should recognize that the recommended path forward might need to pivot and adapt to the environment and the roadblocks it might encounter. Additionally, it should be recognized that the mix stakeholders can influence the direction recommended.

Recommendations:

- It is recommended that the Rideau Heritage Route Tourism Organization will be best served by negotiating an agreement year over year with its provincial and federal partners, (specifically Regional Tourism Organizations 9, 10 and 11, and Parks Canada), in order to formalize a promotional strategy for the Rideau Canal both as a UNESCO World Heritage site, as well as a component of existing tourism products and planned promotions. The agreement should serve all parties, acknowledge the current promotional efforts conducted by partners, and include a detailed plan of action for implementation that addresses budget implications, anticipated outcomes, performance measures and proposed timelines.
- The Rideau Heritage Route should seek dedicated funding to enhance tourism in the region from a variety of sources. RTO 9, RTO 10, and RTO 11 should be leveraged as a conduit to garner further funding for tourism investment in the region. The Rideau Heritage Route Tourism Association requires increased administrative support for tourism development and new funding should be dedicated toward this purpose. Additionally, the Ontario Ministry of Tourism, Culture and Sport and Parks Canada should be lobbied for additional funding by demonstrating the economic impact tourism has in the region.
- The Rideau Heritage Route Tourism Association should take a greater leadership role in coordinating the tourism stakeholders in the region. This will require obtaining a strong mandate and direction from the Province of Ontario. Better partnerships and liaisons with municipal stakeholders in the region will also be required. Decision making authority, roles and responsibilities of each stakeholder, and financing agreements should be formalized as part of this governance transition. A transition to a membership funding model based on the Heart of the Rideau Canal Communities and a governance model based on the Rideau Canal Partnership is highly recommended.
- The feasibility of increasing paddling tourism on the Rideau Canal will require significant financial investments in infrastructure. In particular, dock structures and mapping must be improved for the canal to achieve its potential as a paddling destination.
- The Rideau Heritage Route should explore making paddling along the Rideau Corridor a designated Canadian Signature Experience by Destination Canada. Achieving this designation will attract a core influx of tourists to the Rideau Canal for paddling experiences.
- The Rideau Heritage Route should plan for the growth of new tourism investments in the region. The development of The Opinicon and the arrival of Le Boat will create a window of opportunity to expand tourism exponentially in the region. The Rideau Heritage Route should focus infrastructure and tourism investments around producing the greatest return on investment from these two opportunities. Investment attraction efforts should also focus on the amount of recent private sector investments in the regional tourism industry.

- The Rideau Heritage Route Tourism Association should develop a strategic plan and action plan to determine what tourism initiatives would have the greatest return on investment in terms of the economic development of the region. Part of the strategic plan should be to determine how to combine water and land-based activities to create a harmonized tourism brand for the region.

APPENDIX A: PUBLIC SECTOR INVESTMENT ATTRACTION PROFILE

RIDEAU HERITAGE ROUTE

A great place to visit, a great place to invest!

The Rideau Heritage Route is more than a popular destination for natural landscapes, pristine waterways, historic villages and relaxing getaways. It is truly a unique jewel of Eastern Ontario, offering an unspoiled oasis for people living in or travelling to the nearby cities of Ottawa or Kingston. Whether it's locking through a hand-cranked lock on the canal, chatting with one of the many artisans, visiting a farm, fishing a secluded bay, feasting on locally-grown fare, or simply enjoying the scenery, Rideau visitors can immerse themselves in an authentic return to the timeless, less complicated ways in life.

This profile provides an overview of the tourism products and markets of the Rideau Heritage Route, and identifies where investment can leverage the existing tourism product to attract and retain more visitors to Eastern Ontario.

A truly special place

The Rideau Heritage Route offers a truly timeless visitor experience, whether it is travelling our heritage canal, fishing our waterways, exploring our villages, enjoying our festivals, or simply unwinding at a restful resort.

Experience the world-class Rideau Canal

As the oldest continuously-operated canal system in North America, the 202km Rideau Canal connects the St Lawrence River at Kingston with downtown Ottawa through a system of lakes, rivers and man-made waterways. Featuring many towns and villages along its route, the canal offers unique alternatives to travelling by automobile. Large and small motorboats are popular, as are canoes and kayaks. It takes between 3 and 5 days to travel by motorboat through the length of the canal, and it is common to meet boaters who are travelling the Kingston-Ottawa-Montreal "Golden Triangle". Canoeists can explore the pristine bays and inlets of the surrounding lakes, or expedition the full length of the canal. Or maybe the comfort of a sightseeing cruise on the waterway is more your style.

Originally constructed for strategic military purposes, the hand-cranked locks are operated as they were originally built, and provide a unique experience for boaters and onlookers. The canal was designated a National Historic Site of Canada in 1925, a Canadian Heritage River in 2000, and a UNESCO World Heritage Site (one of only six such canals in the world) in 2007. The canal is currently managed by Parks Canada. Four blockhouses and some of the original 16 defensible lockmasters residences are still visible.

Boaters are serviced by over 30 launch ramps, 47 locks at 24 lock stations, various campgrounds, and more than 20 marinas. In 2016, over 59,000 boats were "locked through" on the canal.

Le Boat chooses the Rideau

Recognizing the Rideau Canal's potential, Europe's largest operator of self-drive boating vacations, Le Boat has moved its North American headquarters from Florida to Smiths Falls, and will invest \$16M in establishing a world-class boating experience beginning in 2018. Guests will be arriving from Germany, Switzerland, UK, France, US, Canada, Belgium and Austria to enjoy this world-renowned canal.

"We are extremely thrilled ... we expect to see growing global demand over the next few years for this new uniquely Canadian experience."
– Cheryl Brown, Managing Director of Le Boat





The Opinicon Resort is reborn

After an extensive period of renovation, the doors of the Grand Old Dame of the Rideau opened once again in 2016. It offers cozy, historic cottages and lodge situated in an idyllic lakeside setting.

“Come and paddle in our waters, play on our grounds, dine in our restaurant, relax in our pub...or just while away the hours in one of our iconic red Muskoka chairs.”

- Fiona McKean, Owner of The Opinicon

Fish our waterways

The pristine lakes and rivers throughout the Rideau Canal Corridor are a haven for anglers. Parks Canada encourages you to “Cast your line, feel a tug and reel in a catch as a heron watches with envy. Slow down, breathe fresh air and spend time with friends and family trying your hand at landing a roll call of sport fish on the Rideau Canal’s varied waterscapes. Go for Largemouth and Smallmouth Bass, Northern Pike, Walleye, Yellow Perch, Lake Trout and the mighty Muskellunge, the biggest local game fish holding the Ontario record of 27.92 kilograms (over 61 lbs!)”

Explore our villages

The villages and towns of the Rideau invite you to stroll along their streets lined with buildings dating from the 1800’s. You will not only find something unique—you will also enjoy chatting with the shop owners and artisans. Visit a local bakery, or cheese shop, or a country market offering locally-grown produce. Explore historic sites. Watch mustard being made! You will soon see just how down-to-earth and helpful Rideau people really are.

Be entertained!

Festivals and music are everywhere! For example, the “Vintage Race Boat Regatta” dates to 1908. The “Rideau Lakes Cycle Tour” brings close to 2,000 cyclists through the area. Seeley’s Bay hosts the annual “Red CanoeFest” as well as the “Kids and Cops Fishing Derby”. Lombardy hosts a “Bluegrass Festival”. The “Festival of Small Halls” brings internationally-renowned musicians to two dozen rural gathering spaces. “MUSICwestport” and “Blues on the Rideau” attract visitors from far and wide, as does the “Kemptville Live” music festival.

Unwind in our accommodations

Unwinding for a night or a week is part of the Rideau experience. Accommodations are available for every preference. Visitors can stay in campgrounds or trailer parks, waterfront cottages, Bed and Breakfasts, historic hotels, country inns and lodges, or chain hotels in the larger towns.

Strong tourism markets in Ontario

With a population of 13.5 million and an additional 142 million people living within a day’s drive, Ontario remains the single largest travel destination in Canada. It captures 47% of the country’s tourism spending

by international visitors and generates \$28 billion in tourism revenue annually.

Eastern Ontario, including the Rideau Heritage Route, is an important contributor to Ontario’s success as a tourism destination. In addition to traditional traveller demographics, the types of authentic experiences offered along the Rideau match-up very well with the younger and growing millennials and millennial-minded traveller segments.

A 2013 study¹⁰⁸ concluded that travellers to the Rideau Heritage Route are seeking:

- “To immerse in the Rideau’s distinctive natural and cultural environments and lifestyles;
- To taste, touch, smell, hear and see the distinctive characteristics of the Rideau;

¹⁰⁸ Rideau Canal Heritage Corridor Realizing Our World-class Potential, Kim Whytock & Associates Inc., December 2013

- To explore the Rideau's landscapes and communities; and,
- To meet people whose lives and heritage are much different than theirs."

Ottawa and Kingston resident markets

Rideau benefits from nearby urban resident markets of both Ottawa and Kingston. As well, domestic and foreign Visitors to these cities provide good market potential for increasing tourism along the Rideau Heritage Route. The third primary market for the Rideau is the Water-lover Segment

The nearby residents of Ottawa and Kingston provide a large, ongoing tourism market for the Rideau Heritage Route. They make daytrips to specific villages, restaurants or attractions in the Rideau corridor. They attend special events and concerts, or may take a sightseeing cruise. As well, the local resident market may spend extended periods of time in the area at seasonal cottages (owned or rented).

The population of the Ottawa-Gatineau Census Metropolitan Area (CMA) is over 1.2 million. Ottawa's Official Plan projects a growth rate of 16% over the next 15 years (2016-31). Mature adults (aged 35-64) account for about 40% of the population while young adults and seniors account for about 20% each. Ottawa's average income is the third highest of all major Canadian cities, and over half the population have graduated from college and/or university.

With a CMA population in 2016 of over 161,000, Kingston is the second largest city in Eastern Ontario. Kingston's population is well-educated in comparison to other cities, with the most PhD-holders per capita of any city in Canada. Kingston's stable economy reflects the public sector, including healthcare, education, military and correctional services.

Ottawa and Kingston visitor markets

Both Ottawa and Kingston are significant tourism destinations in Eastern Ontario, and many visitors include the Rideau Heritage Route in their travel plans. This market has significant potential for attracting a greater proportion of domestic and foreign visitors to Ottawa and/or Kingston and the 1000 Islands.

As Canada's national capital, Ottawa attracted over 10.3 million visitors in 2016, including 4.8 million visitors spending at least one night in the capital. Total visitor expenditures approached \$1.7 billion. Most visitors were Canadian, while 555,900 were from overseas and 520,700 were from the USA. About 1,300 motorcoach groups stayed overnight in 2016. Motorcoach operators, especially those catering to European travellers, represent an opportunity for incorporating a truly Canadian waterway experience into their tour itineraries.

Historic Kingston attracts more than 2.5 million visitors annually, with tourism expenditures exceeding \$350 million. It is on Ontario's major highway, half way between Toronto and Montreal. Kingston is the "Gateway to the 1000 Islands" and visitors may already include Ottawa in their plans. For example, motorcoach tours often include both destinations in their itineraries. Kingston's tourism industry actively campaigns to attract visitor markets that align well with what the Rideau has to offer. For example, it is targeting the millennial psychographic that is interested in fishing, cycling, motorcycles, culinary and/or cultural experiences.

Water-lovers markets

The Water-lovers market is significant since visitors spend a few days or longer along the Rideau Heritage Route. The market segment is not limited to large yachts from far and wide travelling the length of the historic Rideau Canal. The waterway also provides opportunities for power boating, canoeing/kayaking, sightseeing cruises, and excellent sport fishing. As well, the Rideau waterways offer the quintessentially Canadian experience of lakeside cottaging, including sunbathing, swimming and watersports. Events such as fishing competitions, power boat races and classic boat shows along the Rideau corridor currently help cater to this market segment.

Ideal potential for tourism investment

As you can see, the Rideau offers a visitor experience that is unique. The Rideau also offers exceptional potential for tourism development, be it capital intensive investment, or tourism product creation that leverages current Rideau services and experiences. Here are just some of the features that make the Rideau a unique opportunity for new tourism investment.

No other place like it!

The variety of tourism product offered by the Rideau Heritage Route makes us unique. With unspoiled beauty and down-to-earth local residents, Rideau visitors can return to a timeless, less complicated way of life—be it on our lakes and rivers or in our hamlets, villages and towns. Our collection of interesting destinations can be explored by car or bicycle through our network of good roads, or by boat along our world-class waterway.

Location

Ideally located among all main travel arteries in Eastern Ontario, the heart of the Rideau is less than an hour's drive from Ottawa and from the historic city of Kingston. Experiencing the Rideau could easily be added to a travel itinerary involving either of these major tourism destinations. Montreal is about 3 hours away, and Toronto is less than 3.5 hours.

Strong, established markets

Ottawa and Kingston provide a permanent resident market for daytrips or extended stays in the Rideau. As well, the strong attraction of these destination cities will continue to draw millions of visitors to Eastern Ontario each year.

Skilled employees

Total employment in the corridor's tourism industry grew 17.5% from 2011 to 2016. With respected Tourism and Hospitality training programs offered by Algonquin College in Ottawa, and St. Lawrence College in Kingston, there is a ready supply of well-trained employees.

Open for new business

The current businesses and community leaders along the Rideau Heritage Route are all receptive to discussing new ideas that would enhance the quality of visitor experiences along the canal and its adjacent villages and towns.

Opportunities for private sector investment

Many types of tourism investment are possible—from improvements to the current infrastructure or product offerings to entirely new ideas. In general terms, there is opportunity for additional accommodations of all types, new signature events such as farm-to-fork experiences, outfitters, interesting retail boutiques, enhanced/new on-water experiences, and new motorcoach tours.

Incentives for private-sector tourism investment

Ontario has strived to establish a positive private-sector investment environment. In fact, Ontario is among the top three destinations in North America for foreign direct investment. New Ontario tourism business investors benefit from a marginal tax rate that has been cut in half since 2009, making it just 16.6% in 2014. Small and medium sized enterprises enjoy a reduced corporate income tax rate of 4.5%.

The Ontario government also offers funding support for investors through various programs, including the Eastern Ontario Economic Development Fund, Celebrate Ontario, the Ontario Sport Hosting Program, and the Tourism Development Fund.

Leveraging Public-Sector Funding

Many opportunities are available for private-sector investment in the Rideau, and the Rideau Heritage Route Tourism Association is actively pursuing these avenues, to the extent they are able. Public-sector funding is needed in two general areas: to upgrade existing infrastructure, as well as new infrastructure investment and secondly, to support the maximization of tourism benefits through efficient and effective marketing initiatives.

Infrastructure investment

Between 2015 to 2020, the federal investment in improvements to the Rideau Canal infrastructure will total more than \$103 million. This investment will help ensure one of historic Rideau's world-class attractions continues to attract visitors to Ontario.

Further infrastructure investment is needed. For example, better docking facilities to help boaters spend more time onshore are needed. As well, wider road shoulders would help keep cyclists safer, and the paddler services along the waterway could be improved.

Further, infrastructure improvements to natural areas would upgrade and expand the tourism offerings of the region. For example, the Rideau hiking trail from Kingston to Ottawa could be developed into a major resource not unlike the Bruce Trail in Southern Ontario. As well, support for converting abandoned railbeds into year-round recreational resources would attract more adventure seekers.

Contact us

The Rideau Heritage Route Tourism Association (RHRTA) Board comprises representatives from various Eastern Ontario municipalities. The RHRTA has a mandate to help stimulate tourism investment, development, marketing, and other activities that enhance the overall selection and quality of visitor experiences. Through liaison and coordination efforts, the RHRTA helps tourism marketing or development ideas to be realized.

Contact:

Ann Weir, Interim Chair
Rideau Heritage Route Tourism Association
32 Wall Street, Suite 300,
Brockville, Ontario K6V 4R9
Email: ann.weir@uclg.on.ca

APPENDIX B: PRIVATE SECTOR INVESTMENT ATTRACTION PROFILE

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time with friends and family trying your hand at landing a roll call of sport fish on the Rideau Canal's varied waterscapes. Go for Largemouth and Smallmouth Bass, Northern Pike, Walleye, Yellow Perch, Lake Trout and the mighty Muskellunge, the biggest local game fish holding the Ontario record of 27.92 kilograms (over 61 lbs)!"

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Both Ottawa and Kingston are significant tourism destinations in Eastern Ontario, and many visitors include the Rideau Heritage Route in their travel plans. This market has significant potential for attracting a greater proportion of domestic and foreign visitors to Ottawa and/or Kingston and the 1000 Islands.

As Canada's national capital, Ottawa attracted over 10.3 million visitors in 2016, including 4.8 million visitors spending at least one night in the capital. Total visitor expenditures approached \$1.7 billion. Most visitors were Canadian, while 555,900 were from overseas and 520,700 were from the USA. About 1,300 motorcoach groups stayed overnight in 2016. Motorcoach operators, especially those catering to European travellers, represent an opportunity for incorporating a truly Canadian waterway experience into their tour itineraries.

Historic Kingston attracts more than 2.5 million visitors annually, with tourism expenditures exceeding \$350 million. It is on Ontario's major highway, half way between Toronto and Montreal. Kingston is the "Gateway to the 1000 Islands" and visitors may already include Ottawa in their plans. For example, motorcoach tours often include both destinations in their itineraries. Kingston's tourism industry actively campaigns to attract visitor markets that align well with what the Rideau has to offer. For example, it is targeting the millennial psychographic that is interested in fishing, cycling, motorcycles, culinary and/or cultural experiences.

Water-lovers markets

The Water-lovers market is significant since visitors spend a few days or longer along the Rideau Heritage Route. The market segment is not limited to large yachts from far and wide travelling the length of the historic Rideau Canal. The waterway also provides opportunities for power boating, canoeing/kayaking, sightseeing cruises, and excellent sport fishing. As well, the Rideau waterways offer the quintessentially Canadian experience of lakeside cottaging, including sunbathing, swimming and watersports. Events such as fishing competitions, power boat races and classic boat shows along the Rideau corridor currently help cater to this market segment.

Specialty markets

Market segments with good potential for further growth include hiking/backpacking along the Rideau Trail, cycling, signature events, birdwatching, geocaching, and all season use of our former rail corridors (including hiking, snowshoeing, cross-country skiing, snowmobiling, ATVs).

Ideal potential for tourism investment

As you can see, the Rideau offers a visitor experience that is unique. The Rideau also offers exceptional potential for tourism development, be it capital intensive investment, or tourism product creation that leverages current Rideau

services and experiences. Here are just some of the features that make the Rideau a unique opportunity for new tourism investment.

No other place like it!

The variety of tourism product offered by the Rideau Heritage Route makes us unique. With unspoiled beauty and down-to-earth local residents, Rideau visitors can return to a timeless, less complicated way of life—be it on our lakes and rivers or in our hamlets, villages and towns. Our collection of interesting destinations can be explored by car or bicycle through our network of good roads, or by boat along our world-class waterway.

Location

Ideally located among all main travel arteries in Eastern Ontario, the heart of the Rideau is less than an hour's drive from Ottawa and from the historic city of Kingston. Experiencing the Rideau could easily be added to a travel itinerary involving either of these major tourism destinations. Montreal is about 3 hours away, and Toronto is less than 3.5 hours.

Strong, established markets

Ottawa and Kingston provide a permanent resident market for daytrips or extended stays in the Rideau. As well, the strong attraction of these destination cities will continue to draw millions of visitors to Eastern Ontario each year.

Skilled employees

Total employment in the corridor's tourism industry grew 17.5% from 2011 to 2016. With respected Tourism and Hospitality training programs offered by Algonquin College in Ottawa, and St. Lawrence College in Kingston, there is a ready supply of well-trained employees.

Open for new business

The current businesses and community leaders along the Rideau Heritage Route are all receptive to discussing new ideas that would enhance the quality of visitor experiences along the canal and its adjacent villages and towns.

Opportunity

Many types of tourism investment are possible—from improvements to the current infrastructure or product offerings to entirely new ideas. In general terms, there is opportunity for additional accommodations of all types, new signature events such as farm-to-fork experiences, outfitters, interesting retail boutiques, enhanced/new on-water experiences, and new motorcoach tours.

Incentives for tourism investment

Ontario is among the top three destinations in North America for foreign direct investment. New Ontario tourism business investors benefit from a marginal tax rate that has been cut in half since 2009, making it just 16.6% in 2014. Small and medium sized enterprises enjoy a reduced corporate income tax rate of 4.5%.

The Ontario government offers funding support for investors through various programs. Here are three examples of such programs:

Eastern Ontario Economic Development Fund

The Eastern Ontario Economic Development Fund provides grants of up to \$1.5 million to expand tourism businesses (or bring new ones) to communities in Eastern Ontario. In addition, investments of more than \$10 million that also create more than 50 new jobs may be eligible for a loan of up to \$5 million.¹¹⁰

Celebrate Ontario

Celebrate Ontario helps new and existing Ontario Festivals and events enhance their programs, activities and services to grow Ontario's tourism market.

¹¹⁰ <https://www.ontario.ca/page/eastern-ontario-development-fund>

Ontario Sport Hosting Program

The Ontario Sport Hosting Program provides funding to help in the delivery of national and international amateur single-sport events.

Tourism Development Fund

The Tourism Development Fund program provides non-capital, project-based funding to not-for-profit organizations and businesses interested in undertaking tourism-related initiatives which support tourism investment, tourism product development and industry capacity building.

Contact us

Your first contact is the Rideau Heritage Route Tourism Association (RHRTA). The RHRTA helps to stimulate tourism investment, development, marketing, and other activities that enhance the overall selection and quality of visitor experiences. We are here to help bring about new tourism development opportunities, and welcome discussions on new ideas or concepts. We can facilitate introductions with local suppliers and community leaders. And we can provide advice on government incentives that may be applicable.

Contact:

Ann Weir, Interim Chair
Rideau Heritage Route Tourism Association
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Brockville, Ontario K6V 4R9
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APPENDIX C: ECONOMIC IMPACT ASSESSMENT DATA

The following tables provide the data for the economic impact of tourism in this report. The grouping shaded in grey isolates the economic impact of tourism on the Rideau Canal specifically, and is comprised of the following sectors:

- Inland water transportation;
- Scenic and sightseeing transportation, water;
- Heritage institutions; and
- Other amusement and recreation industries (as a representation of marinas).

Regional Economic Impact

Census subdivisions included are: Edwardsburgh/Cardinal, Augusta, Prescott, Elizabethtown-Kitley, Brockville, Front of Yonge, Leeds and the Thousand Islands, Gananoque, Wesport, Rideau Lakes, Athens, Merrickville-Wolford, North Grenville, Montague, Smiths Falls, Drummond/North Elmsley, Tay Valley, Perth, Beckwith, Carleton Place, Mississippi Mills, Lanark Highlands, and South Frontenac.

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	12	13	1	1	1	(1)	0.05
Non-scheduled air transportation	<10	<10	Insf. Data	0	0	(1)	0.08
Rail transportation	172	187	15	10	27	(21)	1.10
Deep sea, coastal and Great Lakes water transportation	<10	<10	Insf. Data	0	1	(1)	0.04
Inland water transportation	<10	0	Insf. Data	0	(3)	(1)	0.02
Urban transit systems	47	60	13	3	(1)	12	0.25
Interurban and rural bus transportation	50	77	27	3	2	22	3.94
Taxi and limousine service	78	84	6	4	1	1	0.49
School and employee bus transportation	350	295	(55)	20	(1)	(73)	2.15
Charter bus industry	26	30	4	1	(3)	5	1.54
Other transit and ground passenger transportation	34	114	80	2	21	56	3.61
Scenic and sightseeing transportation, land	0	<10	Insf. Data	0	(0)	1	0.55
Scenic and sightseeing transportation, water	33	29	(4)	2	(4)	(1)	5.95
Motion picture and video industries	63	95	32	4	11	17	0.45
Automotive equipment rental and leasing	15	17	2	1	1	1	0.20

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Travel arrangement and reservation services	105	98	(7)	6	(10)	(3)	0.54
Performing arts companies	81	83	2	5	(3)	0	0.69
Spectator sports	24	23	(1)	1	(3)	1	0.44
Independent artists, writers and performers	298	365	67	17	(13)	63	1.50
Heritage institutions	170	232	62	10	4	48	2.39
Amusement parks and arcades	<10	<10	Insf. Data	0	1	(1)	0.17
Gambling industries	364	385	21	20	(35)	36	2.38
Other amusement and recreation industries	911	1,156	245	51	104	90	1.82
Traveller accommodation	737	1,035	298	41	(21)	277	1.44
Recreational vehicle (RV) parks and recreational camps	117	183	66	7	2	58	2.51
Special food services	153	170	17	9	27	(18)	0.50
Drinking places (alcoholic beverages)	141	130	(11)	8	(17)	(2)	0.69
Full-service restaurants and limited-service eating places	3,470	3,869	399	195	353	(149)	1.06
TOTAL	7,467	8,744	1,277	420	442	415	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.5276	0.1235	0.2519	1.9030
Non-scheduled air transportation	0.5481	0.1294	0.2617	1.9392
Rail transportation	0.2123	0.0436	0.2216	1.4774
Deep sea, coastal and Great Lakes water transportation	0.6008	0.1652	0.3244	2.0904
Inland water transportation	0.3813	0.0892	0.3105	1.7810
Urban transit systems	0.2587	0.0568	0.1774	1.4929
Interurban and rural bus transportation	0.0809	0.0149	0.1193	1.2151
Taxi and limousine service	0.0629	0.0126	0.0526	1.1280
School and employee bus transportation	0.0485	0.0089	0.0739	1.1313
Charter bus industry	0.0980	0.0192	0.0878	1.2049
Other transit and ground passenger transportation	0.0858	0.0161	0.0943	1.1963
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0360	0.0065	0.1475	1.1900
Motion picture and video industries	0.2090	0.0472	0.1015	1.3577
Automotive equipment rental and leasing	0.3548	0.0698	0.2820	1.7065
Travel arrangement and reservation services	0.0743	0.0146	0.0992	1.1880
Performing arts companies	0.1817	0.0249	0.0958	1.3024

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Spectator sports	0.1843	0.0275	0.0918	1.3037
Independent artists, writers and performers	0.2206	0.0324	0.1133	1.3664
Heritage institutions	0.1552	0.0175	0.2153	1.3880
Amusement parks and arcades	0.2246	0.0327	0.1166	1.3740
Gambling industries	0.1260	0.0142	0.1464	1.2866
Other amusement and recreation industries	0.0948	0.0107	0.0852	1.1908
Traveller accommodation	0.0678	0.0136	0.0464	1.1278
Recreational vehicle (RV) parks and recreational camps	0.0594	0.0099	0.0705	1.1397
Special food services	0.1133	0.0249	0.0763	1.2145
Drinking places (alcoholic beverages)	0.0756	0.0145	0.0586	1.1487
Full-service restaurants and limited-service eating places	0.0615	0.0107	0.0529	1.1251

Rideau Heritage Corridor (with Ottawa and Kingston)

Census subdivisions included are: Ottawa, Leeds and the Thousand Islands, Westport, Rideau Lakes, Merrickville-Wolford, North Grenville, Montague, Smiths Falls, Drummond/North Elmsley, Tay Valley, Perth, Kingston, South Frontenac, Beckwith, Carleton Place, Lanark Highlands, and Mississippi Mills.

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	1,105	1,498	393	62	86	245	0.63
Non-scheduled air transportation	194	269	75	11	2	62	0.54
Rail transportation	227	246	19	13	35	(29)	0.15
Deep sea, coastal and Great Lakes water transportation	<10	<10	Insf. Data	0	0	(1)	0.00
Inland water transportation	18	0	(18)	1	(13)	(5)	0.01
Urban transit systems	1,549	1,984	435	87	(17)	365	0.85
Interurban and rural bus transportation	78	91	13	4	4	5	0.48
Taxi and limousine service	1,398	1,837	439	79	10	350	1.10
School and employee bus transportation	1,252	1,680	428	71	(3)	360	1.27
Charter bus industry	119	148	29	7	(14)	36	0.79
Other transit and ground passenger transportation	136	285	149	8	84	58	0.94
Scenic and sightseeing transportation, land	0	<10	Insf. Data	0	(0)	5	0.27
Scenic and sightseeing transportation, water	85	95	10	5	(12)	17	2.00
Motion picture and video industries	1,074	1,743	669	60	182	426	0.86

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Automotive equipment rental and leasing	660	686	26	37	45	(56)	0.81
Travel arrangement and reservation services	1,600	1,615	15	90	(151)	77	0.92
Performing arts companies	930	771	(159)	52	(34)	(178)	0.67
Spectator sports	714	514	(200)	40	(101)	(139)	1.00
Independent artists, writers and performers	1,942	2,346	404	109	(85)	380	1.00
Heritage institutions	925	1,019	94	52	24	18	1.09
Amusement parks and arcades	123	134	11	7	32	(27)	0.37
Gambling industries	272	207	(65)	15	(26)	(54)	0.13
Other amusement and recreation industries	4,230	5,780	1,550	238	485	826	0.94
Traveller accommodation	5,741	7,115	1,374	323	(161)	1,210	1.03
Recreational vehicle (RV) parks and recreational camps	269	295	26	15	4	7	0.42
Special food services	3,021	3,243	222	170	529	(478)	0.99
Drinking places (alcoholic beverages)	1,313	1,358	45	74	(154)	125	0.75
Full-service restaurants and limited-service eating places	29,583	34,687	5,104	1,666	3,008	430	0.99
TOTAL	58,559	69,649	11,090	3,297	3,757	4,036	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.4647	0.1229	0.2802	1.8677
Non-scheduled air transportation	0.4535	0.1260	0.2854	1.8650
Rail transportation	0.3395	0.1073	0.3269	1.7737
Deep sea, coastal and Great Lakes water transportation	0.4043	0.1393	0.3200	1.8637
Inland water transportation	0.4698	0.1422	0.3824	1.9943
Urban transit systems	0.2371	0.0613	0.2071	1.5055
Interurban and rural bus transportation	0.2856	0.0753	0.2732	1.6341
Taxi and limousine service	0.1218	0.0295	0.1345	1.2859
School and employee bus transportation	0.1173	0.0287	0.1169	1.2629
Charter bus industry	0.1537	0.0402	0.1343	1.3282
Other transit and ground passenger transportation	0.1743	0.0415	0.2186	1.4343
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.1341	0.0307	0.2155	1.3803
Motion picture and video industries	0.3923	0.1251	0.2569	1.7743
Automotive equipment rental and leasing	0.3156	0.0696	0.4184	1.8037

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Travel arrangement and reservation services	0.0884	0.0199	0.1669	1.2752
Performing arts companies	0.1764	0.0330	0.1174	1.3268
Spectator sports	0.2343	0.0413	0.1958	1.4714
Independent artists, writers and performers	0.2140	0.0378	0.1944	1.4461
Heritage institutions	0.2673	0.0466	0.2674	1.5813
Amusement parks and arcades	0.1726	0.0319	0.1072	1.3117
Gambling industries	0.2938	0.0564	0.1927	1.5429
Other amusement and recreation industries	0.1578	0.0282	0.1079	1.2939
Traveller accommodation	0.1225	0.0324	0.1157	1.2706
Recreational vehicle (RV) parks and recreational camps	0.1134	0.0343	0.0934	1.2411
Special food services	0.0872	0.0230	0.0889	1.1991
Drinking places (alcoholic beverages)	0.0863	0.0234	0.0779	1.1877
Full-service restaurants and limited-service eating places	0.0758	0.0200	0.0773	1.1731

Regional Heritage Corridor (without Ottawa and Kingston)

Census subdivisions included are: Leeds and the Thousand Islands, Westport, Rideau Lakes, Merrickville-Wolford, North Grenville, Montague, Smiths Falls, Drummond/North Elmsley, Tay Valley, Perth, South Frontenac, Beckwith, Carleton Place, Lanark Highlands, and Mississippi Mills.

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	<10	<10	Insf. Data	0	0	(1)	0.07
Rail transportation	158	171	13	9	25	(21)	2.45
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	11	15	4	1	(0)	4	0.16
Interurban and rural bus transportation	23	34	11	1	1	10	4.29
Taxi and limousine service	21	22	1	1	0	(0)	0.31
School and employee bus transportation	205	180	(25)	12	(1)	(36)	3.20
Charter bus industry	<10	<10	Insf. Data	0	(1)	2	1.08
Other transit and ground passenger transportation	11	40	29	1	7	21	3.09
Scenic and sightseeing transportation, land	0	<10	Insf. Data	0	(0)	1	0.50

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scenic and sightseeing transportation, water	<10	<10	Insf. Data	0	(1)	(1)	2.02
Motion picture and video industries	22	25	3	1	4	(2)	0.29
Automotive equipment rental and leasing	<10	<10	Insf. Data	0	0	1	0.03
Travel arrangement and reservation services	54	56	2	3	(5)	3	0.75
Performing arts companies	26	18	(8)	1	(1)	(9)	0.36
Spectator sports	<10	<10	Insf. Data	0	(1)	(1)	0.22
Independent artists, writers and performers	156	201	45	9	(7)	42	2.02
Heritage institutions	123	179	56	7	3	46	4.51
Amusement parks and arcades	<10	<10	Insf. Data	0	1	(1)	0.41
Gambling industries	<10	<10	Insf. Data	0	(1)	(4)	0.06
Other amusement and recreation industries	434	570	136	24	50	62	2.19
Traveller accommodation	381	519	138	21	(11)	127	1.76
Recreational vehicle (RV) parks and recreational camps	68	104	36	4	1	30	3.46
Special food services	69	82	13	4	12	(3)	0.59
Drinking places (alcoholic beverages)	70	60	(10)	4	(8)	(6)	0.78
Full-service restaurants and limited-service eating places	1,435	1,579	144	81	146	(83)	1.06
TOTAL	3,306	3,886	580	186	214	181	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.4561	0.1008	0.1850	1.7419
Rail transportation	0.0955	0.0146	0.1389	1.2490
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.2476	0.0470	0.1383	1.4329
Interurban and rural bus transportation	0.0631	0.0093	0.0883	1.1608
Taxi and limousine service	0.0595	0.0098	0.0433	1.1126
School and employee bus transportation	0.0308	0.0045	0.0515	1.0868
Charter bus industry	0.1172	0.0188	0.0915	1.2275
Other transit and ground passenger transportation	0.1059	0.0161	0.1156	1.2376
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0801	0.0117	0.0907	1.1825

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Motion picture and video industries	0.1614	0.0321	0.0908	1.2843
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0598	0.0098	0.0710	1.1406
Performing arts companies	0.1770	0.0230	0.0727	1.2728
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0815	0.0073	0.1823	1.2711
Amusement parks and arcades	0.1591	0.0175	0.0796	1.2562
Gambling industries	0.3024	0.0388	0.1242	1.4654
Other amusement and recreation industries	0.0761	0.0069	0.0626	1.1457
Traveller accommodation	0.0535	0.0089	0.0310	1.0934
Recreational vehicle (RV) parks and recreational camps	0.0386	0.0054	0.0520	1.0959
Special food services	0.0862	0.0162	0.0490	1.1514
Drinking places (alcoholic beverages)	0.0604	0.0100	0.0407	1.1111
Full-service restaurants and limited-service eating places	0.0534	0.0081	0.0380	1.0995

United Counties of Leeds and Grenville

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	<10	<10	Insf. Data	0	0	(1)	0.10
Non-scheduled air transportation	<10	<10	Insf. Data	0	0	(1)	0.12
Rail transportation	<10	<10	Insf. Data	0	1	(4)	0.11
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	<10	12	Insf. Data	1	(0)	2	0.21
Interurban and rural bus transportation	15	24	9	1	1	7	4.97
Taxi and limousine service	29	30	1	2	0	(1)	0.69
School and employee bus transportation	108	95	(13)	6	(0)	(19)	2.81
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	<10	Insf. Data	0	(0)	1	0.90
Scenic and sightseeing	14	11	(3)	1	(2)	(1)	9.41

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
transportation, water							
Motion picture and video industries	<10	15	Insf. Data	1	2	3	0.29
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	35	34	(1)	2	(3)	0	0.76
Performing arts companies	26	18	(8)	1	(1)	(9)	0.59
Spectator sports	<10	<10	Insf. Data	0	(1)	(1)	0.37
Independent artists, writers and performers	56	51	(5)	3	(2)	(5)	0.86
Heritage institutions	73	92	19	4	2	13	3.84
Amusement parks and arcades	<10	<10	Insf. Data	0	1	(1)	0.68
Gambling industries	<10	<10	Insf. Data	0	(1)	(4)	0.11
Other amusement and recreation industries	338	432	94	19	39	36	2.76
Traveller accommodation	322	389	67	18	(9)	58	2.19
Recreational vehicle (RV) parks and recreational camps	88	144	56	5	1	49	7.97
Special food services	58	65	7	3	10	(6)	0.78
Drinking places (alcoholic beverages)	55	56	1	3	(6)	5	1.21
Full-service restaurants and limited-service eating places	678	806	128	38	69	20	0.90
TOTAL	1,949	2,303	354	110	100	144	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.4178	0.0666	0.1134	1.5979
Non-scheduled air transportation	0.4200	0.0665	0.1169	1.6033
Rail transportation	0.3273	0.0467	0.1722	1.5462
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.2266	0.0375	0.0904	1.3545
Interurban and rural bus transportation	0.0503	0.0069	0.0586	1.1157
Taxi and limousine service	0.0305	0.0043	0.0216	1.0564
School and employee bus transportation	0.0305	0.0041	0.0319	1.0666
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0174	0.0023	0.0714	1.0911
Motion picture and video industries	0.1583	0.0263	0.0611	1.2457

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0459	0.0059	0.0455	1.0973
Performing arts companies	0.1602	0.0175	0.0485	1.2263
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0691	0.0054	0.0518	1.1263
Amusement parks and arcades	0.1149	0.0099	0.0518	1.1767
Gambling industries	0.2741	0.0296	0.0829	1.3865
Other amusement and recreation industries	0.0539	0.0041	0.0454	1.1034
Traveller accommodation	0.0394	0.0047	0.0200	1.0641
Recreational vehicle (RV) parks and recreational camps	0.0175	0.0021	0.0306	1.0502
Special food services	0.1038	0.0137	0.0460	1.1636
Drinking places (alcoholic beverages)	0.0479	0.0057	0.0304	1.0839
Full-service restaurants and limited-service eating places	0.0527	0.0064	0.0260	1.0851

United Counties of Leeds and Grenville (Rideau Heritage corridor)

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	<10	<10	Insf. Data	0	0	(1)	0.20
Rail transportation	<10	<10	Insf. Data	0	1	(4)	0.17
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	<10	<10	Insf. Data	0	(0)	1	0.16
Interurban and rural bus transportation	15	24	9	1	1	7	8.14
Taxi and limousine service	16	16	0	1	0	(1)	0.62
School and employee bus transportation	63	60	(3)	4	(0)	(6)	2.88
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	0.76
Scenic and sightseeing transportation, water	<10	<10	Insf. Data	0	(1)	(1)	5.47

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Motion picture and video industries	<10	15	Insf. Data	1	2	3	0.47
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	30	31	1	2	(3)	2	1.14
Performing arts companies	26	18	(8)	1	(1)	(9)	0.97
Spectator sports	<10	<10	Insf. Data	0	(1)	(1)	0.61
Independent artists, writers and performers	40	35	(5)	2	(2)	(6)	0.96
Heritage institutions	36	54	18	2	1	14	3.67
Amusement parks and arcades	<10	<10	Insf. Data	0	1	(1)	1.12
Gambling industries	<10	<10	Insf. Data	0	(1)	(4)	0.17
Other amusement and recreation industries	284	339	55	16	33	7	3.54
Traveller accommodation	286	324	38	16	(8)	29	2.98
Recreational vehicle (RV) parks and recreational camps	60	98	38	3	1	35	8.94
Special food services	35	40	5	2	6	(3)	0.79
Drinking places (alcoholic beverages)	30	26	(4)	2	(4)	(3)	0.90
Full-service restaurants and limited-service eating places	511	589	78	29	52	(3)	1.07
TOTAL	1,481	1,700	219	83	77	58	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.3407	0.0397	0.1156	1.4960
Rail transportation	0.2798	0.0327	0.1820	1.4945
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.2041	0.0299	0.0943	1.3282
Interurban and rural bus transportation	0.0287	0.0030	0.0606	1.0923
Taxi and limousine service	0.0299	0.0035	0.0228	1.0562
School and employee bus transportation	0.0287	0.0031	0.0318	1.0637
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0244	0.0026	0.0615	1.0884
Motion picture and video industries	0.1482	0.0211	0.0651	1.2344
Automotive equipment rental and	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
leasing				
Travel arrangement and reservation services	0.0344	0.0036	0.0473	1.0852
Performing arts companies	0.1393	0.0118	0.0496	1.2007
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0858	0.0053	0.0556	1.1467
Amusement parks and arcades	0.0867	0.0054	0.0530	1.1452
Gambling industries	0.2393	0.0201	0.0849	1.3443
Other amusement and recreation industries	0.0429	0.0024	0.0476	1.0930
Traveller accommodation	0.0297	0.0027	0.0196	1.0521
Recreational vehicle (RV) parks and recreational camps	0.0164	0.0015	0.0322	1.0501
Special food services	0.0853	0.0088	0.0469	1.1409
Drinking places (alcoholic beverages)	0.0507	0.0049	0.0322	1.0878
Full-service restaurants and limited-service eating places	0.0438	0.0041	0.0260	1.0740

Lanark County

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	<10	<10	Insf. Data	0	0	(0)	0.11
Non-scheduled air transportation	<10	<10	Insf. Data	0	0	0	0.17
Rail transportation	13	16	3	1	2	(0)	0.36
Deep sea, coastal and Great Lakes water transportation	<10	<10	Insf. Data	0	1	(1)	0.13
Inland water transportation	<10	0	Insf. Data	0	(3)	(1)	0.08
Urban transit systems	<10	<10	Insf. Data	0	(0)	0	0.13
Interurban and rural bus transportation	<10	14	Insf. Data	1	0	4	2.72
Taxi and limousine service	<10	<10	Insf. Data	0	0	(3)	0.08
School and employee bus transportation	71	66	(5)	4	(0)	(8)	1.82
Charter bus industry	<10	<10	Insf. Data	0	(1)	1	1.76
Other transit and ground passenger transportation	13	39	26	1	8	17	4.69
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	0.36
Scenic and sightseeing transportation, water	<10	<10	Insf. Data	0	(1)	0	3.30
Motion picture and video industries	41	33	(8)	2	7	(16)	0.60

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Automotive equipment rental and leasing	<10	<10	Insf. Data	0	0	(1)	0.03
Travel arrangement and reservation services	30	29	(1)	2	(3)	0	0.60
Performing arts companies	29	19	(10)	2	(1)	(10)	0.61
Spectator sports	12	13	1	1	(2)	2	0.92
Independent artists, writers and performers	162	205	43	9	(7)	41	3.20
Heritage institutions	<10	<10	Insf. Data	0	0	(1)	0.29
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	<10	<10	Insf. Data	0	(0)	(1)	0.06
Other amusement and recreation industries	305	416	111	17	35	59	2.48
Traveller accommodation	73	264	191	4	(2)	189	1.39
Recreational vehicle (RV) parks and recreational camps	15	20	5	1	0	4	1.04
Special food services	34	37	3	2	6	(5)	0.42
Drinking places (alcoholic beverages)	52	51	(1)	3	(6)	2	1.02
Full-service restaurants and limited-service eating places	994	1,071	77	56	101	(80)	1.11
TOTAL	1,906	2,341	435	107	134	193	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.3996	0.0709	0.1497	1.6203
Non-scheduled air transportation	0.3791	0.0650	0.1505	1.5946
Rail transportation	0.2222	0.0328	0.2135	1.4685
Deep sea, coastal and Great Lakes water transportation	0.4197	0.0941	0.1886	1.7024
Inland water transportation	0.0711	0.0099	0.1642	1.2452
Urban transit systems	0.1782	0.0309	0.0877	1.2968
Interurban and rural bus transportation	0.0501	0.0067	0.0705	1.1273
Taxi and limousine service	0.0588	0.0097	0.0355	1.1040
School and employee bus transportation	0.0435	0.0058	0.0558	1.1052
Charter bus industry	0.0404	0.0055	0.0443	1.0902
Other transit and ground passenger transportation	0.0302	0.0040	0.0413	1.0756
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0340	0.0044	0.1170	1.1553
Motion picture and video industries	0.3723	0.0683	0.1879	1.6285
Automotive equipment rental and leasing	0.1712	0.0262	0.1028	1.3002

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Travel arrangement and reservation services	0.0657	0.0098	0.0678	1.1433
Performing arts companies	0.1960	0.0193	0.0807	1.2960
Spectator sports	0.2142	0.0203	0.0917	1.3262
Independent artists, writers and performers	0.1907	0.0165	0.0927	1.3000
Heritage institutions	0.4188	0.0358	0.2168	1.6714
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.2012	0.0225	0.0709	1.2946
Other amusement and recreation industries	0.0577	0.0046	0.0409	1.1032
Traveller accommodation	0.0723	0.0114	0.0327	1.1164
Recreational vehicle (RV) parks and recreational camps	0.0502	0.0055	0.0488	1.1045
Special food services	0.0505	0.0076	0.0249	1.0831
Drinking places (alcoholic beverages)	0.0413	0.0048	0.0294	1.0755
Full-service restaurants and limited-service eating places	0.0513	0.0060	0.0330	1.0902

Lanark County (Rideau Heritage corridor)

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	0	0	0	0	0	0	0.00
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	0	0	0	0	0	0	0.00
School and employee bus transportation	45	44	(1)	3	(0)	(4)	2.60
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	<10	25	Insf. Data	0	2	19	6.38
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	0.57
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	13	10	(3)	1	2	(5)	0.39
Automotive equipment rental and	0	0	0	0	0	0	0.00

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
leasing							
Travel arrangement and reservation services	19	19	0	1	(2)	1	0.86
Performing arts companies	0	0	0	0	0	0	0.00
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and performers	58	78	20	3	(3)	18	2.61
Heritage institutions	<10	<10	Insf. Data	0	0	(1)	0.63
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	0	0	0	0	0	0	0.00
Other amusement and recreation industries	95	152	57	5	11	41	1.95
Traveller accommodation	50	136	86	3	(1)	85	1.54
Recreational vehicle (RV) parks and recreational camps	<10	<10	Insf. Data	0	0	(4)	0.58
Special food services	14	17	3	1	2	(0)	0.40
Drinking places (alcoholic beverages)	22	24	2	1	(3)	3	1.02
Full-service restaurants and limited-service eating places	443	464	21	25	45	(48)	1.04
TOTAL	778	981	203	44	54	105	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0000	0.0000	0.0000	0.0000
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0000	0.0000	0.0000	0.0000
School and employee bus transportation	0.0134	0.0010	0.0180	1.0325
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
services				
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0375	0.0016	0.0620	1.1011
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.0000	0.0000	0.0000	0.0000
Other amusement and recreation industries	0.0000	0.0000	0.0000	0.0000
Traveller accommodation	0.0358	0.0028	0.0094	1.0479
Recreational vehicle (RV) parks and recreational camps	0.0053	0.0004	0.0145	1.0202
Special food services	0.0204	0.0017	0.0071	1.0293
Drinking places (alcoholic beverages)	0.0099	0.0008	0.0087	1.0194
Full-service restaurants and limited-service eating places	0.0589	0.0046	0.0145	1.0779

Drummond/North Elmsley

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	0	0	0	0	0	0	0.00
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	0	0	0	0	0	0	0.00
School and employee bus transportation	<10	<10	Insf. Data	0	(0)	(1)	5.35
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	0	0	0	0	0	0	0.00
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Travel arrangement and reservation services	0	0	0	0	0	0	0.00
Performing arts companies	0	0	0	0	0	0	0.00
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and performers	<10	<10	Insf. Data	0	(0)	(0)	2.50
Heritage institutions	<10	<10	Insf. Data	0	0	(0)	3.62
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	0	0	0	0	0	0	0.00
Other amusement and recreation industries	<10	22	Insf. Data	0	1	13	4.47
Traveller accommodation	<10	33	Insf. Data	0	(0)	27	5.88
Recreational vehicle (RV) parks and recreational camps	0	0	0	0	0	0	0.00
Special food services	<10	<10	Insf. Data	0	1	(1)	1.17
Drinking places (alcoholic beverages)	<10	<10	Insf. Data	0	(1)	1	4.24
Full-service restaurants and limited-service eating places	0	0	0	0	0	0	0.00
TOTAL	37	78	41	2	1	39	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0000	0.0000	0.0000	0.0000
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0000	0.0000	0.0000	0.0000
School and employee bus transportation	0.0113	0.0006	0.0263	1.0381
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0334	0.0011	0.0921	1.1266
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.0000	0.0000	0.0000	0.0000
Other amusement and recreation industries	0.0000	0.0000	0.0000	0.0000
Traveller accommodation	0.0000	0.0000	0.0000	0.0000
Recreational vehicle (RV) parks and recreational camps	0.0000	0.0000	0.0000	0.0000
Special food services	0.0157	0.0009	0.0104	1.0270
Drinking places (alcoholic beverages)	0.0099	0.0006	0.0129	1.0234
Full-service restaurants and limited-service eating places	0.0000	0.0000	0.0000	0.0000

Leeds and the Thousand Islands

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	<10	<10	Insf. Data	0	0	(1)	1.17
Rail transportation	<10	<10	Insf. Data	0	1	(4)	0.99
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	<10	<10	Insf. Data	0	0	(1)	0.51
School and employee bus transportation	0	0	0	0	0	0	0.00
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	0.68
Scenic and sightseeing transportation, water	<10	<10	Insf. Data	0	(1)	(1)	31.50
Motion picture and video industries	0	0	0	0	0	0	0.00
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation	30	31	1	2	(3)	2	6.55

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
services							
Performing arts companies	<10	<10	Insf. Data	0	(0)	1	1.82
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and performers	<10	<10	Insf. Data	1	(0)	(1)	1.31
Heritage institutions	<10	<10	Insf. Data	0	0	3	2.79
Amusement parks and arcades	<10	<10	Insf. Data	0	1	(1)	6.43
Gambling industries	<10	<10	Insf. Data	0	(0)	(2)	0.53
Other amusement and recreation industries	113	122	9	6	13	(10)	7.34
Traveller accommodation	151	184	33	9	(4)	28	9.73
Recreational vehicle (RV) parks and recreational camps	<10	11	Insf. Data	0	0	3	5.50
Special food services	0	0	0	0	0	0	0.00
Drinking places (alcoholic beverages)	<10	<10	Insf. Data	0	(1)	1	1.20
Full-service restaurants and limited-service eating places	52	61	9	3	5	1	0.64
TOTAL	404	456	52	23	11	19	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.1443	0.0066	0.0503	1.2012
Rail transportation	0.1254	0.0060	0.0800	1.2115
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0222	0.0015	0.0111	1.0348
School and employee bus transportation	0.0000	0.0000	0.0000	0.0000
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0050	0.0003	0.0317	1.0370
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0081	0.0004	0.0231	1.0315
Performing arts companies	0.0416	0.0018	0.0221	1.0654

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0761	0.0037	0.0276	1.1074
Amusement parks and arcades	0.0191	0.0006	0.0250	1.0446
Gambling industries	0.1102	0.0055	0.0389	1.1546
Other amusement and recreation industries	0.0185	0.0006	0.0238	1.0428
Traveller accommodation	0.0086	0.0005	0.0095	1.0186
Recreational vehicle (RV) parks and recreational camps	0.0136	0.0008	0.0159	1.0304
Special food services	0.0000	0.0000	0.0000	0.0000
Drinking places (alcoholic beverages)	0.0255	0.0017	0.0154	1.0425
Full-service restaurants and limited-service eating places	0.0333	0.0024	0.0136	1.0493

Merrickville-Wolford

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	0	0	0	0	0	0	0.00
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	0	0	0	0	0	0	0.00
School and employee bus transportation	0	0	0	0	0	0	0.00
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	1.50
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	0	0	0	0	0	0	0.00
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	0	0	0	0	0	0	0.00

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Performing arts companies	21	12	(9)	1	(1)	(10)	7.04
Spectator sports	<10	<10	Insf. Data	0	(1)	(1)	6.50
Independent artists, writers and performers	<10	<10	Insf. Data	1	(0)	(2)	2.21
Heritage institutions	<10	<10	Insf. Data	0	0	0	3.01
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	<10	<10	Insf. Data	0	(0)	(1)	0.40
Other amusement and recreation industries	17	28	11	1	2	8	3.12
Traveller accommodation	<10	<10	Insf. Data	0	(0)	(2)	0.37
Recreational vehicle (RV) parks and recreational camps	<10	10	Insf. Data	0	0	3	9.96
Special food services	<10	<10	Insf. Data	0	1	(2)	0.98
Drinking places (alcoholic beverages)	<10	<10	Insf. Data	0	(1)	1	2.45
Full-service restaurants and limited-service eating places	25	32	7	1	3	2	0.62
TOTAL	109	114	5	6	2	(3)	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0000	0.0000	0.0000	0.0000
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0000	0.0000	0.0000	0.0000
School and employee bus transportation	0.0000	0.0000	0.0000	0.0000
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0000	0.0000	0.0000	0.0000
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0437	0.0012	0.0126	1.0575
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.1024	0.0033	0.0181	1.1237
Other amusement and recreation industries	0.0864	0.0030	0.0133	1.1027
Traveller accommodation	0.0261	0.0011	0.0055	1.0327
Recreational vehicle (RV) parks and recreational camps	0.0071	0.0003	0.0074	1.0147
Special food services	0.0000	0.0000	0.0000	0.0000
Drinking places (alcoholic beverages)	0.0164	0.0006	0.0070	1.0241
Full-service restaurants and limited-service eating places	0.0303	0.0012	0.0061	1.0376

North Grenville

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	0	0	0	0	0	0	0.00
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	<10	<10	Insf. Data	0	(0)	1	0.32
Interurban and rural bus transportation	15	24	9	1	1	7	15.88
Taxi and limousine service	<10	<10	Insf. Data	0	0	1	0.44
School and employee bus transportation	63	60	(3)	4	(0)	(6)	5.62
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	0.42
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	<10	<10	Insf. Data	0	1	1	0.52
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	0	0	0	0	0	0	0.00
Performing arts companies	0	0	0	0	0	0	0.00

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and performers	<10	<10	Insf. Data	0	(0)	(2)	0.33
Heritage institutions	<10	<10	Insf. Data	0	0	1	0.65
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	<10	<10	Insf. Data	0	(0)	(1)	0.09
Other amusement and recreation industries	76	73	(3)	4	9	(15)	1.49
Traveller accommodation	11	29	18	1	(0)	18	0.53
Recreational vehicle (RV) parks and recreational camps	13	23	10	1	0	9	4.05
Special food services	30	36	6	2	5	(1)	1.36
Drinking places (alcoholic beverages)	12	<10	Insf. Data	1	(1)	(4)	0.53
Full-service restaurants and limited-service eating places	405	475	70	23	41	7	1.69
TOTAL	655	761	106	37	54	15	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0000	0.0000	0.0000	0.0000
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.1542	0.0163	0.0712	1.2417
Interurban and rural bus transportation	0.0161	0.0013	0.0478	1.0652
Taxi and limousine service	0.0316	0.0031	0.0184	1.0531
School and employee bus transportation	0.0161	0.0013	0.0228	1.0403
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.1283	0.0152	0.0551	1.1987
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0000	0.0000	0.0000	0.0000
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
performers				
Heritage institutions	0.1417	0.0096	0.0465	1.1977
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.2157	0.0155	0.0656	1.2968
Other amusement and recreation industries	0.0695	0.0034	0.0393	1.1122
Traveller accommodation	0.0501	0.0056	0.0199	1.0757
Recreational vehicle (RV) parks and recreational camps	0.0420	0.0033	0.0262	1.0714
Special food services	0.0578	0.0046	0.0349	1.0974
Drinking places (alcoholic beverages)	0.0568	0.0053	0.0257	1.0878
Full-service restaurants and limited-service eating places	0.0323	0.0024	0.0188	1.0535

Rideau Lakes

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	0	0	0	0	0	0	0.00
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	<10	<10	Insf. Data	0	0	1	1.25
School and employee bus transportation	0	0	0	0	0	0	0.00
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	0.87
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	<10	<10	Insf. Data	0	0	3	1.29
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	0	0	0	0	0	0	0.00
Performing arts companies	0	0	0	0	0	0	0.00
Spectator sports	0	0	0	0	0	0	0.00

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Independent artists, writers and performers	<10	<10	Insf. Data	0	(0)	(1)	0.85
Heritage institutions	22	33	11	1	1	9	14.50
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	0	0	0	0	0	0	0.00
Other amusement and recreation industries	69	104	35	4	8	23	7.04
Traveller accommodation	77	61	(16)	4	(2)	(18)	3.67
Recreational vehicle (RV) parks and recreational camps	25	45	20	1	0	18	26.37
Special food services	0	0	0	0	0	0	0.00
Drinking places (alcoholic beverages)	<10	<10	Insf. Data	0	(0)	(1)	0.55
Full-service restaurants and limited-service eating places	0	0	0	0	0	0	0.00
TOTAL	209	261	52	12	6	34	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0000	0.0000	0.0000	0.0000
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0089	0.0004	0.0086	1.0179
School and employee bus transportation	0.0000	0.0000	0.0000	0.0000
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.1107	0.0096	0.0231	1.1433
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0000	0.0000	0.0000	0.0000
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Heritage institutions	0.0183	0.0005	0.0215	1.0403
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.0000	0.0000	0.0000	0.0000
Other amusement and recreation industries	0.0176	0.0005	0.0188	1.0369
Traveller accommodation	0.0095	0.0005	0.0080	1.0179
Recreational vehicle (RV) parks and recreational camps	0.0031	0.0002	0.0130	1.0163
Special food services	0.0000	0.0000	0.0000	0.0000
Drinking places (alcoholic beverages)	0.0251	0.0014	0.0126	1.0391
Full-service restaurants and limited-service eating places	0.0000	0.0000	0.0000	0.0000

Smiths Falls

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	145	156	11	8	23	(19)	9.74
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	0	0	0	0	0	0	0.00
School and employee bus transportation	72	58	(14)	4	(0)	(18)	4.46
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	0.23
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	0	0	0	0	0	0	0.00
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	0	0	0	0	0	0	0.00
Performing arts companies	0	0	0	0	0	0	0.00
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and	<10	14	Insf. Data	1	(0)	4	0.59

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
performers							
Heritage institutions	79	118	39	4	2	32	12.90
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	0	0	0	0	0	0	0.00
Other amusement and recreation industries	31	57	26	2	4	21	0.95
Traveller accommodation	39	56	17	2	(1)	16	0.83
Recreational vehicle (RV) parks and recreational camps	0	0	0	0	0	0	0.00
Special food services	14	17	3	1	2	(1)	0.52
Drinking places (alcoholic beverages)	12	<10	Insf. Data	1	(1)	(5)	0.39
Full-service restaurants and limited-service eating places	448	486	38	25	46	(33)	1.42
TOTAL	849	968	119	48	73	(2)	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0322	0.0022	0.0650	1.0995
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0000	0.0000	0.0000	0.0000
School and employee bus transportation	0.0233	0.0017	0.0250	1.0500
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0000	0.0000	0.0000	0.0000
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0355	0.0018	0.1355	1.1728

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.0000	0.0000	0.0000	0.0000
Other amusement and recreation industries	0.0991	0.0074	0.0317	1.1382
Traveller accommodation	0.0654	0.0077	0.0212	1.0943
Recreational vehicle (RV) parks and recreational camps	0.0000	0.0000	0.0000	0.0000
Special food services	0.0611	0.0074	0.0164	1.0849
Drinking places (alcoholic beverages)	0.0673	0.0079	0.0214	1.0967
Full-service restaurants and limited-service eating places	0.0417	0.0039	0.0210	1.0665

South Frontenac

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	<10	10	Insf. Data	0	1	2	1.41
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	<10	<10	Insf. Data	0	(0)	3	0.93
Interurban and rural bus transportation	<10	10	Insf. Data	0	0	2	12.62
Taxi and limousine service	<10	<10	Insf. Data	0	0	1	0.81
School and employee bus transportation	26	19	(7)	1	(0)	(8)	3.30
Charter bus industry	<10	<10	Insf. Data	0	(1)	2	10.53
Other transit and ground passenger transportation	<10	15	Insf. Data	0	5	2	11.52
Scenic and sightseeing transportation, land	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	0	0	0	0	0	0	0.00
Automotive equipment rental and leasing	<10	<10	Insf. Data	0	0	1	0.32
Travel arrangement and reservation services	<10	<10	Insf. Data	0	(0)	0	0.68
Performing arts companies	0	0	0	0	0	0	0.00
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and performers	48	74	26	3	(2)	25	7.28

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Heritage institutions	0	0	0	0	0	0	0.00
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	0	0	0	0	0	0	0.00
Other amusement and recreation industries	25	22	(3)	1	3	(7)	0.84
Traveller accommodation	<10	<10	Insf. Data	0	(0)	(3)	0.10
Recreational vehicle (RV) parks and recreational camps	0	0	0	0	0	0	0.00
Special food services	<10	<10	Insf. Data	0	1	1	0.57
Drinking places (alcoholic beverages)	<10	<10	Insf. Data	0	(1)	(1)	0.50
Full-service restaurants and limited-service eating places	35	41	6	2	4	1	0.27
TOTAL	197	238	41	11	9	20	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.1167	0.0142	0.0531	1.1839
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.1344	0.0171	0.0319	1.1834
Interurban and rural bus transportation	0.0137	0.0013	0.0207	1.0357
Taxi and limousine service	0.0262	0.0026	0.0171	1.0459
School and employee bus transportation	0.0163	0.0016	0.0122	1.0300
Charter bus industry	0.0116	0.0011	0.0199	1.0325
Other transit and ground passenger transportation	0.0085	0.0008	0.0262	1.0355
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0385	0.0039	0.0185	1.0608
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0000	0.0000	0.0000	0.0000
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Gambling industries	0.0000	0.0000	0.0000	0.0000
Other amusement and recreation industries	0.0616	0.0041	0.0141	1.0798
Traveller accommodation	0.0833	0.0106	0.0139	1.1078
Recreational vehicle (RV) parks and recreational camps	0.0000	0.0000	0.0000	0.0000
Special food services	0.0490	0.0061	0.0103	1.0655
Drinking places (alcoholic beverages)	0.0388	0.0044	0.0095	1.0528
Full-service restaurants and limited-service eating places	0.0542	0.0070	0.0099	1.0712

Tay Valley

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	0	0	0	0	0	0	0.00
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	0	0	0	0	0	0	0.00
School and employee bus transportation	<10	<10	Insf. Data	0	(0)	(5)	1.43
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	5.61
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	<10	<10	Insf. Data	0	1	(3)	1.77
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	0	0	0	0	0	0	0.00
Performing arts companies	0	0	0	0	0	0	0.00
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and performers	<10	<10	Insf. Data	0	(0)	(1)	2.22
Heritage institutions	<10	<10	Insf. Data	0	0	(0)	1.95

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Amusement parks and arcades	0	0	0	0	0	0	0.00
Gambling industries	0	0	0	0	0	0	0.00
Other amusement and recreation industries	<10	18	Insf. Data	0	1	10	2.72
Traveller accommodation	<10	25	Insf. Data	0	(0)	19	3.47
Recreational vehicle (RV) parks and recreational camps	0	0	0	0	0	0	0.00
Special food services	<10	<10	Insf. Data	0	1	(2)	0.93
Drinking places (alcoholic beverages)	<10	<10	Insf. Data	0	(1)	1	3.16
Full-service restaurants and limited-service eating places	0	0	0	0	0	0	0.00
TOTAL	41	65	24	2	1	21	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0000	0.0000	0.0000	0.0000
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0000	0.0000	0.0000	0.0000
School and employee bus transportation	0.0138	0.0010	0.0188	1.0336
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0000	0.0000	0.0000	0.0000
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0400	0.0016	0.0654	1.1070
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.0000	0.0000	0.0000	0.0000

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Other amusement and recreation industries	0.0000	0.0000	0.0000	0.0000
Traveller accommodation	0.0000	0.0000	0.0000	0.0000
Recreational vehicle (RV) parks and recreational camps	0.0000	0.0000	0.0000	0.0000
Special food services	0.0115	0.0008	0.0073	1.0196
Drinking places (alcoholic beverages)	0.0089	0.0006	0.0092	1.0187
Full-service restaurants and limited-service eating places	0.0000	0.0000	0.0000	0.0000

Westport

Sector	2011 Jobs	2016 Jobs	2011-2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Scheduled air transportation	0	0	0	0	0	0	0.00
Non-scheduled air transportation	0	0	0	0	0	0	0.00
Rail transportation	0	0	0	0	0	0	0.00
Deep sea, coastal and Great Lakes water transportation	0	0	0	0	0	0	0.00
Inland water transportation	0	0	0	0	0	0	0.00
Urban transit systems	0	0	0	0	0	0	0.00
Interurban and rural bus transportation	0	0	0	0	0	0	0.00
Taxi and limousine service	<10	<10	Insf. Data	0	0	(1)	1.65
School and employee bus transportation	0	0	0	0	0	0	0.00
Charter bus industry	0	0	0	0	0	0	0.00
Other transit and ground passenger transportation	0	0	0	0	0	0	0.00
Scenic and sightseeing transportation, land	0	0	0	0	(0)	0	2.23
Scenic and sightseeing transportation, water	0	0	0	0	0	0	0.00
Motion picture and video industries	0	0	0	0	0	0	0.00
Automotive equipment rental and leasing	0	0	0	0	0	0	0.00
Travel arrangement and reservation services	0	0	0	0	0	0	0.00
Performing arts companies	0	0	0	0	0	0	0.00
Spectator sports	0	0	0	0	0	0	0.00
Independent artists, writers and performers	<10	<10	Insf. Data	0	(0)	1	3.41
Heritage institutions	<10	<10	Insf. Data	0	0	1	5.14
Amusement parks and arcades	0	0	0	0	0	0	0.00

Sector	2011 Jobs	2016 Jobs	2011- 2016 Change	Nat'l Growth Effect	Ind'l Mix Effect	Comp. Effect	Locat. Quot.
Gambling industries	0	0	0	0	0	0	0.00
Other amusement and recreation industries	<10	12	Insf. Data	1	1	0	1.84
Traveller accommodation	41	46	5	2	(1)	3	6.35
Recreational vehicle (RV) parks and recreational camps	<10	10	Insf. Data	0	0	2	13.89
Special food services	0	0	0	0	0	0	0.00
Drinking places (alcoholic beverages)	<10	<10	Insf. Data	0	(0)	0	1.60
Full-service restaurants and limited-service eating places	29	21	(8)	2	3	(13)	0.58
TOTAL	105	108	3	6	2	(5)	N/A

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Non-scheduled air transportation	0.0000	0.0000	0.0000	0.0000
Rail transportation	0.0000	0.0000	0.0000	0.0000
Deep sea, coastal and Great Lakes water transportation	0.0000	0.0000	0.0000	0.0000
Inland water transportation	0.0000	0.0000	0.0000	0.0000
Urban transit systems	0.0000	0.0000	0.0000	0.0000
Interurban and rural bus transportation	0.0000	0.0000	0.0000	0.0000
Taxi and limousine service	0.0064	0.0001	0.0152	1.0217
School and employee bus transportation	0.0000	0.0000	0.0000	0.0000
Charter bus industry	0.0000	0.0000	0.0000	0.0000
Other transit and ground passenger transportation	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, land	0.0000	0.0000	0.0000	0.0000
Scenic and sightseeing transportation, water	0.0000	0.0000	0.0000	0.0000
Motion picture and video industries	0.0000	0.0000	0.0000	0.0000
Automotive equipment rental and leasing	0.0000	0.0000	0.0000	0.0000
Travel arrangement and reservation services	0.0000	0.0000	0.0000	0.0000
Performing arts companies	0.0000	0.0000	0.0000	0.0000
Spectator sports	0.0000	0.0000	0.0000	0.0000
Independent artists, writers and performers	0.0000	0.0000	0.0000	0.0000
Heritage institutions	0.0554	0.0013	0.0384	1.0951
Amusement parks and arcades	0.0000	0.0000	0.0000	0.0000
Gambling industries	0.0000	0.0000	0.0000	0.0000
Other amusement and recreation	0.0576	0.0014	0.0335	1.0925

Sector	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
industries				
Traveller accommodation	0.0125	0.0002	0.0118	1.0245
Recreational vehicle (RV) parks and recreational camps	0.0075	0.0001	0.0217	1.0293
Special food services	0.0000	0.0000	0.0000	0.0000
Drinking places (alcoholic beverages)	0.0230	0.0005	0.0209	1.0443
Full-service restaurants and limited-service eating places	0.0300	0.0006	0.0182	1.0489

APPENDIX D: ACKNOWLEDGEMENTS

The Rideau Heritage Route Tourism Association would like to thank the following individuals for their contributions to this study:

Rachel Alexander, CC's on the Rideau

Glenn Allen, Rideau Heritage Route Tourism Association

Richard Allen, Frontenac County

Joe Baptista, Township of Leeds and the 1000 Islands

John Barker, Seeley's Bay

Jim Bertram, Municipality of North Grenville

Dave Burt, Green Valley Cottages

Jan Burt, Green Valley Cottages

Dave Brown, Brown's Marina and Chaffey's Lock

Jeannie Brummit, Perth Outfitters

Scott Cameron, Rideau Ferry Regatta

Marlaine Campeau, Cranberry Lake Cottages

Rob Campeau, Cranberry Lakes Cottages

Ingrid Bron, Town of Smiths Falls

Cheryl Brown, Le Boat

Janet Campbell, Mrs. McGarrigle's Fine Food Shop

Katharine Coleman, Station Theatre

Elizabeth Collinson, Merrickville Lion's Club

Seamus Cowan, The Cove Country Inn and Spa

Amber Coville, Valley Heartlands Community Futures Development Corporation

Heather Currie-Whiting, Smiths Falls & District Chamber of Commerce

Ken Davies, Logistics Development

Teri Devine, Municipality of North Grenville

John Duncan, Hotel Kenney

Dave Dunn, Rideau Woodland Ramble

Mike Dwyer, Township of Rideau Lakes

Brian Earl, Dickinson Square

John Festarini, Parks Canada

Max Finkelstein, Have Paddle Will Travel

Steve Flewitt, Rideau King Boat Cruise

Anne-Marie Forcier, Amplitude Tourism Consulting

Marion Fuller, Round Table Events

Phil Gerrard, Municipality of North Grenville

Matt Gilmer, Municipality of North Grenville

Kurt Greaves, Lanark County

Cindy Halcrow, Township of Drummond/North Elmsley

Sharon Harvey, Upper Canada District School Board

Heather Heins, Big Rideau Lake Boat Rentals

Ron Holman, Township of Rideau Lakes

George Horton, Township of Leeds and the 1000 Islands

Robin Jones, Village of Westport

John Keane, LA Group

Annie Laurie, Parks Canada

John LeVatte, Parks Canada

Hunter McGill, Friends of the Rideau

Fiona McKean, The Opinicon

Cailie McNeill, LA Group

Catherine Moir, Rideau Heritage Route Tourism Association

Malcolm Morris, Town of Smiths Falls

Wayne Orr, Township of South Frontenac

Shawn Pankow, Town of Smiths Falls

Ian Pearson, Perth Outfitters

Brett Ramsey, Pirate Cove Marina

John Regan, Village of Merrickville-Wolford

Norm Roberts, Township of South Frontenac

Don Robine, Rideau Runner

Don Ross, Frontenac Arch Biosphere

Gerald Schwinghamer, Village of Westport

Christine Showler, Frontenac Outfitters

Larry Showler, Frontenac Outfitters

Anne Shropshire, Railway Museum of Eastern Ontario

Jordan Sinclair, Tweed Inc.

Ron Sleeth, Township of South Frontenac

Peggy Smyth, Watson's Mill

Paul Snider, Village of Westport

Jane Stoller, Sunny Acres Resort and Marina

Rita Stoller, Sunny Acres Resort and Marina

Walter Stoller, Sunny Acres Resort and Marina

Doug Struthers, Rideau Corridor Landscape Strategy

Nicola Thomson, Town of Smiths Falls

Barb Tobin, Municipality of North Grenville

Amy Webb, Township of Leeds and the 1000 Islands



Ann Weir, United Counties of Leeds and Grenville

Marie White, Lanark County

Mary Whitney, Seeley's Bay

Melanie Young, CC's on the Rideau

Mike Zaversnake, 1840 Guesthouse

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