

May 2008

City of Kawartha Lakes

PREMIER- RANKED

Tourist Destinations Project
FINAL REPORT



www.explorekawarthalakes.com

Working together.
Growing our tourist destination.



The Corporation of the
City of Kawartha Lakes

Economic Development
180 Kent Street West
Lindsay, Ontario K9V 2Y6
Tel: (705) 324-9411 ext 233
Toll Free: 1-866-397-6673
Fax: (705) 324-4965

mcunningham@city.kawarthalakes.on.ca
www.explorekawarthalakes.com

Margaret P. Cunningham
Tourism Development Officer

Attention: City of Kawartha Lakes Tourism Partner

In the attached document, you will find a Strategic Tourism Plan for City of Kawartha Lakes as prepared by Jill Vandal of the Tourism Company as well as the Premier-ranked Tourist Destinations Project Final Report. The content of this Final Report was the background for the development and research for the Strategic Tourism Plan.

In her report, consultant Jill Vandal of the Tourism Company identifies 28 recommendations and indicates three highest priorities for the City of Kawartha Lakes in the short term:

- Nurturing of a shared commitment and actions to protect, improve and enhance quality of water and adjacent lands and area lakes, rivers and waterways;
- Development and implementation of a three year tourism marketing strategy to shift from generic messaging to market-specific messaging and tactics with the updating and maintenance of a dedicated comprehensive tourism website as a critical element of that strategy; and
- Renewed commitment and investment into quality, appearance, cleanliness and infrastructure of communities.

In addition to these identified priorities, the Department intends to proceed with the following specific initiatives within the next 18 months:

- Adopt narrow and strategic marketing tactics, through the development of a rolling 3-year Marketing Plan
- Update and manage a dedicated website for Tourism
- Develop and implement an event strategy, including the creation of a Special Events Taskforce
- Renew focus on a City-wide "Culture of Tourism"

As stated by the consultant, it should be noted that "to be successful, the initiatives and recommendations identified in the Strategic Tourism Plan must be embraced by all parties that invest in and benefit from tourism including Municipal Council, Municipal staff (tourism, economic development, planning, public works, parks and recreation and others as appropriate) as well as public and private sector tourism operators of all sizes."

As the findings are shared, the Tourism Office and Tourism Advisory Board hope to garner support for the recommendations and observations revealed throughout the project.

Working together, we will grow our tourist destination, one step at a time. We look forward to the journey!

***A Strategic Tourism Plan
for
City of Kawartha Lakes***



Developed by the industry under the guidance of



And with financial support from
Investment and Development Office, Ontario Ministry of Tourism

***February 2008
(revised)***



February 2008

Ms. Margaret Cunningham,
Tourism Development Officer, City of Kawartha Lakes
180 Kent Street West,
Lindsay ON K9V 2Y6

Dear Ms. Cunningham,

I am pleased to submit a ***Strategic Tourism Plan for City of Kawartha Lakes*** that is based on the findings and conclusions from the Premier-ranked Tourist Destination Framework.

The City of Kawartha Lakes faces both opportunities and challenges. This document provides a framework and five year strategy to improve and advance the tourism sector in the City of Kawartha Lakes. Highest priority recommendations are a balance of shorter term marketing initiatives and longer term development initiatives to ensure sensitive development and a sustainable tourism sector.

Thank you to you and your colleagues for the opportunity to work with you on this important initiative. We look forward to hearing of the successful implementation of this strategy.

Respectfully submitted,

A handwritten signature in black ink that reads "N. Jill Vandal". The signature is written in a cursive, flowing style.

N. Jill Vandal
Partner
the Tourism Company

146 Laird Drive, Suite 201, Toronto, Ontario, Canada M4G 3V7
■ (416) 696 2182 ☎ (416) 696 5115

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A Strategic Tourism Plan for City of Kawartha Lakes

Introduction

The City of Kawartha Lakes (CKL) stretches from Pontypool in the south to Kinmount in the north and is home to 105 kilometers of waterway and six lock stations, a significant portion of the Trent-Severn Waterway. Visitors are attracted to its mix of urban centres (Lindsay, Bobcaygeon and Fenelon Falls), many quaint communities, trails, waterways and a lively arts and culture community. Tourism is noted as one of the strategic thrusts in the recently completed Economic Development Mission with particular focus on opportunities to align/support agri-tourism in the region.

In order to evaluate its current competitiveness and to examine its tourism development needs, the CKL tourism industry and its key stakeholders initiated the Premier-ranked Tourism Destination Framework (PrTDF) project in early 2007. Developed by the Ontario Ministry of Tourism, the PrTDF process is an intense one that follows a detailed step by step inventory, analysis and resource audit of tourism industry assets to identify gaps and opportunities. Analysis and conclusions address the three dimensions of the PrTD Framework – Product, Performance and Futurity – using eleven (11) separate criteria as presented on the next page. This strategy document builds from the conclusions derived from the data and analysis which, along with worksheets and the detailed inventory is presented under separate cover and available from CKL.

This Strategic Tourism Plan identifies priorities to address longer term tourism development needs and the key findings from the detailed PrTDF analysis. It provides a blueprint for improvement and change, including priorities that require immediate attention. It integrates the discussions and input from sessions with the PrTDF Steering Committee and industry meetings held in early December 2007 with a broad cross-section of tourism industry leaders, influencers and stakeholders.

This Strategic Tourism Plan should be treated as a living document, subject to shifts and updating as implementation of initiatives identified in this plan continue and market conditions change. Similar to the PrTDF process, this Plan takes a holistic approach to developing and supporting tourism. In addition, it is important to note that by their very nature, strategies provide a high level focus and direction, rather than specific actions and tactics. The development of a detailed work plan to implement the Strategy is the first task to be undertaken by key partners and stakeholders.

To be successful, the initiatives and recommendations identified in the Strategic Tourism Plan must be embraced by all parties that invest in and benefit from tourism including Municipal Council, Municipal staff (tourism, economic development, planning, public works, parks and recreation and others as appropriate) as well as public and private sector tourism operators of all sizes.

Premier-ranked Tourist Destination Framework Dimensions and Criteria	
<p>PRODUCT</p> <p><i>“Features that enable a destination to offer a high quality tourist experience”.</i></p>	<ul style="list-style-type: none"> ✓ Distinctive Core Attractions What makes the destination stand out as distinct? How is the destination offering relevant to market wants? ✓ Quality and Critical Mass To what extent does the destination provide a broad and deep range of core and related activities, as well as entertainment, shopping and dining? ✓ Satisfaction and Value Do guests feel welcomed, are they satisfied, do they receive good value? What is being done to enhance these areas? ✓ Accessibility How accessible is the destination to tourists and how well is access being managed? ✓ Accommodations Base What range of accommodation classes, price points and locations is available?
<p>PERFORMANCE</p> <p><i>“The extent to which the destination is successful and recognized in the market place”.</i></p>	<ul style="list-style-type: none"> ✓ Visitation Examines total visitation and market share, market segments it attracts and seasonality of visits. ✓ Occupancy and Yield What is the destination’s occupancy and spending relative to provincial averages and norms? ✓ Critical Acclaim Is the destination recognized as standing out from other competitive destinations? Is it a ‘must see’ destination?
<p>FUTURITY</p> <p><i>“Is the destination investing in its future as a place with viable and continuing attractiveness for evolving markets”</i></p>	<ul style="list-style-type: none"> ✓ Destination Marketing Is the destination targeting viable markets, investing in managing and promoting tourism and working with tour operators serving the area? ✓ Product Renewal Is the destination making capital investment into its attractiveness for the future? ✓ Managing within Carrying Capacity Does the destination have the ability to manage systems that sustain it, (e.g. soft and hard, infrastructure, ecosystems administrative systems) and its attractiveness to the tourism marketplace?
<p>Source: Ontario Ministry of Tourism <i>Premier-ranked Tourist Destination Framework</i> , 2001</p>	

Highlights of the PRTDF Analysis and Conclusions

Key Attractors

CKL is defined, in large part, by its navigable lakes and waterways, with a significant portion of the Trent-Severn Waterway (TSW) located in the area. Therefore, CKL's main attractors are dominated by outdoors activities which are primarily seasonal (May to September) and include:

- Navigable waterways, predominately the Trent-Severn Waterway (waterway, lock stations and land-based features) as well as lakes and rivers linked to the TSW system;
- Long standing agricultural fairs;
- Seasonal recreational properties/urban escapes such as private cottages, seasonal campsites and provincial parks to access outdoors pursuits and nature; and
- Organized special interest recreational pursuits including fishing tournaments.

A number of other attractions, which are available year round, include:

- 'Authentic Ontario rural experiences', animated by a range of agri-tourism offers, festivals and events, specialty retail, attractions, museums, dining, etc. This encompasses destination retail (Bigley Shoes, Kawartha Trading Post) and live entertainment such as concerts, performing arts, dinner theatres.
- A series of four season trail systems for hiking, cycling, ATVing, snowmobiling etc. including Victoria Rail Trail and portions of each of the Trans-Canada Trail and the Ganaraska Trail.
- Parks and natural areas. The addition of Queen Elizabeth II Wildlands Provincial Park is a significant opportunity.

What does tourism in the City of Kawartha Lakes look like?

Total # of visits: 1.05 million

Total spending: \$66.9 million generating over \$1 million in Municipal tax revenue

Same day vs. Overnight: 44% same day; 56% overnight

Origin of overnight visitors: 93% Ontario, 4.3% U.S., 2% other provinces and 1% overseas

Travel Party Profile: 77% adult only parties.

Market segments for overnight visits: Pleasure - 69%; Visiting Friends and Relatives (VFR) - 27%, Business- less than 0.1%.

Seasonality of all visits: 29% January to March; 23% April to June; 27.5% July to September; 25% October to December.

Source: CTS/ITS 2004 most recent available

CKL also has attractions with appeal to special interest markets including:

- Fleming College, Frost Campus for its School of Environmental and Natural Resources Sciences, and related specialty centres as well as one of the most environmentally sustainable commercial buildings in Canada;
- Carden Alvar, a designated Important Bird Area (IBA).

Both of these unique facilities draw different and rather narrow market niches, some regional, others international.

Tourism in the City of Kawartha Lakes is supported by area communities in different degrees including:

- Staging and marketing of community and local festivals and events;
- Operation of visitor information centres;
- Providing customer service training;
- Public investment into tourism services and amenities such as development and maintenance of public spaces, parks and washrooms, transportation facilities and signage; and
- Active participation and representation on such regional initiatives that impact tourism including “*A Prosperity Plan for Eastern Ontario*” and “*Panel on the Future of the Trent-Severn Waterway*”.

As with many communities, the geographic scope and mix of attractors throughout the region may not be fully understood by visitors or residents. This lack of awareness limits the ability of hosts and front-line staff, in particular, to extend stay and to move visitors throughout area by suggesting options.

Accommodations Inventory

The commercial accommodations inventory in CKL is dominated by seasonal campgrounds, trailer parks and housekeeping cottages serving long-time repeat, seasonal and lower yield customers. While there is an absence of any nationally branded hotel/motel properties, there are a range of options that include character inns, resorts and B&Bs that serve independent travellers and small groups. A critical mass of houseboat rental offers adds an element of uniqueness and character to the accommodation inventory. This accommodation inventory is, not surprisingly, clustered around urban areas and along waterways/lakes. Average annual occupancy rates fall between 50% and 65%, below PRTDF benchmark

In 2004, overnight visitors stayed in the following:

- 14% roofed commercial lodgings,
- 28% in campgrounds/trailer parks, and
- 55% in private homes or private cottages.

Source: CTS/ITS 2004 most recent available

of 65%.

The review of the accommodation inventory notes the following characteristics:

- The limited per property capacity at existing commercial accommodations means that CKL is not often in a position to serve or host large groups, events and meetings and conventions, unless a creative solution to pooling and selling accommodation jointly is pursued.
- The current patterns of average occupancies suggest there is opportunity to serve more overnight visitors, particularly in non-summer season.
- As long-held campgrounds and family-operated housekeeping resorts change hands, it is possible that there will be some shifts in mix of tourism accommodation capacity, with some changing to residential developments and others to new tourism-related developments.
- Marinas are dominated by seasonal slips with only 20% available to transient boaters.

Visitor Profile

Visitation to CKL draws heavily from within 2 to 3 hour drive, reflecting the area's draw as a camping and cottage destination for Ontario residents. Over 65% of overnight visitors engage in some kind of outdoors activity, 64% are visiting friends and relatives, 42% shop and 39% sightsee.

The 2004 yield per visitor, or how much they spend while in CKL, is very low when compared to provincial averages - \$34 per person for overnight visitors to CKL compared to the provincial average of \$270.27. This spending level reflects high cottage and campground use, as well as a sizable visiting friends and relative market. These visitors spend less than other sectors as they cook at home rather than eat out at restaurants and enjoy their seasonal residence, rather than pay for commercial accommodation.

Investing for the Future

According to surveys completed for the inventory, a total of \$7.8 million has been invested across all sectors in the last 5 years with \$4.1m or 53% of that in the last 2 years. Of the 67 reporting investments 14 were for less than \$10,000 and 28 for between \$10,000 and \$50,000. Significant private sector investments (over \$700,000 each) into upgrades and expansions rather than new have been made at Admiral Inn, Academy Theatre, Garry's Garden and Devil's Elbow. Municipal investments focus on parks and trails.

Investor inquiries are increasing from the private sector including developers and the new immigrant investors program with interest highest around TSW hubs. While this interest is exciting for the City, it must also be managed and monitored for its impact on infrastructure and on existing tourism offers.

In addition to shifts in investment and the potential for new development, recent and projected increases in year-round residents (up 7.8% between 2001 and 2006) will also have an impact in the future. A larger year round community will play a role in supporting theatres, restaurants and events for example, but may also create challenges for infrastructure and affordability. This increase in year-round residents will also increase the opportunity to attract more visiting friends and relatives (VFR).

Strategic Priorities

The recommended strategic approach for tourism in CKL addresses product first, marketing of the product second, and development of a skilled and engaged tourism sector supported by the community at large, third.

The focus on product first addresses the protection of existing tourism attractors as well as the development of new. It also acknowledges the long term potential of the destination with significant new investment and development a very real possibility. Recommendations for marketing address the reality that resources are limited and therefore need to be narrowed and focused. In addition, increased use of the Internet as a marketing medium is required to be more efficient and effective. Investments into strengthening the foundation for a vibrant tourism destination include an engaged and skilled tourism sector as well as informed staff and politicians.

The recommendations outlined on the following pages touch the three major dimensions of the Premier-ranked Framework (Product, Performance and Futurity) as well as a definition of marketing that includes research and planning, product development, communications and sales.

Recommended priorities for The City of Kawartha Lakes to develop a vibrant and sustainable tourism destination follow:

1. Protect and enhance existing core attractors to retain existing visitation, attract new visitors and increase average spending;
2. Develop new tourism products and experiences to increase total visitation to the City of Kawartha Lakes and to build destination loyalty;
3. Adopt narrowed and strategic tourism marketing;
4. Market existing market-ready offers in new ways;
5. Supporting the on-going development of an engaged, skilled and 'connected' tourism sector across the City of Kawartha Lakes; and
6. Actively nurture a shared 'culture of tourism' throughout the City of Kawartha Lakes;

Recommended initiatives to address the strategic priorities are outlined in the next few pages.

1. Protect and enhance existing core attractors

The active protection and enhancement of core attractors in the City of Kawartha Lakes will play a significant role in retaining existing visitation, attracting new visitors and in increasing overall spending or yield. Protection and enhancement includes the core attractors themselves as well as the infrastructure and support of the communities in which they are located.

STRATEGIC ACTIONS/RESPONSES	IMPLEMENTATION CONSIDERATIONS
<p>1. Nurture shared commitment and actions to protect, improve and enhance the quality of water and adjacent lands of area lakes, rivers and waterways, including the Trent-Severn Waterway.</p>	<p>This is a shared and ongoing investment of time and resources at business, political, staff and official levels to continue to be active, in partnership with Parks Canada, Ministries of Environment, Natural Resources and others in protecting and enhancing area waterways. Private citizens and tourism operators must also take an active role. This active role can be encouraged in the tourism sector by the development, adoption and application of a ‘personal code of operations’ that guides daily operations along the waterways. The intention of this ‘personal code of operations’ is to show commitment through daily actions, rather than being prescriptive. In this way, everyone takes responsibility to contribute to the sustainability of CKL’s most significant tourism asset. The tourism sector must also actively support CKL’s contribution to the <i>Panel on the Future of the Trent-Severn Waterway</i>.</p>
<p>2. Encourage and actively seek public and private sector investment into quality, appearance, cleanliness and infrastructure of all communities and in particular the larger rural centres of Bobcaygeon, Fenelon Falls and Lindsay that receive the largest tourist activity and visitation.</p>	<p>This is another shared initiative where each community must play a role in keeping public spaces and properties clean and attractive. These efforts signal that communities are welcoming to visitors and are ready and open for their business. Ongoing investment is also required for such infrastructure as way-finding signage, public washrooms accessible outside the summer season, timely and regular garbage disposal, designated parking for cars, motor coaches and RVs and accessible visitor information outlets/centres.</p>

<p>3. Encourage and actively seek public and private sector investment into tourism demand generators such as:</p> <ul style="list-style-type: none">a. indoor and outdoor arts/culture facilities and live entertainment venues; andb. high quality trails facilities and infrastructure to support sustainable four season tourism opportunity.	<p>Arts and culture venues support and facilitate year round arts and culture activities, which result in arts and culture offers that motivate or add to visits to the area. Trails that are maintained and accessible have played a role in generating year round visits and can in the future with ongoing investment and development. In addition to such investments, there is also a need for on-going programming and packaging of these assets and activities to fully leverage the opportunity.</p>
<p>4. Develop and implement an events strategy for CKL to:</p> <ul style="list-style-type: none">a. Facilitate and encourage refreshment of existing events to retain existing visitation and attract new.b. Present a coordinated tourism events calendar that minimizes conflicting dates and provides coordinated marketing opportunities.c. Facilitate mentoring between new and established festival and event organizers.d. Leverage indoor and outdoor facilities (Fleming College, Lakeview Arts Barn, Lindsay Fair Grounds, Academy Theatre, for example) as both events venues and as events infrastructure.	<p>The development of an events strategy, that encompasses all events-related recommendations, should be shared by an Events Task Force or Committee made up of CKL staff, representatives of TAB and event organizers. In addition to more detailed planning, this group can champion and be the voice of events-related initiatives.</p>
<p>5. Address transportation and access issues that impact tourism which currently include:</p> <ul style="list-style-type: none">a. gaps and challenges for transportation to and from GTA and other major urban centres as well as inter-community through CKL;b. access by transient boaters to land-based retail, restaurants, theatres etc, beyond those adjacent to waterways.	<p>The 2007 <i>Prosperity Plan for Eastern Ontario</i> discusses and highlights the need for a regional transportation master plan for Eastern Ontario. This master plan would address the integration of the 400 series highways, expansion of Highway 7 as well as integration of waterways, rail lines and airports to enhance transportation. The tourism sector must be represented in these discussions.</p> <p>A review and amendment of municipal by-laws and other initiatives to support such options as bike rentals at docks and marinas, shuttle services at peak times or events will help in supporting the movement of transient boaters further into and through communities.</p>

2. Develop new tourism products and experiences

The development and marketing of new tourism products and experiences, particularly at each end of the peak summer season will ensure that visitors have compelling reasons to visit and re-visit the waterways, communities, rural areas and attractions throughout CKL. A range of tourism offers will also build 'destination loyalty'.

STRATEGIC ACTIONS/RESPONSES	IMPLEMENTATION CONSIDERATIONS
<p>6. Generate incremental visits in non-summer season by:</p> <ol style="list-style-type: none"> a. developing a critical mass of 'signature CKL' overnight leisure packages that link established quality accommodation providers with performing arts venues, restaurants, specialty retail, trails venues, festivals/events; first priority time is shoulder seasons of May/early June and September, followed by mid-winter season. b. working with market-ready operators to offer time-limited offers during long weekends and school-breaks. 	<p>The first priority is to target and work with operators who are already in a position to offer market-ready, high quality experiences to extend visitation beyond the peak summer season. These new themed offers (signature CKL overnight leisure packages and school break getaways) should then be marketed as a collective via the Internet by CKL to the appropriate segment(s) to facilitate sales.</p>
<p>7. Establish and market two new CKL wide events with general interest to generate new overnight visitation -one in winter and one in early summer.</p>	<p>Existing community-based events may be appropriate for expansion into an event with a tourism draw. Another approach is the development of a sector-specific event that happens only in CKL.</p>
<p>8. Manage new tourism development and new year round and seasonal recreational residential development with sensitivity to and integration with existing tourism inventory by monitoring impact on existing offers/capacity to:</p> <ul style="list-style-type: none"> • identify new opportunities, • understand impact on ability to effectively service visitors; and • address any infrastructure needs. 	<p>Effective integration requires on-going and close cooperation and discussions between municipal planning, tourism and economic development staff and officials. As some land use changes from tourism to residential, the overall CKL capacity, price and character of offers may be significantly different than current inventory, which in turn may require new and different marketing messages.</p>

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9. Integrate new, refreshed and planned tourist attractions, events and packages into established tourism marketing, networks and activities to encourage new partnerships and offers.

The PrTDF process identified a number of newly completed, planned and projected capital investments, both tourism and non-tourism. In addition the Management Plan for the newly designated Queen Elizabeth II Wildlands Provincial Park provides significant opportunities over the longer term. Owners and managers of these initiatives will benefit from active integration into the broader tourism industry to inform others on new product/experience offered, explore partnership opportunities, share profile of customers/visitors and identify peak capacity and times of need.

3. Adopt narrow and strategic marketing

No community can be all things to all visitors. The most successful jurisdictions use messaging that focuses on specific visitor origin markets and/or segments. It is also important that CKL market what it can service and sell, rather than under-selling or over-selling.

STRATEGIC ACTIONS/RESPONSES	IMPLEMENTATION CONSIDERATIONS
10. Shift tourism marketing tactics from generic destination messaging to market-specific messaging, images, mediums and tactics. Support this shift by developing and implement a rolling three-year tourism marketing strategy for CKL.	A longer term perspective with a clear focus on fewer and narrower segments will play a role in increasing effectiveness of limited marketing resources.
11. Capitalize on existing City image of “Catch the Kawartha Spirit” for use in tourism marketing and positioning.	While the city logo may be closely associated with the corporation by residents, the phrase ‘Catch the Kawartha Spirit’ lends itself to use in the tourism sectors. This phrase can act as the umbrella or tag line that ties all tourism-related messaging together internally as well as externally.
12. Update and maintain dedicated comprehensive consumer tourism website.	A well-designed and visitor friendly website will augment and in some cases replace traditional marketing. It can act as the primary method to target niche markets. The on-line strategy should include the use of segmented e-newsletters that highlight buyable tourism experiences and products, be optimized for search engines and facilitate posting of user-generated content. Utilize new segmentation research from OTMPC to further refine Internet marketing.
13. Realign community guides to develop consolidated visitor guide with relevant content and focus.	These guide(s) would replace the diverse number of smaller guides that create confusion for the visitor and challenges the limited marketing resources of many tourism operations. The approach should include and highlight linkages across communities, and may take a broader activities/theme approach, responding to visitor interests. Conversations with private sector publishers should be included at appropriate stages to explore opportunities to work together on comprehensive guides.

14. Use media relations to support positioning of CKL as top-of-mind destination for rural getaways, agricultural fairs, range of trails, navigable waterways, fishing, and four-season outdoors in Greater Toronto Area (GTA) and along the 401 corridor.

Strategic use of media relations will support the launch of such initiatives as signature CKL and school break packages. In addition, media relations can also:

- actively showcase tourism providers and experiences that receive critical acclaim;
- showcase 'lesser-known' communities, events and hidden gems to create intrigue, interest and visits;
- highlight authentic rural offers of interest to urban dwellers including studio tours, wine and food festivals, farm markets, farm fresh tours, destination retail and Windows on Main Street; and
- highlight accessible, affordable and quality arts offers.

An effective media relations program requires development of storylines, images and contacts for both on-line and traditional media.

15. Actively partner to extend marketing reach and to access new audiences.

Continue presence and partnering with appropriate regional and Provincial partners such as Getaway Country, Peterborough and the Kawarthas, Ontario Tourism Marketing Partnership (OTMPC), etc. In addition, seek ways to engage and involve a variety of traditional and non-traditional partners in strategic initiatives to leverage 'The Kawarthas' cachet and identity.

4. Market existing market-ready tourism offers in new ways

The City of Kawartha Lakes has a number of offers that when combined or highlighted in a different way, can reach a new audience.

STRATEGIC ACTIONS/RESPONSES	IMPLEMENTATION CONSIDERATIONS
16. Focus some regional marketing activities on building visitation from small group markets to match capacity, including small group/business retreats, family reunions/events and groups with shared passions, such as trails or birding groups.	This focus on the small group sector will require cooperation from those operators interested in serving these markets and a detailed understanding of how to effectively reach them.
17. Attract larger groups by positioning existing accommodation capacity to attract overnight visitation in non-peak season.	Work with accommodations providers to develop creative solutions for serving larger groups in non-peak seasons. For example, how can housekeeping resorts, houseboats, campgrounds, resorts and hotels collectively work together to provide capacity so that CKL can effectively serve tournaments and events year round? Start slowly to test ability to service large groups this way.
18. Launch organized and collaborative marketing of general interest events. Further extend draw by linking events to accommodations offers during events.	The Internet facilitates selling and tracking of time-sensitive offers built around events.
19. Showcase existing tourism offers in new ways and in new combinations.	Examples of this approach include showcasing offers via geo-caching or by linking attractors along shared waterways beyond CKL boundaries (TSW, Scugog River, etc.). It will be important to link these offers to overnight accommodation whenever possible to generate higher yield overnight stays. This approach will also play a role in reaching longer haul markets by appealing to specific interests and can be led by the private sector.
20. Increase the number of tourism ambassadors for CKL by inspiring a pride of place and increasing the knowledge of the CKL offer of decision-makers and influencers for industrial, business, social and academic events, meetings and activities.	Encourage non-tourism stakeholders to use tourism as a core message. For example, Fleming College can highlight tourism offers throughout the region when hosting technical events, conferences and meetings. While ongoing networking across the tourism industry will facilitate this, it will also require distribution of existing information through new mediums and to new audiences.

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| <p>21. Strategically pursue organized events/tournaments (trails-based races, tournaments and technical events) that will be attracted to core CKL attractors such as four season trails, waterways, municipal recreation facilities, etc.</p> | <p>This strategy requires adoption of a 'destination sell' and the adoption of the strategy noted above, to position existing accommodation with capacity to serve larger groups.</p> |
| <p>22. Position CKL as a destination for pre-event and post-event activities as well as event venues for tournaments and events held in adjacent regions.</p> | <p>Focus efforts on working with host location event organizers in the broader region that attract visitors who are seeking four season trails, accessible waterways and other features where CKL has competitive advantage.</p> |
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5. Support the on-going development of an engaged, skilled and ‘connected’ tourism sector across CKL.

An engaged, skilled and connected tourism sector is a critical pre-requisite for a sustainable tourism destination. For CKL this means that each of the major centres in particular will have to continue to work at building relationships and understanding across geo-political boundaries.

STRATEGIC ACTIONS/RESPONSES	IMPLEMENTATION CONSIDERATIONS
<p>23. Continue to host regular tourism training and networking events across CKL to:</p> <ul style="list-style-type: none"> • expose other tourism operators to the range of venues and offers; • facilitate sharing of opportunities; • increase understanding of visitor expectations; • educate and engage on new type of visitor groups, such as recent immigrants; and • educate and inform about new and emerging research. 	<p>Work with the tourism sector to confirm highest interest and need. Host at times and locations that motivate participation. Broaden participation to include non-traditional partners to further extend reach and to build relationships to assist in extending the sales force for CKL beyond the traditional tourism sector.</p>
<p>24. Support training of the tourism sector to be in a position to take advantage of booking, selling and marketing capability that high speed Internet will provide once fully established across CKL.</p>	<p><i>Tourism Keys</i> is a workshop and training series that trains tourism operators on how to effectively use the Internet. The tourism sector in CKL will benefit from this and other similar courses as high speed Internet infrastructure becomes available.</p>

6. Actively nurture a shared ‘culture of tourism’ throughout the City of Kawartha Lakes.

There are three areas of focus in nurturing and extending a shared culture of tourism -- municipal politicians and staff, operators who may not be actively engaged year round and the general public.

STRATEGIC ACTIONS/RESPONSES	IMPLEMENTATION CONSIDERATIONS
<p>25. Actively inform, educate and engage municipal politicians and staff on the benefits and impact of tourism on overall community and economic health in order to build support and integration to overall municipal planning.</p>	<p>Utilize “Making the Case for Tourism” tool provided by Investment and Development Office, Ministry of Tourism as a guide on how to engage municipal politicians, residents and the broader business community. The tourism industry in CKL must continue to be proactive to ensure that the tourism mindset and interests are on relevant municipal political and staff ‘agendas’ covering such areas as planning, operations that are sensitive to and supportive of peak tourism visitation, traffic, signage, roads, heritage designations, etc. This initiative requires a continued investment of time and energy in both a formal and informal manner.</p>
<p>26. Increase understanding of year round and seasonal residents who act as hosts, as well as front-line tourism staff throughout CKL to develop broader destination sell.</p>	<p>A pilot ‘knowledgeable host’ program is currently under development in Durham Region as tool to increase front-line understanding of tourism offer. It is anticipated that this program will be easily transferable once customized for CKL with minimal effort.</p>
<p>27. Stabilize investment environment by formally adopting the CKL Official Plan Update.</p>	<p>The CKL Official Plan update notes in Section 3.1.10 the role and importance of the tourism sector to the City. The formal adoption of this O.P. Update will add stability to the investment environment as well as provide clear direction and mandate for staff.</p>
<p>28. Work with retail, food & beverage and other sectors to increase their understanding of the opportunity provided by events and visitation outside traditional summer season in order for them to customize their offer and to be open during high visitation periods.</p>	<p>This initiative is more ad-hoc in nature and is most appropriate around specific opportunities. It will be most effective linking industry to industry on a one to one basis between for example event organizers and storefront locations to ensure individual concerns and questions are addressed.</p>

Implementing the Tourism Development Strategy

The implementation of the Strategic Tourism Plan for the City of Kawartha Lakes must be a shared effort between a number of parties including Municipal Council, management and staff of the City, the Tourism Advisory Board, other tourism organizations, individual tourism operators as well as industry task forces and committees. As noted previously, the Strategy should be treated as a living document, with recommendations continually assessed and refined to respond to the on-going development of the tourism industry in CKL and broader market conditions. As a result, some initiatives may be added while others are adjusted as time passes.

Resourcing the Strategy

Implementation of the Strategy requires support and investment at many levels and in many forms, including, for example:

- new and/or redirected financial resources to implement some elements of the Strategy;
- time from front-line industry to be active on Tourism Advisory Board, Committees and Task Forces that further shape and define some initiatives as well as acting as champions;
- a shift in approach or thinking; and
- political support at all levels for financial and practical resources (meeting rooms for example).

Phased Implementation of the Strategic Tourism Plan

The following charts summarize the recommendations that should be initiated in the following three time frames – in the next 18 months, within the next three to five years and on-going. While this chart suggests specific timelines, more importantly it signifies the priorities relative to each other. Some initiatives are one-time, while others require on-going investment and attention. Once implemented, many recommendations then shift to ‘on-going’. As with any strategy, implementation will be subject to available resources. In addition to recommended priorities, the chart also outlines the most logical parties to be involved in implementation.

<i>Initiative</i>	<i>Initiate within next 18 months (2008 to 2009)</i>	<i>Within three to five years</i>	<i>On-going</i>	<i>Who Implements?</i>
1. PROTECT and ENHANCE EXISTING CORE ATTRACTORS				
1. Nurture shared commitment and actions to protect, improve and enhance the quality of water and adjacent lands of area lakes, rivers and waterways including the Trent-Severn Waterway by development of 'personal code of operations'.	✓			CKL, TSW and invited members of new working group, supported by external facilitator.
2. Invest into quality, appearance and cleanliness of all communities.	✓			CKL (Parks and Recreation, Public Works, Community Services and others), area communities, Chambers of Commerce, private sector
3. Encourage and actively seek public and private sector investment into indoor and outdoor arts, culture and entertainment venues as well as high quality trails facilities and infrastructure.			✓	CKL, communities, Chambers of Commerce, private sector.
4. Develop and Implement Events Strategy.	✓			Newly formed Events Task Force supported by external consultant.
5. Address transportation and access issues that impact tourism.			✓	CKL Staff and Council
2. DEVELOP NEW TOURISM PRODUCTS and SERVICES				
6. Generate incremental visits in non-summer season.	✓			CKL Tourism Office in partnership with industry and supported by product development consultant.
7. Establish and market two new CKL-wide events.		✓		Events Task Force in partnership with community at large.
8. Integrate new tourism and recreational residential development in CKL into existing tourism inventory.			✓	Staff from CKL Tourism Office, Economic Development and Municipal Planning.
9. Integrate new, refreshed and planned tourism attractors into established marketing plans and networks.			✓	CKL Tourism Development Office in partnership with industry

<i>Initiative</i>	<i>Initiate within next 18 months (2008 to 2009)</i>	<i>Within three to five years</i>	<i>On-going</i>	<i>Who Implements?</i>
3. ADOPT NARROW AND STRATEGIC MARKETING				
10. Develop and implement three year tourism marketing strategy to shift marketing from generic destination to market-specific messages and tactics.	✓			CKL Tourism staff with external consulting support.
11. Capitalize on “Catch the Kawartha Spirit” in tourism marketing and positioning.	✓			External graphic designer.
12. Update and maintain dedicated comprehensive consumer tourism website.	✓			CKL with external consulting support.
13. Realign community guidebooks to develop consolidated guidebooks.		✓		CKL staff with direction from TAB.
14. Use media relations to support positioning of CKL as top of mind destination.			✓	CKL Tourism staff.
15. Actively partner to extend marketing reach and to access new audiences.			✓	CKL Tourism staff leads.
4. MARKET EXISTING MARKET-READY TOURISM OFFERS IN NEW WAYS				
16. Build visitation in small group markets.		✓		Tourism industry facilitated by product development consultant.
17. Work with accommodations providers to develop creative solutions for serving large groups in non-peak seasons.		✓		Tourism industry with support of CKL staff.
18. Launch organized and collaborative marketing of general interest events.		✓		Events Task force and CKL Tourism staff.
19. Showcase existing tourism offers in new ways and in new combinations.	✓			Integrated into tourism strategy.
20. Increase the number of tourism ambassadors for CKL.			✓	Done in conjunction with networking events.
21. Strategically pursue organized events/tournaments.		✓		Events Task Force and CKL Tourism staff.
22. Position CKL as destination for pre-event and post-event activities to area meeting and conference organizers.		✓		Events Task force and CKL Tourism staff.

<i>Initiative</i>	<i>Initiate within next 18 months (2008 to 2009)</i>	<i>Within three to five years</i>	<i>On-going</i>	<i>Who Implements?</i>
5. SUPPORT ON-GOING DEVELOPMENT OF ENGAGED, SKILLED AND CONNECTED TOURISM SECTOR ACROSS CKL				
23. Host regular tourism networking events across CKL.			✓	CKL staff and TAB
24. Host tourism Internet marketing training workshops and opportunities.	✓			External trainers.
6. ACTIVELY NURTURE A SHARED 'CULTURE OF TOURISM' THROUGHOUT CKL				
25. Inform, educate and engage municipal politicians and staff by using "Making the Case for Tourism" toolkit.			✓	TAB
26. Implement the ihost program to educate front-line tourism staff on what there is to see and do.		✓		CKL staff and TAB
27. Formally adopt CKL Official Plan with input from the Tourism sector.	✓			CKL Council.
28. Facilitate industry to industry conversations to increase understanding and buy-in for off-season opportunities.			✓	TAB

Highest Priority Recommendations

It is recommended that CKL and its partners and stakeholders actively pursue the following recommendations in the short term:

- nurturing of a shared commitment and actions to protect, improve and enhance quality of water and adjacent lands of area lakes, rivers and waterways;
- development and implementation of a three year tourism marketing strategy to shift from generic messaging to market-specific messaging and tactics with the updating and maintenance of a dedicated comprehensive tourism website as a critical element of that strategy; and
- renewed commitment and investment into quality, appearance, cleanliness and infrastructure of communities.

Measures of Success

The City of Kawartha Lakes should monitor the following longer term indicators or measures of success to determine the impact of recommendations once implemented:

- commitment to and active participation across the industry in protecting, improving and enhancing the area's waterways and adjacent lands;
- new investment into arts, culture and trails facilities;
- increased occupancy in shoulder times of late spring and fall;
- increased per visitor spending;
- a broad range of planning decisions across communities in CKL include consideration of the impact on tourism; and
- Municipal politicians are actively engaged in tourism task forces and initiatives.

Establish Momentum

The successful implementation of this Strategy will benefit from initiating some steps quickly to establish momentum, build profile and to engage support and participation from the tourism industry. A number of first steps have been identified and include:

- review, approval and adoption of this plan by the Tourism Advisory Board;
- presentation to City Council for endorsement of the direction of this Strategic Tourism Plan;
- identification of a Tourism Plan Implementation Team to oversee, support and champion this Strategy; and
- a formal launch and announcement of the Strategy to broader industry.

The analysis of the issues and opportunities, coupled by the participation of a wide range of interested individuals across CKL in the Premier-ranked Tourist Destination Framework process and this resulting Strategic Tourism Plan has created some momentum and energy in the tourism sector and beyond. It is now up to the collective will to harness this energy to move this strategy forward to support and guide the further development of a vibrant and sustainable tourist destination in the City of Kawartha Lakes.



City of Kawartha Lakes Premier-ranked Tourist Destinations Project (PrTD)

Final Report

May 2008

Prepared by:
Premier-ranked Tourist Destinations
Project Team

in collaboration with:
City of Kawartha Lakes
Economic Development Department
180 Kent Street West, Lindsay ON K9V 2Y6
705-324-9411 ext. 233
tourism@city.kawarthalakes.on.ca

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PREMIER-RANKED TOURIST DESTINATIONS (PrTD)

Project Team

Project Team Coordinators

Eris Aneroussis	Tara Bostelmann
Glenda McElwain	Julie Chessman
Patricia Havas	

Lead by Margaret Cunningham, Tourism Development Officer

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Paul Samson - Ontario Ministry of Tourism
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Bernard Marshall – Employment Ontario
 Heather Walker – Victoria County Careers Services

Thank you to the community and tourism partners as well as the members of the Tourism Advisory Board (TAB) who acted as the Steering Committee for this project, volunteering their time and expertise. Their contribution was invaluable to the success of this project.

ACCOMMODATIONS	Catherine Kersteman	Saucy Willow Inn
	Judy Beall (TAB)	Kawartha Lakes Inn
	Bev Matthews	Trails End Cottages
	Karen Williams	Lunge Haven Cottages
FOOD & BEVERAGE	Nicki Dedes	Olympia Restaurant
MARINAS	Chris Poole	Buckeye Marine
	Tom Bath (TAB)	Centre Point Marina
	Juanita McCoy	Rosedale Marina
GOLF	Rick Johnson (TAB)	Lindsay Golf & Country Club
	Nancy Griffin (TAB)	Scotch Line Golf Club
EVENTS & FESTIVALS	Lou Probst	Carden Nature Festival
ARTS & CULTURE	James Barrett (TAB)	Lakeview Arts Barn
	Jack Kyle	Academy Theatre
TOURS & EXCURSIONS	Randy Hinton (TAB)	Kawartha Spirit
	C.J. Irwin	Bronson Productions
AGRI-TOURISM	Kathleen Holmes	Salem Alpacas
ADVENTURE OUTFITTERS	Jamie Brown	Emms Sports
ATTRACTIONS	Lisa Dever	Boyd Heritage Museum
	Sara Atkins/Nicole Austin	Trent-Severn Waterway
	Wayne Harpell (TAB)	Trent-Severn Waterway

	Jack Kyle	Academy Theatre
	Willy Campbell	Sir Sandford Fleming College
	Blane Harvey	Sir Sandford Fleming College
PARKS & TRAILS	Jeff Lytle	Balsam Lake Provincial Park
	Mark Lowell (TAB)	Log Chateau Park
	Al MacPherson	Green Trail Alliance
RETAIL	Barb Evans	Kent Florist
	Mark Knoester (TAB)	Fenelon Falls Sobey's
	Linda Peckitt (TAB)	Red Rock Antiques
		Lindsay & District Chamber of Commerce
COMMUNITY REPS	Val Harris	Lindsay & District Chamber of Commerce
	Gayle Jones (TAB)	Bobcaygeon & District Chamber of Commerce
	Tom Kupusa	Fenelon Falls & District Chamber of Commerce
	Bill Goulding	Fenelon Falls & District Chamber of Commerce
	Frank Kinzinger	Omeme Business & Community Improvement Association
	Debbie Coote	General Manager Economic Development
STAFF	Andrew Wallen (TAB)	CKL – Chief Administrative Officer
	Jane Lunn	CKL- Development Services
	Richard Danziger	CKL - Coordinator-Current Planning
	Doug Carroll	Councillor Ward 11
COUNCIL REPRESENTATION	Pat O'Reilly (TAB)	Councillor Ward 2
	Emmett Yeo (TAB)	Mayor of City of Kawartha Lakes
	Ric McGee	Kawartha This Week
MEDIA	Catherine Whitnall	

A special thanks to Jill Vandal of ^{the} Tourism Company, whose services were retained to assist in the evaluation of City of Kawartha Lakes' tourism performance, and to prepare a detailed Strategic Tourism Plan that responds to the opportunities and challenges identified through the Premier-ranked Tourist Destination Framework process.

INTRODUCTION

What is the Premier-ranked Tourist Destinations Process (PrTD)?

Premier-ranked is defined as “a place more attractive than the rest, a place the tourist should consider first when making travel plans”. The Premier-ranked Tourist Destinations Process (PrTD) was developed by the Ontario Ministry of Tourism and Recreation (MTR) in 2001 to provide a framework for tourism destinations across Ontario to define their competitive position within the tourism marketplace on domestic and international levels.

Leading tourist destinations are constantly trying to distinguish themselves in the marketplace. Some present themselves as a “Premier-ranked Tourist Destination. Others aspire to achieve that status, but are not exactly sure of what they are seeking or how they will know when they get there. Still others are more concerned with operating at the highest level within their reach than they are with any label. While wrapped in the language of “being Premier-ranked”, this project focuses on enabling the destination to “be the best it can be”.

The Ministry of Tourism and Recreation developed a resource audit and workbook format that outlines the attributes, factors, conditions that are considered prerequisites for a tourist destination to be considered a serious destination. The workbook format provides a simple methodology that communities can follow to ensure consistency, accuracy and maximum involvement of tourism and economic development stakeholders in the process. The workbook emphasis is on enabling any tourist destination of any scale to operate at the highest possible level it can achieve.

There are three specific dimensions of tourism assessment included in the study:

THE PRODUCT DIMENSION

A tourist destination provides a high quality tourist experience, enabled through the destination’s offerings of:

- Distinctive Core Attractions
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- An Accommodations Base

THE PERFORMANCE DIMENSION

The quality of the tourist experience and the destination’s success in providing it is validated by:

- Visitation
- Occupancy Yield
- Critical Acclaim

THE FUTURITY DIMENSION

The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

The process involves several critical steps along with a serious commitment and investment of time by the industry partners involved. Intended for use by tourism stakeholders in a destination area, the framework defines a self-contained analytical process. This investment of time and energy is rewarded by the industry insights and directions gained. At its conclusion, partners will have a database of critical baseline data, a very clear picture of the destination's status and the directions that might be pursued to further improve tourism industry success.

The additional benefit of this methodology is the expanded and more capable network of industry stakeholders it involves, who, by working together through the process will have a more cohesive focus on solving ongoing and future challenges.

WHY CITY OF KAWARTHA LAKES

There are a number of reasons why City of Kawartha Lakes was eligible and suited for this evaluation exercise, most fundamentally to benefit from a clear appraisal of Kawartha Lakes' current competitive position in the marketplace within the tourism sector.

The final result offers:

- A solid foundation for a tourism development strategy
- The tools needed for additional funding opportunities
- A thorough assessment of the destination's strengths and weaknesses
- A consensus on goals, objectives, priorities and required actions to build the tourism sector
- The justification for ongoing investment in tourism development

As the Premier-ranked Tourist Destinations Project was implemented in various destinations across Ontario, discussions began with the Investment Development Office regarding the opportunities for the City of Kawartha Lakes.

TOURISM PROFILE

What does tourism in City of Kawartha Lakes look like now?

Total # of visits: 1.05 million
Total spending: \$66.9 million generating over \$1 million in Municipal tax revenue
Same day vs. Overnight: 44% same day; 56% overnight

Origin of overnight visitors: 93% Ontario; 4.3% U.S., 2% other provinces and 1% overseas

Travel Party Profile: 77% adult only parties

Market segments for overnight visits: Visiting Friends and Relatives (VFR) 27%, Pleasure; 69%, Business 0.1%

Seasonality of all visits: 29% January to March; 23% April to June; 27.5% July to September, 25% October to December

Source: CTS/ITS 2004

Originally, it was felt that the municipality was too small to undertake the process alone, so a joint project with Peterborough and the Kawartha Tourism was proposed. It was soon determined that the regional geography of both municipalities was too vast to execute the project effectively. In December 2006, City of Kawartha Lakes was approved to proceed and was offered the funding to complete the PrTD framework independently.

This initiative was timely for Kawartha Lakes Tourism as no strategic plan had been undertaken in the area since the County of Victoria Sector-Based Economic Development Strategy adopted by Council in December 1998. The most recent “Community Economic Development Mission”, prepared by WCM Consulting Inc. in June 2007, identified that Economic Development is an investment in the growth and prosperity of the municipality, Tourism being an influential and crucial sector in that process.

The Tourism Advisory Board identified the need to gain an accurate, realistic and current perspective on Tourism in the City of Kawartha Lakes. It was important to begin to understand the implications as they relate to the future. The industry and municipal leaders in City of Kawartha Lakes embraced the process and look forward to the outcomes and recommendations from the PrTD process.

PROJECT PROCESS

Based on an invitation to take part in the PrTD project, an Information Session was lead by Paul Samson of the Ministry of Tourism in the fall of 2006, attended by key municipal and tourism leaders. The process was explained in detail including relevant background, possibilities and opportunities, as well as the potential challenges and barriers that could be encountered.

With funding support from HRSDC/Employment Ontario, Job Creation Program and the Investment Development Office of the Ministry of Tourism, the year long project began on December 4, 2006, under the direction of the Tourism Office. Four Project Coordinators were hired to execute the mandate of the Project and work began on January 8, 2007. The Project Team developed a detailed and extensive list of tourism operators and service providers in Kawartha Lakes, provided ongoing updates on the data collection and the survey process, and reported frequently to the Tourism Advisory Board. Regular communications were released to update the progress of the Project to all our tourism partners. **APPENDIX 1** (Project Communications)

In September 2007, Jill Vandal of the Tourism Company, a Tourism Consultant with in-depth experience in the PrTD Framework process was hired to begin the interpretation of the data. The consultant worked closely with the coordinators and began the process of assessing the data collected. Three community meetings were held in Lindsay, Fenelon Falls and Bobcaygeon in December 2007 to review initial

findings of the Resource Audit and collect feedback on those findings. A presentation of the results garnered from the community meetings and review of audit results was presented to the steering committee in January 2008. Development of a Strategic Tourism Plan ensued in late winter, with a final presentation of the Plan being made by the consultant during a Council Information Session on June 17, 2008.

The entire process was based on 3 stages, clearly defined by 5 steps:

- | | |
|----------|--|
| Stage 1: | EVALUATION |
| | Step 1 Complete the Resource Audit |
| | Step 2 Measure Product, Performance and Futurity |
| Stage 2: | INTERPRETATION |
| | Step 3 Complete destination Performance Summary |
| | Step 4 Determine whether or not Premier-ranked |
| Stage 3: | PLANNING |
| | Step 5 Next Steps in Tourism Development |

STAGE 1: EVALUATION

Step 1: Complete the Resource Audit

The Resource Audit, the foundation of the Framework, records the characteristics of the resources in the destination. The audit relies on four supporting tools: a Tourism Resource/Opportunities Matrix, a Transportation Resource Checklist, a Travel Trade Resource Checklist and the Core and Sector Surveys.

The Resource Audit provides a valuable foundation for the PrTD Framework and is a critical part of the project. A high level of effort and considerable time was invested to complete this portion of the process.

The PrTD Project Team began by creating an extensive tourism database using:

- City of Kawartha Lakes Tourism database
- City of Kawartha Lakes Your Local Marketplace On line Business Directory
- Lindsay, Bobcaygeon and Fenelon Falls Chambers of Commerce memberships
- Tourism brochures and other print materials
- In-depth search on Canada 411 ~ Yellow Pages ~ Internet
- Personal contact by phone to verify up to date and accurate information on new and existing businesses

After initially contacting over 800 businesses, the PrTD team was able to narrow the field to 524 tourism related businesses; of which 444 responded to the surveys. A huge thank you is extended to all the tourism businesses who worked with the PrTD Team in making the ambitious goal of an 85% survey response rate a reality. To more effectively capture our agri-tourism sector, a new sector survey was developed and introduced. It was added to

the series of sector surveys, similar to the ones used by other municipalities across the province.



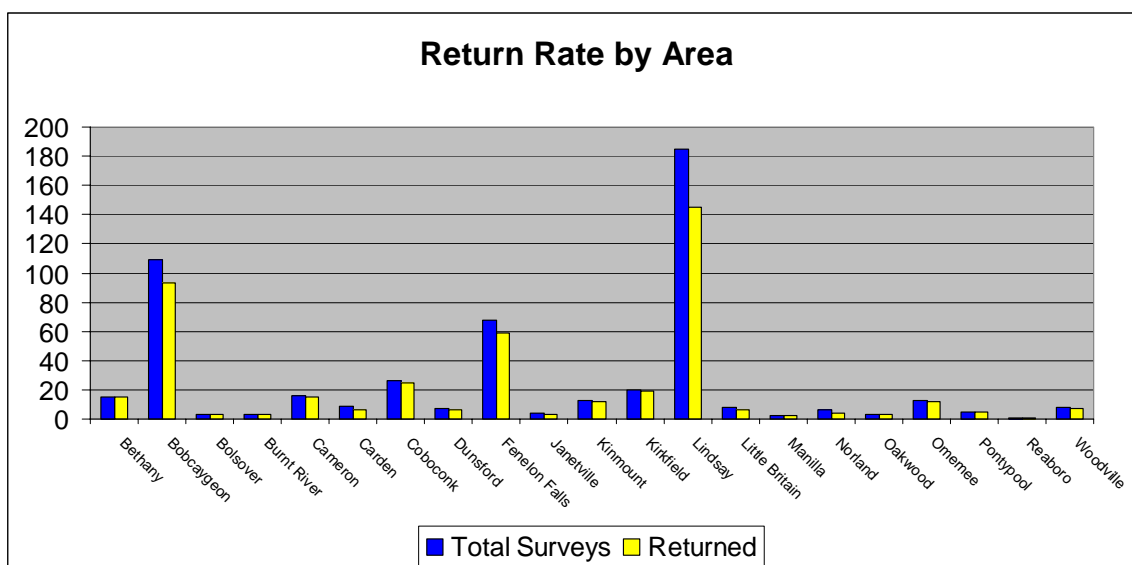
As an incentive during the survey process, each tourism business in Kawartha Lakes which successfully returned the completed surveys was entered into the draw for a chance to win a hand-painted Kawartha Fish Chair, designed and painted by Julie Chessman, a folk artist and member of the Project Team.

The Grand Prize Draw took place at the PrTD Steering Committee Meeting on Thursday, November 15, 2007. The winning business was announced at the Strictly Business Dinner at Beaver Narrows, Omemee on November 22, 2007.

The lucky winners were Olga and Don Metherell of The Pines Cottages of Fenelon Falls

Core Survey Results – by Community

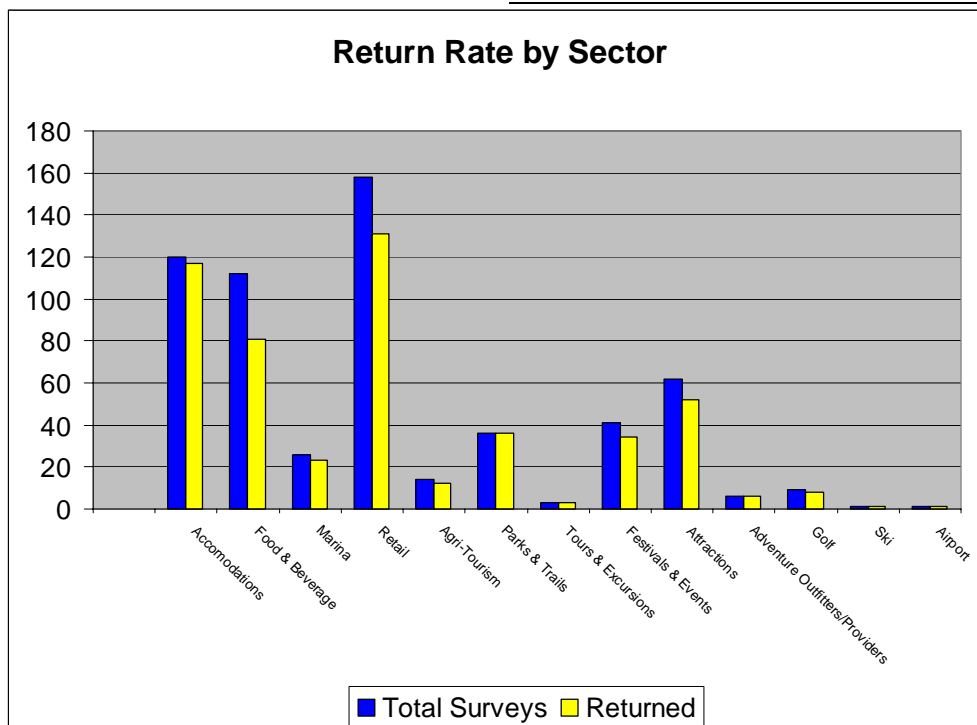
	<u>Total Surveys</u>	<u>Returned</u>	
Bethany	15	15	100.00%
Bobcaygeon	109	93	85.32%
Bolsover	3	3	100.00%
Burnt River	3	3	100.00%
Cameron	16	15	93.75%
Carden	9	6	66.67%
Coboconk	26	25	96.15%
Dunsford	7	6	85.71%
Fenelon Falls	68	59	86.76%
Janetville	4	3	75.00%
Kinmount	13	12	92.31%
Kirkfield	20	19	95.00%
Lindsay	185	145	78.38%
Little Britain	8	6	75.00%
Manilla	2	2	100.00%
Norland	6	4	66.67%
Oakwood	3	3	100.00%
Omeme	13	12	92.31%
Pontypool	5	5	100.00%
Reaboro	1	1	100.00%
Woodville	8	7	87.50%
Total	524	444	84.73%



* Total number of surveys by sector is higher than by Community as each participating business would have responded to multiple surveys depending on the services provided.

Core Survey Results – by Sector

	<u>Total Surveys</u>	<u>Returned</u>	
Accommodations	120	117	97.50%
Food & Beverage	112	81	72.32%
Marina	26	23	88.46%
Retail	158	131	82.91%
Agri-Tourism	14	12	85.71%
Parks & Trails	36	36	100.00%
Tours & Excursions	3	3	100.00%
Festivals & Events	41	34	82.93%
Attractions	62	52	83.87%
Adventure			
Outfitters/Providers	6	6	100.00%
Golf	9	8	88.89%
Ski	1	1	100.00%
Airport	1	1	100.00%
Total	589	505	85.74%



To better serve the tourism businesses and encourage a quick and easy response to the survey process, a contract was established with our On-Line Business Directory, Your Local Marketplace (YLM) to develop and facilitate an on-line survey capability. The data was collected and primarily secured through this service on the tourism website, automatically entering the data on an Excel Workbook for analysis.

Other methods of collecting the completed survey information included person to person assistance, on the telephone and via fax. The accumulated information in the database and the results of the surveys returned formed the basis for completing the PrTD workbook and the Resource Opportunity Matrix.

Step 2: Measure destination Product, Performance and Futurity Dimensions

Each of the measures included in the PrTD workbook were completed using the survey data. The framework gathered information via a series of short surveys from local accommodations, food and beverage establishments, all types of attractions, tourism related services, business improvement areas, festivals and events, parks and trails, rural and agri-tourism operations and every tourism related sector of the community. Included on the surveys were questions focusing on accessibility, visitation patterns and future developments and other relevant information. Additional third party research was also sourced to support the data, through contact with the Ministry of Tourism field staff.

The results of the resource audit, an extensive library of documents, further in-depth research, and interviews with local individuals, authorities and agencies formed the basis for answering the required measures. These measures have been incorporated into this report and form the basis of the evaluation.

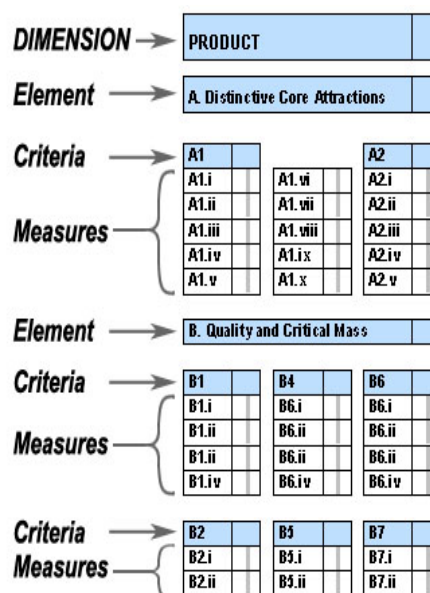
STAGE 2: INTERPRETATION

Step 3: Completion of the Destination Performance Summary

The PrTD Framework asked that the Performance Summary be completed using the following symbols to record the answers to each measure:

- Yes
- Partial
- No

When all the criterion had been assigned their appropriate symbol, an assessment was made to determine the symbol to be used for each element, providing the basis for a judgment that was required



to make the appropriate response for each of the dimensions of Product, Performance and Futurity.

Ultimately, performance on the dimension level is weighted by the extent to which the destination can affirm that it fulfills the expectations laid out by the measures.

APPENDIX 2 (PrTD Dimensions Chart)

The determination of whether the destination is premier-ranked is straight forward. Achieving that status requires:

- a yes in response for the Product dimension,
- a yes in response for the Performance dimension, and
- a yes in response for the Futurity dimension.

With this foundation, identifying potential responses to the destination's weaknesses is possible; creating suggestions/options for future tourism development. These suggestions reflect only a portion of what must be addressed by a tourism development strategy. A destination's strengths, market trends and opportunities and the competitive context must also be considered and integrated into that strategy. **APPENDIX 3** (Resource Opportunity Matrix)

With the funding support of the Ontario Tourism Investment Development Office, the services of a consulting firm, ^{the} Tourism Company, were retained and Jill Vandal joined the City of Kawartha Lakes' Premier-ranked Project Team in September 2007. As a knowledgeable and objective facilitator familiar with the PrTD process, this was a good fit to guide and articulate the summary of results and facilitate the development of a tourism strategy.

Initial research and data collected was shared with the Tourism Consultant who in turn facilitated two steering committee sessions in September and November, as well as three community Strategic Planning meetings to review and apply the three dimensions, Product, Performance and Futurity as outlined in the workbook. A final steering committee wrap-up meeting was held on January 10, 2008.

The three meetings were held in Lindsay, Bobcaygeon and Fenelon Falls with a good representation of industry partners in attendance. The summary of these meetings formed the basis for creating strategic priorities and emerging strategic actions and responses.

Step 4: Determine whether or not Premier-ranked

A visual scan of the performance summary identifies concentrations of strengths and weaknesses in the destination's product, performance and futurity allowing a linkage of current performance to future planning. The Steering Committee and industry partners assisted in the identification of needs in priority and developed strategies. The meeting in January was a strategic planning session to review and finalize the recommended strategic directions.

Whether or not City of Kawartha Lakes is identified as Premier-ranked is not the most important issue. More relevant is the destination's participation in the process and the wealth of knowledge this provides to the municipality and the business community. Moving forward with the development of a strategic plan for tourism is a crucial next step to interpret the information gathered and identify how best to determine and in turn implement the priorities for Tourism in the City of Kawartha Lakes.

STAGE 3: PLANNING

Step 5: Identify Next Steps in Tourism Development

A strike by unionized municipal employees at the City of Kawartha Lakes from February 4 to March 16, 2008 caused an unforeseen delay in the strategic development of the Tourism Plan.

With input from our community partners and the Tourism Advisory Board during April and May a final draft of "A Strategic Tourism Plan for City of Kawartha Lakes" was prepared and presented in June 2008. This is intended as a five year strategy to improve and advance the tourism sector in the City of Kawartha Lakes, identifying 28 priorities with a focus on product development and marketing, supportive of our existing core attractors. Starting from a position of strength, all recommendations will provide the municipality with the short term and long term objectives.

EVALUATION

Evaluation is the step to understanding the reality of City of Kawartha Lakes' tourism offering in clear terms through a comprehensive Resource Audit. The Audit includes understanding and measuring objectively City of Kawartha Lakes Product, Performance as a tourism destination, and its Futurity in terms of how it plans to improve, enhance, and market its attractiveness as a tourism destination.

Throughout this report, symbols are used to indicate the performance rating of each section as determined by the participants in the process.

- Yes, the affirmation can be made and supported for the destination
- ◐ Partial – the affirmation can almost be made and supported – one to several key efforts/investments will enable affirmation
- No – the affirmation cannot be made or supported by the destination

City of Kawartha Lakes PRODUCT Evaluation Rating ▸

The Product components, criteria and measures address the featured that enable a destination to offer a high quality tourist experience made possible through the destination's offerings of:

- Distinctive Core Attractions
- Quality and Critical Mass
- Satisfaction and Value

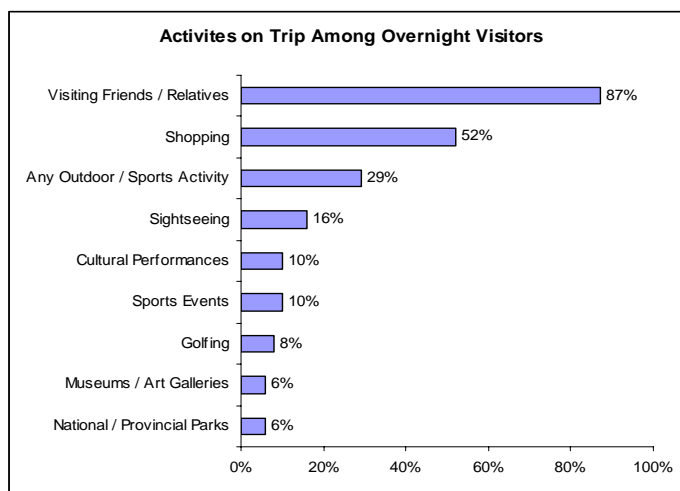
The following product characteristics identify Kawartha Lakes' product attributes:

Distinctive Core and Supporting Attractors

This section assesses what it is about a destination that makes it stand out and distinctive, how the attractors are distinguished and how they are relevant to market wants. The evaluation process has identified Kawartha Lakes core and supporting attractors, their distinctiveness and the nature and size of the visitor markets to which they are to be considered to be attractive.

Core attractors should meet at least two of the following criteria:

- Attract a significant number of visitors annually
- Have a physical or historical link to the destination
- Be a destination landmark



Source: Statistics Canada,
Canadian and International Travel Survey, 2004

City of Kawartha Lakes Core Attractors

Trent-Severn Waterway and link to lakes and navigable waterways
Agricultural Fairs
The Authentic Ontario rural experience
Multi-use Trails
Cottages and Camping
Special interest recreational pursuits
Fleming College

Trent-Severn Waterway

With 6 lock stations and 105 km of waterway linking the vibrant communities of Bolsover, Kirkfield, Rosedale, Fenelon Falls, Lindsay and Bobcaygeon, the waterway is a crucial and essential part of the tourism sector in the City of Kawartha Lakes. In the recently released Panel on the Future of the Trent-Severn Waterway Report – March 2008, the waterway was identified as a premier recreational asset and a world-class destination for boaters.

Agricultural Fairs

Agricultural fairs are a deep rooted century old tradition in the City of Kawartha Lakes. With 6 fairs hosted during the late summer and early fall, visitors and residents attend grand displays of our agricultural heritage and culture. Attracting over 100,000 attendees, these events help to make September the busiest month in the city's Calendar of Events.

Authentic Ontario Rural Experience

Small town charm speaks volumes in our communities that focus on accessible and diverse retail with a good blend of shops, restaurants and essential services. The distinctive historic architecture and the rich culture of each, hosting themed seasonal events enhance the visitor experience. Renewed interest in the community beautification and the partnership required for this has contributed to success in the Communities in Bloom competition.

Multi-use Trails

Victoria Rail Trail and the many nature trails identified in the City of Kawartha Lakes offer a scenic and enjoyable experience for avid cyclists, hikers and nature lovers, and a growing number of ATVers as well. These trails also become a winter wonderland for snowmobilers, traveling across the Victoria Rail Trail to connect to numerous trails heading north. The sheer unspoiled nature of these trails as well as their environmentally significant notoriety attracts visitors from across the province. Adoption of the Trails Master Plan will undoubtedly assist in ensuring that the recommendations in the Plan will preserve and improve the conditions of this abundant and desirable network of trails, while continuing to welcome trail users.

Cottages and Camping

Historically, Kawartha Lakes has been a beloved cottage country, returned to by families who over the decades have established the area and specifically their lake and cottage as their home away from home. Not just privately owned cottages but housekeeping cottage resorts and campgrounds have had repeat visitation over the decades. During the 9 weeks of summer, vacancy rates are very low. The opportunity here is to extend the season – starting in the early spring to the late fall. Great weather is the primary factor here and often the best motivator.

Special Interest Recreational Pursuits

Kawartha Lakes has been host to a multitude of fishing tournaments and derbies, which target avid fishers provincially and nationally. The lakes are well known for world class fishing and attract attention from all levels of competition and recreational angling. Another large draw in organized sport activity is ice hockey, with various tournaments held in the many arenas in the area.

Birding festival and nature gatherings at the Carden Alvar are growing in momentum as the organizing interest groups target their niche markets. Snowmobiling clubs and their related events sustain an active calendar throughout the winter.

Fleming College

The Frost Campus is home to one of Canada's leading environmental education institutions, Fleming College's School of Environmental and Natural Resource Sciences. For almost forty years the school has been producing highly skilled graduates who go on to work in the environmental and natural resource industries across Canada and around the world. This status draws a growing target audience of students, academics and advocates of the environment.

Supporting attractors are features and facilities that attract guests to a destination by giving additional reasons to travel there. Supporting attractors are generally supporting attractors to core attractors

City of Kawartha Lakes Supporting Attractors

Arts, Heritage, Cultural Experiences Festival and Special Events, Live Theatre Small Town Shopping

The core and supporting attractors have significance on their own but also as part of area's main attractions. These attractors are certainly linked to the physical setting of the rural and natural environment of the destination, as well as the close proximity to a large urban centre. There are significant historical links to the core and supporting attractors in the rich agricultural heritage and strong ties to our history and culture.

Although it is acknowledged that the core attractors and travel motivators in Kawartha Lakes are readily available in other Ontario destinations, the overall visitor experience within Kawartha Lakes provides a viable travel proposition.

The tourism product available in Kawartha Lakes is of interest to local, provincial, and to a lesser extent national, US and international markets as noted in CTS data. A significant number of person trips are taken annually for the purpose of experiencing similar products as are available in Kawartha Lakes. For the most part the area's core products have niche appeal as opposed to mass appeal which is not necessarily a negative. Unfortunately, not all product experiences have a year round basis; the vast majority of visitation takes place between May and November, with evidence of a small but significant snowmobiling market.

Quality and Critical Mass

This section addresses the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging in core and related activities as well as entertainment, dining and shopping. The evaluation process has assessed the size of City of Kawartha Lakes' activity and amenities base and the quality of its entertainment, dining and shopping offerings.

City of Kawartha Lakes offers visitors a range of memorable core and supporting experiences sufficient to sustain interest for a day trip, a short stay and in the summer, more prolonged stays and seasonal residency, not available on a year-round basis. An issue facing the destination is that products are not purchasable outside the area. Accommodations and live theatre tickets can be prearranged and booked but attractions, tours and dining experiences are usually booked on-site. In terms of cost for the various attractors these are made available at a wide variety of price points. The range is from free to \$100 plus.

Relaxation	Entertainment	Outdoor Recreation	Arts and Culture	Special Events
Nature Trails \$0	Live Theatre \$25-\$40	Cycling No charge	Museums by Donation	Carden Nature Festival – Pass \$
Boating/ Canoeing Free - \$25 for rentals	Dinner Theatre \$55	Hiking No charge	Kawartha Settlers Village Event fee or By donation	Classics on Kent No charge
Spas – Range \$45 - \$350	Live Concerts at Fall Fairs With Entrance fee - \$5-\$10	Fishing/Angling excursions Kayaking Wakeboarding	Studio Tours and Galleries No charge	Tournaments and Derbies Various entry levels
Golfing - \$45- \$60	Concerts in the Park – No charge	ATVing – licensing fee only	Kawartha Arts Festival – free admission	Snowmobiling Club events -Family - licensing fee only

Source: City of Kawartha Lakes Resource Audit

In terms of promotion, the process could not affirm that this list of activities was well promoted, easy to buy or had multiple distribution points. It also appears that the destination makes insufficient attempt to animate public spaces, to generate interest or excitement in places visitors congregate.

While the destination offers a variety of cultural and entertainment experiences, both contemporary and historic in nature, many are not of mass appeal and under perform in terms of overall draw and recognition. Community organizations, chambers of commerce, and the historical society endeavour to showcase and promote local heritage sites of historical significance.

APPENDIX 4 (Outline of City of Kawartha Lakes Heritage Sites)

Satisfaction and Value

This section documents the extent to which, Kawartha Lakes offers its guests a warm welcome, satisfies expectations and offers value for money. The evaluation process has identified how guests and outside marketers view the area against these attributes. It also evaluates how Kawartha Lakes is investing in improving performance in these areas.

The PrTD process has identified a significant gap in valuable customer satisfaction research. Kawartha Lakes does not have any current visitor experience data that can attest to guest experience in terms of hospitality, warm and friendly people and value for money. This is a concerning gap despite efforts from the business level which are done for the benefit of the establishment and rarely shared.

Accessibility

This section assesses the ease of getting to and traveling within Kawartha Lakes, the transportation modes that service it and the importance of transportation to the tourist experience. The evaluation process has identified how accessible Kawartha Lakes is and how well that accessibility is being managed.

Kawartha Lakes is ideally situated 90 minutes or 125 km north east of the Greater Toronto Area, with access to a diverse population of 6 million and a major international gateway. Ottawa is a 4 hour drive and 380 km away, and the drive time to the closest US border is 3 ½ hours. There are local airports in Lindsay and

Peterborough. For visitors who travel by automobile or motor coach, the drive to Kawartha Lakes is very accessible on routes of 2 lane and 4 lane highways in all directions, including Hwy 35, 7, 48 and many municipal roads. Coach travel is however, very limited as it is currently one arrival and/or departure per day.

Accommodation Base

This section assesses the range of accommodation available in Kawartha Lakes, their location and the presence of higher end operators. The evaluation characterizes the area's accommodation base.

City of Kawartha Lakes offers visitors a variety of accommodation options at a variety of price points with a close proximity of core supporting attractors. Huge concentration of camping opportunities, including RV trailer parks, both seasonal and to a less extent transient, fully services private camp grounds and 2 provincial parks. Roofed accommodation enjoys 70% - 95% capacity during the summer months, with weekends often being full to capacity. Shoulder seasons, both April to June and September to November, although showing signs of growth due to changing weather patterns and seasonal businesses seeing the financial merit of extending the season, still have a great opportunity for development.

Type of Accommodation	Number of Properties	Number of Rooms
RV Park/ Campground	40	4,471 sites 90% are seasonal
Housekeeping Cottages	51	423
Motels and Inns	23	364
Bed and Breakfasts	20	53

Source: City of Kawartha Lakes PrTD Resource Audit - July 2007

Although there are no chain motels, several name brand chains are located within a short distance to the area, in Durham Region and the City of Peterborough.

Based on the criteria, it was clear that in the dimension of Product, Kawartha Lakes received a Partial classification. It is evident that a desirable product exists by the sheer geography of the area. Its appeal is our quality natural attractions, lakes and waterways. Product is not exclusive unique in Ontario. Many of our neighbouring tourist destinations offer similar range of opportunities and experiences. Transportation and accessibility as well as Accommodation Base, Kawartha Lakes scored low and lacking.

City of Kawartha Lakes PERFORMANCE Evaluation: Rating ○

The Performance measures identify the extent to which Kawartha Lakes is successful and recognized in the marketplace. By comparing Kawartha Lakes' performance attributes in terms of hard data conclusions can be determined as to its actual performance against its primary competitors and in a competitive marketplace context. Visitation statistics, accommodation occupancy levels and critical acclaim are all industry standards to measure performance.

The quality of the tourist experience and the destination's success in providing it is validated by:

- Visitation
- Occupancy and Yield
- Critical Acclaim

Visitation

This section assesses Kawartha Lakes' market performance in terms of visitation numbers and market share, attractiveness to different market segments and different times of the year. The following Statistics Canada Travel Survey Data information breakdown visitation numbers and purposes:

2004 Visitor Statistics - Victoria County						
	Total	Other Canada	Canada	Ontario	U.S.	Overseas
Person Trips	1,048,691	10,971	1,003,345	992,374	38,108	7,238
Same Day	465,016	0	450,781	450,781	12,987	1,247
Overnight	583,675	10,971	552,564	541,593	25,120	5,991
Pleasure	569,756	1,604	546,462	544,858	19,661	3,632
VFR	360,965	963	341,267	340,304	16,622	3,076
Business	15,188	0	14,640	14,640	365	183

2004 Visitor Spending - Victoria County						
	Total	Other Canada	Canada	Ontario	U.S.	Overseas
TOTAL spending	66,855,522	812,494	58,643,228	57,830,734	6,125,820	2,086,474
Public Transport	212,941	0	0	0	69,872	143,069
Vehicle Rental	1,104,703	0	0	0	350,784	753,919
Vehicle Operations	11,246,888	159,247	10,925,329	10,766,083	286,786	34,773
Local Transport	625,067	974	3,887	2,912	594,556	26,624
Accommodation	5,607,558	54,674	5,034,497	4,979,823	206,170	366,891
Food & Beverage (Total)	27,582,668	371,015	24,334,571	23,963,556	2,837,232	410,865
Food & Bev. (Stores)	10,851,196	315,972	9,370,618	9,054,645	1,319,354	161,224
Food & Bev.(Rest./Bars)	16,731,472	55,042	14,963,953	14,908,911	1,517,879	249,640
Recreation/Entertainment	8,325,641	120,064	7,399,193	7,279,128	798,945	127,504
Retail/Other (Total)	12,150,055	106,519	10,945,751	10,839,232	981,475	222,830
Clothing	5,401,253	78,223	4,831,204	4,752,981	465,300	104,749
Other Retail	6,748,802	28,296	6,114,547	6,086,251	516,175	118,081

Source: Statistic Canada, Canadian and International Travel Survey, 2004

Kawartha Lakes attracts most of its visitation from the domestic market and primarily from Ontario: 85% of overnight visits and 90% of day visits originate from Ontario. Few visitors originate from the U.S. or international markets placing Kawartha Lakes well below provincial averages for visitors from outside Ontario's borders. The percentage of visitors from any point of origin is negligible compared to the percentage of total trips to or within Ontario.

Meetings and convention business to Kawartha Lakes is insignificant, due to a lack of facilities capable to host other than small groups or parties. Nonetheless, research has shown that one is motivated to travel based on what to see and do. Special events and festivities in 2007 saw a very busy calendar. This year showcased a series of special Anniversary Celebrations. A fairly good distribution of events throughout the year, took place particularly in the Summer and Fall. September was the busiest month on the calendar.

APPENDIX 5 (Mayor Festivals and Events in 2007)

Occupancy & Yield

This section assesses Kawartha Lakes market performance in terms of accommodations occupancy and guest expenditure levels. The evaluation compared occupancy and expenditure performance against industry and provincial averages.

Average per Capita day trip expenditure for a guest is \$34, well below of the provincial average which is \$270.27. This reflects a high cottage and campground use and sizable visiting friends and family market. Overnight expenditures per guest are also below the provincial average. In 2004, overnight visitors stayed in the following: 14% in roofed commercial lodgings, 28% in campgrounds/trailer parks and 55% in private homes, or private cottages.

Critical Acclaim

This section addresses the extent to which Kawartha Lakes is recognized as a must-see destination, has a profile that contributes to the attractiveness of Ontario and Canada as a destination, and is a "top-ranked" place to visit. The evaluation identifies if Kawartha Lakes is recognized as standing out from its competitors.

One could argue that Kawartha Lakes is a must-see destination given its unique personality and charm, its well known beauty, lakes and waterways, trails and natural and unspoiled natural environment, quaint downtowns and their historic heritage.

Within the markets Kawartha Lakes draws from, several other destinations exist that would rank higher on the list of must-see locations. In a competitive set, they include Muskoka, Georgian Bay, Peterborough and the Kawarthas, all well known Ontario cottage country destinations. However, being totally objective, it is difficult to consider Kawartha Lakes a "must see/ must do" destination for out of town guests when compared to other destinations in close proximity to Kawartha Lakes.

For some of its core attractions, Kawartha Lakes does have critical acclaim. Kawartha lakes and waterways known for world class fishing, the Trent-Severn Waterway, Balsam Lake Provincial Park, fourth largest park in Ontario. House boating on the Trent-Severn Waterway is a unique experience only found in limited locations in canal systems in the US and Germany. Highlands Cinemas and Museum in Kinmount has built a steady draw to its theatres from the Kawartha Lakes and Haliburton cottage market, with media attention from across the province. Fleming College has recently received accolades and recognition, based on the ambitious plan to become world class in its field.

In the dimension of Performance for Kawartha Lakes, the affirmation cannot be made or supported. Many factors can be attributed to the rating.

Kawartha Lakes FUTURITY Evaluation: Rating ▶

Futurity identifies the extent to which Kawartha Lakes is investing in its future as a place with viable and continuing attractiveness to evolving markets. It includes the activities in place to raise awareness for the destination as well as the degree in which new investment in the form of capital dollars will be made to enhance its product offering. It also determines its capacity in a number of physical measures such as infrastructure.

The ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

Destination Marketing

This section identifies to what extent Kawartha Lakes targets viable markets, invests in managing and promoting its tourism marketplace, and consults with the travel trade serving Kawartha Lakes. The evaluation identifies if Kawartha Lakes is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.

Within the City of Kawartha Lakes, there are several organizations involved with tourism. These include the Economic Development Department including the Tourism Division, the Chambers of Commerce of Lindsay, Bobcaygeon and Fenelon Falls, as well as the Lindsay BIA and various business improvement organizations. These all play a role in the tourism industry, whether it is in the area of product development, event organization and support, marketing or visitor services. As the link to external associations like regional partners such as Peterborough and the Kawarthas Tourism, Getaway Country Tourism Partnership, and Ontario Tourism Marketing Partnership, the Tourism Office, as the destination marketing organization for the City of Kawartha Lakes, is not adequately funded to take advantage of a wide variety of co-op marketing opportunities and partnership programs.

The destination does limited and unscientific marketing or tracking research and therefore cannot accurately measure the effectiveness of marketing dollars it is spending. Marketing and advertising has been more focused on the destination as a whole, rather than niche marketing, often through affordable co-operative opportunities with regional partners. Tourism website presence is weak and lacking as compared to competitive neighbouring destinations.

Kawartha Lakes Tourism operates with an annual business plan determined by budget allocations which have been steady declining since 2002. There is no tourism development strategy in place, currently. There has been a focus to grow

the tourism business specifically in the shoulder seasons. The development of a summer fall map and events map showcasing events and attractions from April to November has attempted to lure summer visitors to return again in the fall. September is the busiest month with 9 major events and fairs taking place.

While customer service training is viewed as important, little, or no area-wide initiatives are in place. Individual businesses conduct some form of tourism hospitality or service training but it appears there is a gap of delivering consistent quality training. Without visitor survey data, it is difficult to determine if hospitality and service performance is an issue of area of concern.

Product Renewal

This section identifies the extent to which Kawartha Lakes is making capital investments in its attractiveness into the future. The evaluation documents the status and magnitude of Kawartha Lakes investment in the future.

In the past five years, significant dollars have been invested in the facility renewal and/or expansion and development across the municipality. Close to 80% of this investment has occurred in the last two years. There appears to be an ongoing commitment from individuals to continually reinvest in facilities and infrastructure.

The amount of Investment noted in past 2 years is \$4,117,450.00 which represents 53% of the past 5 years of investment of \$7,800,000.

Total Disclosed Investment in the last 5 years

Sector	Number of Establishments	Investment	Percentage of Total
Accommodations	24	\$2,407,000	31%
Agri-Tourism	1	\$20,000	0.3%
Attractions	5	\$251,000	3.2%
Festivals & Events	5	\$763,400	9.8%
Food & Beverage	4	\$148,000	2%
Golf Courses	2	\$265,000	3.4%
Marinas	2	\$295,000	3.8%
Parks & Trails	4	\$205,000	2.7%
Retail	17	\$2,309,700	29.6%
Skiing/Snowboarding	1	\$1,000,000	12.8%
Tours/Excursions	1	\$45,000	0.6%
Total Disclosed Investment	66	\$7,799,000	100%

Source: City of Kawartha Lakes Resource Audit

A number of retail and food and beverage businesses also benefit from the tourist trade and have made a total investment of \$719,000 in their establishments in the past 5 years:

Managing within Carrying Capacities

This section assesses the extent to which Kawartha Lakes is aware of, and manages within, its capacity thresholds specifically its local economy, ecosystems and soft services infrastructure, its guest's satisfaction levels, hard services infrastructure, and its administrative systems. The evaluation documents Kawartha Lakes ability to manage the system that sustains it.

Tourism has a positive impact on Kawartha Lakes. Employment rates, especially in the summer are strong and there is a significant number of tourism businesses recently opened or in development. It appears the popularity of the area has also affected housing costs. Home prices have moderately increased an average 10% per year over the last 5 years according to the Kawartha Lakes Real Estate Board. This could be considered a negative as high housing costs could impact the destination's ability to attract other business and a work force to populate developing businesses.

Generally speaking, the labour pool in Kawartha Lakes is limited especially when it comes to the tourism and hospitality industry. Many operators observe that it is difficult to find qualified seasonal help and are always facing the challenge of the cost of staffing. There is no city wide initiative to address a shortage of seasonal skilled workers. A Business Condition Survey, as reported by Ontario Tourism Research, projects that the growing labour shortage will soon begin to affect Ontario's labour pool. It is not identified as an issue with Kawartha Lakes for the time being.

In terms of the carrying capacities of the natural systems that sustain local ecosystems, there are various organizations who undertake environmental monitoring programs in place that advise on the quality of the resource or whether the visitor experience is at risk of being impaired. These include: Ministry of Natural Resources, Nature Conservancy of Canada (Carden Alvar), Fleming College, Kawartha Conservation and the Haliburton Kawartha Pine Ridge Health Unit along with many cottage lake associations.

Water and sewage capacities are near capacity while other parts of Kawartha Lakes still have sufficient capacity. In the summer, close monitoring of water quality by the Health Unit, frequently results in the beach closures due to e-coli bacteria in the water. There is no current indication that community health threshold is being extended.

Although the City of Kawartha Lakes Official Plan has not officially been approved, there is a proposed section in the Plan which addresses the need for Tourism consideration in the growth and development of City of Kawartha Lakes:

3.1.10. Tourism

Goal - To promote and enhance the tourism opportunities within the City:

Objectives:

1. Recognize and promote tourism as one of the most important components of the City of Kawartha Lakes' economic growth
2. Promote and maintain the City as an attractive community to visit through community beautification, improvement and redevelopment
3. Generate greater retention of tourism activities, which make use of local facilities including four-season tourism
4. Encourage new high quality tourism attractions, accommodations, facilities and services, including the Kawartha Lakes Municipal Airport, to promote the City as a tourist destination
5. Promote the use of natural heritage resources in the development of tourism and facilitate the development of eco-tourism and agri-tourism opportunities
6. Encourage the continued operation and development of tourist related commercial establishments
7. Promote the development of the City as a cultural, multi-functional community and encourage the use of cultural heritage resources in tourist facilities. Concentrate forms of economic activity into nodes of interest, specifically highlighting the arts community
8. Recognize the significance of the City's waterways and the Trent-Severn Waterway and co-operate with the Provincial and Federal Governments to ensure that both the natural amenities and economic benefits associated with the waterways are realized

Source: City of Kawartha Lakes Draft Official Plan – as at June 22, 2008.

Areas of Strength

Kawartha Lakes has a number of qualities and attributes to be proud of. The PRTD has identified that Kawartha Lakes is starting from a position of strength including:

- Significant critical acclaim as a preferred cottage destination, based on large percentage of visiting friends and family (VFR) market
- Proximity and accessibility to the Greater Toronto Area – a population of over 8 million
- A renewed focus on the Trent-Severn Waterway and the potential role for the City of Kawartha Lakes to play as we acknowledge the waterway as a strong and viable economic driver for Tourism.
- New ownership of well established resorts and establishments, bringing with them new ideas to market and promote their new business
- Environmentally significant natural areas including Kawartha Conservation lands and the Carden Alvar
- Individuals and organizations who continue to invest in renewal and new product development and infrastructure

Areas of Improvement

Product:

- The accommodation offerings are limited with no “name brand” hotels available.
- The destination experience is not known to be unique or memorable.
- Kawartha Lakes culture and heritage product is underdeveloped and underperforming.
- Core and supporting attractors are not widely promoted.
- Core and supporting attractors are not easy to purchase.
- Product offering is primarily available June to October.

Performance:

- It appears primary visitation involves day trips.
- Destination does not carry out regular guest surveys to track customer satisfaction with value, service, and hospitality.

- Key experience, service, and prices are not monitored.
- Lack of transportation links into and throughout the area; visitors' dependent upon private automobiles to see full range of offering.
- Accommodation occupancy well below the provincial averages.

Futurity:

- No long term tourism development or marketing strategy currently in place
- Destination marketing dollars are inadequate and unreliable
- General awareness of the importance of tourism within Kawartha Lakes is low.
- Destination or any of its core attractors do not rank "best in class" or "top tier".
- No destination progress tracking mechanism is in place.
- No coordinated customer service training program is in place.
- More investment required in developing and revitalizing underdeveloped and underperforming assets.
- No plan in place to manage tourism carrying capacity within the region-labour market, housing prices, quality of life, and natural systems.

Conclusions

The areas that require attention and improvement under the abovementioned Product, Performance, and Futurity headings have led to a number of conclusions:

- 1) Need to formalize the tourism industry leadership role within Kawartha Lakes
- 2) Need for a long term tourism development and marketing strategy that addresses the changing complexion of the tourism offering in Kawartha Lakes.
- 3) Need for annual quantifiable research to monitor guest satisfaction levels.
- 4) Need for ongoing hospitality training related to delivering excellent customer service.

- 5) Need for improved public transportation options between communities and tourism attractors within the region.
- 6) Need for consistent and ongoing investment in destination development and marketing.
- 7) Need for resources and energy to be directed to underdeveloped tourism experiences especially within the not for profit culture and heritage sector.
- 8) Accommodations sector should establish standards or best practice guidelines for all those in the accommodation sector.
- 9) Need to understand and manage the impact that growth from tourism will have on infrastructure within Kawartha Lakes over the long term.
- 10) Need to establish a fully embraces “culture of Tourism” in the City of Kawartha Lakes

Next Steps:

- Submission and Council Approval of A Strategic Tourism Plan for City of Kawartha Lakes
- Identification of Key Priorities in the short term, with plans for implementation
- Solicit community and municipal support for long term commitment to the growth and prosperity of the Tourism Sector in the City of Kawartha Lakes

APPENDIX 1
Premier-ranked Tourist Destinations
Project Communications



May 22, 2007

PREMIER-RANKED TOURIST DESTINATIONS PROJECT UPDATE

Warm greetings to all Tourism Partners!

The Premier-ranked Tourist Destinations Project is in full swing. Surveys are currently being returned at an optimistic rate, with a good representation from all sectors of the tourism industry.

Stay tuned as we provide updates on the data assessment in the weeks to come. We look forward to your prompt response to the surveys. Only then, will we have the relevant information to develop a strong and positive direction for tourism in Kawartha Lakes.

“As one of 5 strategic focus initiatives with the Tourism Advisory Board, we are very enthusiastic with the energy and community support directed to this Premier-ranked Tourist Destinations project. Achieving our target of an 85% response rate to this short survey will greatly assist our Board with input from our tourism businesses in helping to create the longer term development for Tourism. This Initiative will create the path forward in developing a stronger tourism destination by forming the action plan for sustainable tourism growth within the City of Kawartha Lakes.”

*Tom Bath, President, Centre Point Landing
Chair, City of Kawartha Lakes Tourism Advisory Board
Executive Vice President,
Bobcaygeon and Area Chamber of Commerce*

The PrTD Team would like to thank those of you who have completed and returned their surveys. Now that the summer season has begun, we understand how busy you are and appreciate your participation. For those of you who have not had a chance to complete your surveys, it's not too late. The data collection process will continue as we encourage the completion of the surveys, aggressively aiming toward our ambitious goal of 85% response rate by early July.

You can return your completed surveys by fax, mail or on-line at www.explorekawarthalakes.com – just follow the link from the Home page.

And remember, your name will be entered into a free Draw for a chance to win a handcrafted 'Kawartha Fish Chair'. We are more than happy to assist you in completing the surveys. You can call one of the four Team Co-ordinators at (705) 878-0779 or set up an appointment for us to visit.

We are all looking forward to growth in **our** Tourism Industry and will be in touch with you throughout the summer. We count on your support and cooperation to make it happen!





November 1, 2007

**City of KAWARTHA LAKES
PREMIER-RANKED TOURIST DESTINATIONS
PROJECT UPDATE**

Having reached 85% response in the survey process, the City of Kawartha Lakes Premier-ranked Tourist Destinations (PrTD) Project continues to progress into its final phase. A huge thank you is extended to all the tourism businesses who worked with the PrTD Team in making this ambitious goal a reality. The process has fostered greater communication within the tourism sector and the business community. It could not have been done without it.

We now have a comprehensive inventory of tourism assets and a common understanding of our tourism demand generators. This will become the foundation for a tourism development strategy and recommendations for future growth and sustainability. We also have a benchmark to measure tourism performance and a foundation for new marketing initiatives.

At this crucial stage of the project, we have contracted Jill Vandal, Tourism consultant with the Tourism Company who will be guiding the process as we develop a 5-10 year Strategic Plan for Tourism in the City of Kawartha Lakes. One of the key initiatives will be to assess the data collected and identify tangible initiatives and strategies that will guide the municipality into the future. The outcome of this review will enable us to better understand our development, infrastructure, training and investment needs. It will help define our strengths, potential product clusters, as we strive to identify our major trip motivators and markets for each community within the City of Kawartha Lakes.

With the support and partnership of the PrTD Steering Committee, we seek representation from all tourism sectors, including chambers, accommodations, marinas, golf clubs, services, events and attractions, as well as municipal services to assist in identifying our strengths and challenges in all tourism sectors as well as potential opportunities to grow the industry within Kawartha Lakes.

Jill looks forward to sharing with you the findings of the Resource Audit. With your experience and knowledge, we will validate and confirm the information gathered and begin to identify the obvious priorities that are emerging. Your valuable input is key and will certainly impact the proposed strategic plan and unfolding recommendations.

We invite you to mark your calendars with the dates noted in the schedule below. These gatherings have been identified to ensure that both the 'community champions' and the

tourism businesses will have ample opportunity to work with the Tourism Consultant as we define and confirm the existing and potential tourism product within Kawartha Lakes. We aim to ensure good representation geographically as well as by sector.

This first meeting will be an outline of the Project goals and objectives and it is here that we will seek your direction and insight as we develop a viable and actionable strategic plan for Tourism in Kawartha Lakes.

STRATEGIC PLANNING MEETING SCHEDULE

DATE AND TIME	ATTENDEES	LOCATION
Thurs. November 15 1:30 pm – 3:30 pm	PrTD Steering Committee	LINDSAY Victoria Room, City Hall,
Wed. November 21 9:00 am – 11:00 am	Tourism Advisory Board	LINDSAY The Guild Room, Academy Theatre
Thurs. December 6 3:00 pm – 5:00 pm	PrTD Steering Committee Tourism Partners, Council	FENELON FALLS Royal Legion
Thurs. December 6 7:00 pm – 9:00 pm	PrTD Steering Committee Tourism Partners, Council	BOBCAYGEON CKL Service Centre
Fri. December 7 9:00 am – 11:00 am	PrTD Steering Committee Tourism Partners, Council	LINDSAY North End Room, The Lindsay Armoury
January 10, 2008 1:00 pm – 3:00 pm	PrTD Steering Committee	TBC

For further information, and to confirm your attendance at the planned meetings,
please contact: Margaret P. Cunningham, Tourism Development Officer
at 705-324-9411 ext. 233
or email at mcunningham@city.kawarthalakes.on.ca



2007 PREMIER-RANKED Tourist Destinations Project

This hand painted “**Kawartha Fish Chair**”
is the Grand Prize for the **Premier-ranked Tourist Destinations
Project (PrTD) Survey Draw.**

Grand Draw took place at the PrTD Steering Committee Meeting
on Thursday November 15, 2007

The lucky winners are:
**Olga and Don Metherell of
The Pines Cottages of Fenelon Falls**

Each tourism business in Kawartha Lakes which successfully returned the completed surveys was entered into the Draw for a chance to win.

The prize chair was on display throughout the summer in various locations with the winner to be drawn in November and presented at the Strictly Business Dinner at Beaver Narrows on Thursday, November 22, 2007.

With the support of the Tourism Advisory Board, the Premier-ranked Tourist Destinations initiative, a provincially funded project will assess the current state of tourism in the City of Kawartha Lakes, assist in better understanding our strengths and weaknesses and identify growth opportunities.

A team of researchers were hired to complete an inventory of all tourism businesses and to coordinate the completion of related surveys. The Project Team has all been locally hired under the MCTU Job Creation Program.

**For further information regarding this project, please contact
the PrTD Office at (705) 878-0779.**



THE CITY OF
KAWARTHA LAKES
Economic Development - Tourism
180 Kent Street West,
Lindsay, ON K9V 2Y6
705-324-9411 ext. 233 or 1-866-397-6673

MEDIA RELEASE

For Immediate Release

November 22, 2007

The Kawartha Lakes Premier-ranked Tourist Destinations Project seeks public input

Leading tourist destinations are constantly trying to distinguish themselves in the marketplace. Some present themselves as being a "Premier-ranked Tourist Destination", the word "premier" meaning *first in rank, position, importance or quality*. That's why City of Kawartha Lakes embarked on the Premier-ranked Tourist Destinations (PrTD) Project - to help Kawartha Lakes classify and categorize its tourism assets and infrastructure, and to help the municipality grow these assets into new and existing markets.

With funding support from Employment Ontario and the Job Creation Program and the Investment Development Office of the Ministry of Tourism, the year long project began on January 8, 2007, under the direction of the Tourism Office. The hired Project Coordinators have worked hard to put together a detailed list of tourism operators and services in Kawartha Lakes. After initially contacting over 800 businesses, the PrTD team was able to narrow the field to 524 tourism related businesses; of which 438 responded to the surveys. A huge thank you is extended to all the tourism businesses who worked with the PrTD Team in making the ambitious goal of an 85% response rate a reality.

As an incentive during the survey process, each tourism business in Kawartha Lakes which successfully returned the completed surveys was entered into the Draw for a chance to win a hand painted Kawartha Fish Chair, by Julie Chessman, a folk artist and member of the Project Team. The Grand Prize Draw took place at the PrTD Steering Committee Meeting on Thursday, November 15, 2007. The winning business will be announced at the Strictly Business Dinner at Beaver Narrows on November 22, 2007. The lucky winners are Olga and Don Metherell of The Pines Cottages of Fenelon Falls. The prize chair will be on display at City Hall in Lindsay, till the New Year.

A Steering Committee comprised of key tourism partners was formed to provide support to the project. This group includes representation from all tourism sectors within Kawartha Lakes: accommodations, campgrounds, parks, retail, culture and heritage organizations, event organizers, agri-tourism venues, Trent-Severn Waterway and trails,

as well as local chambers, associations and municipal planning staff. An initial meeting with Jill Vandal, Tourism consultant of the Tourism Company took place on Thursday November 15 at City Hall in Lindsay. At this meeting, the results of the surveys were assessed and tangible initiatives and strategies were explored. These discussions began to identify gaps and potential opportunities within the tourism sector.

To further the information gathering, the Tourism Office with the support of the PrTD Team and the Tourism Consultant will host 3 scheduled public meetings in Fenelon Falls, Bobcaygeon and Lindsay. All tourism businesses and community partners are invited and encouraged to share their experience and knowledge, as the data collected is validated and confirmed. The goal is to more closely identify the obvious priorities that are emerging. The tourism community's valuable input is key and will certainly impact the proposed strategic plan and unfolding recommendations. Three public gatherings have been scheduled to ensure there is ample opportunity to listen to and work with the Tourism Consultant, during this crucial stage of the project, ensuring good representation from across the municipality.

This is an exciting project, which the City of Kawartha Lakes is pleased to be involved in. Ultimately, it is all about helping grow business in the City of Kawartha Lakes. This comprehensive study of tourism in Kawartha Lakes will set the stage and provide the tools for the development of a long-term community tourism strategy, plan and program.

**PREMIER-RANKED TOURIST DESTINATIONS PROJECT
STRATEGIC PLANNING MEETING SCHEDULE**

DATE AND TIME	ATTENDEES	LOCATION
Thurs. December 6 3:00 pm – 5:00 pm	PrTD Steering Committee Tourism Partners, Council	FENELON FALLS Royal Legion
Thurs. December 6 7:00 pm – 9:00 pm	PrTD Steering Committee Tourism Partners, Council	BOBCAYGEON CKL Service Centre
Fri. December 7 1:00 pm – 3:00 pm	PrTD Steering Committee Tourism Partners, Council	LINDSAY North End Room, The Victoria Park Armoury
January 10, 2008 1:00 pm – 3:00 pm	PrTD Steering Committee	LINDSAY Victoria Room, City Hall 26 Francis Street, Lindsay

**For further information, and to confirm your attendance at the planned meetings,
please contact: Margaret P. Cunningham, Tourism Development Officer
at 705-324-9411 ext. 233
or email at mcunningham@city.kawarthalakes.on.ca**



April 12, 2008

City of Kawartha Lakes Tourism PREMIER-RANKED TOURIST DESTINATIONS PROJECT

UPDATE

In February 2008, Jill Vandal of the Tourism Company presented “A Strategic Tourism Plan for City of Kawartha Lakes”, as a result of the Premier-ranked Tourist Destinations Framework, identifying key findings from the PrTD analysis, including input from industry meetings held in December 2007, in Lindsay, Bobcaygeon and Fenelon Falls. Over 500 tourism businesses participated in the PrTD project in either the survey process, as community champions and/or the public sessions.

To execute the recommendations found in this Plan, City of Kawartha Lakes will require:

- Close determination of the priorities
- Focus on the immediate, short-term and long term objectives
- Consider the realistic opportunities by flushing out more specific detail
- Buy-in from the Tourism Advisory Board and Council
- Presentation to the tourism partners
- Development of strong partnerships and ownership of the process

Consultant will provide priorities and implementation recommendations in chronological order, showing a focus on realistic objectives, within the knowledge gain relative to our tourism environment in which these will be executed. Final report will include a chronological action plan to facilitate buy-in and ownership not only to the recommendations but, to their implementation and follow through.

NEXT STEPS

1. Consultant, with input from the Tourism Advisory Board, will revise and amend this report including plan of action, time frames and implementation recommendations
2. Approval of revised Strategic Tourism Plan by Tourism Advisory Board
3. Re-grouping of the PrTD steering committee
4. Presentation to Council, to establish buy-in to the Strategic Tourism Plan if deemed appropriate
5. Launch of Premier-ranked Tourist Destinations Final Report to Tourism industry at Toast to Tourism. * Potential of inviting the Minister of Tourism to the event to be considered

OPPORTUNITIES/KEYS TO SUCCESSFUL IMPLEMENTATION

- Crucial tourism industry involvement in the execution of recommendations.
- As partners and contributors, the tourism industry will be empowered to get involved, in the spirit of team effort, financial creativity and resourcefulness.
- To retain Jill Vandal of the Tourism Company to advance the implementation of Strategic plan
- Partnership building towards the building of an active committee to assist in the plan forward of the priorities
- Product Development and Event Taskforce
- Local and provincial support to embark on identified Tourism priorities

FUNDING SUPPORT

EODP Funding Application - due April 15, 2008

Ministry of Tourism Investment Development Office Post Project Funding

APPENDIX 2
Premier-ranked Tourist Destinations Framework
Product/Performance/Futurity Chart

**PREMIER RANKED
TOURIST DESTINATION**

E1.i	Y
E1.ii	X
E1.iii	N

A. Distinctive Core Attractions

A1		A2	
A1.i	Y	A2.i	Y
A1.ii	Y	A2.ii	Y
A1.iii	Y	A2.iii	Y
A1.iv	N	A2.iv	N
A1.v	Y	A2.v	Y

B. Quality and Critical Mass

B1		B4		B6	
B1.i	Y	B6.i	Y	B6.i	Y
B1.ii	Y	B6.ii	Y	B6.ii	N
B1.iii	Y	B6.iii	Y	B6.iii	Y
B1.iv	Y	B6.iv	N	B6.iv	Y

B2		B5		B7	
B2.i	Y	B5.i	Y	B7.i	Y
B2.ii	Y	B5.ii	Y	B7.ii	Y

B3	
B3.i	Y
B3.ii	Y

C. Satisfaction and Value

C1		C2		C3	
C1.i	Y	C2.i	N	C3.i	Y
		C2.ii	N	C3.ii	N
				C3.iii	A

D. Accessibility

D1		D3		D4	
D1.i	Y	D3.i	A	D4.i	Y
D1.ii	Y	D3.ii	N	D4.ii	Y
D1.iii	Y	D3.iii	Y		
D1.iv	Y	D3.iv	Y		
D1.v	Y				

D2	
D2.i	Y
D2.ii	A

E. An Accommodation Base

E1	
----	--

PERFORMANCE

F. Visitation

F1		F2		F3	
F1.i	Y	F2.i	Y	F3.i	Y
F1.ii	N				
F1.iii	N				
F1.iv	N				
F1.v	N				
F1.vi	N				
F1.vii	N				
F1.viii	N				

G. Occupancy and Yield

G1		G2	
G1.i	N	G2.i	N
G1.ii	A	G2.ii	N
		G2.iii	N
		G2.iv	N

H. Critical Acclaim

H1		H2		H3	
H1.i	Y	H2.i	A	H3.i	Y
H1.ii	Y			H3.ii	Y

FUTURITY

I. Destination Marketing

I1		I3		I5	
I1.i	Y	I3.i	Y	I5.i	N/A
I1.ii	Y	I3.ii	A		
I2		I4		I6	
I2.i	Y	I4.i	N	I6.i	N
I2.ii	Y				
I2.iii	N				

J. Product Renewal

J1		J2	
J1.i	Y	J2.i	Y
J1.ii	Y	J2.ii	Y
J1.iii	Y		

K. Managing w/ Carrying Capacities

K1		K4		K6	
K1.i	Y	K4.i	Y	K6.i	
K1.ii	N	K4.ii	Y	K6.ii	Y
		K4.iii		K6.iii	Y
		K4.iv		K6.iv	N
K2		K5		K7	
K2.i	Y	K5.i	Y	K7.i	N
K2.ii	N/A	K5.ii	A	K7.ii	Y
K2.iii	Y	K5.iii	Y	K7.iii	N
K2.iv	N/A				
K3					
K3.i	Y				
K3.ii	N/A				
K3.iii	Y				
K3.iv	N/A				

LEGEND

Yes	Y	Yes, the affirmation can be made and supported for the destination
A	A	The affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation
No	N	No, the affirmation cannot be made/supported for the destination

Note that blank cells indicate that performance against the measure was not determined.

APPENDIX 3
Premier-ranked Tourist Destinations Framework
Resource Audit Matrix

TOURISM RESOURCES – BUILT/MANAGED			OPPORTUNITIES							MARKETS						Comment Key							
			Count	Resource Opportunities	Core Attractions	Supporting Attractions	On-Theme Activities	Underdeveloped Assets?	Group Travel?	Packaged?	EXISTING			POTENTIAL			DESIRED						
									Regional	Provincial	National / U.S.	International	Regional	Provincial	National / U.S.	International	Regional	Provincial	National / U.S.	International			
		Bed and Breakfast	12					5	3	2	3	2	1									110	
		Houseboats	2							3	3	2	1									111	
		Resort Lodge	2					1	1	3	2	1	0									112	
		Eco-Lodge	0																			113	
		Condominium	0																			114	
		Condo/Hotel	0																			115	
		Spa	6						1	3	1	1	1									116	
		Motel - Mid-Market	10					7	1	3	3	2	1									117	
		Motel - Up-Market	0																			118	
		Hotel - Mid-Market	6					2	1	2	3	1	1									119	
		Hotel - Up-Market	2					2	2	3	1	1	1									120	
		Conference Convention Centre	1																			121	
		Mid-Scale Meetings Facilities	30					1		3	2	1	1									122	
		Small-Scale Meetings Facilities	30							3	3	1	1									123	
Other	Other Tourism Resources	Agri-Tourism	12							3	2	1	1									124	
		Airport	1					1		3	3	0	0										125
		Highland Cinema	1		1			1		3	2	2	0										126
		Insert Text Here																					127
		Insert Text Here																					128

KEY

OPPORTUNITIES

Resource Opportunities

- 3 Abundant resource opportunities
- 2 Moderate resources opportunities
- 1 Limited resource opportunities
- 0 No resource opportunities

Attractions

- 2 Core Attractions
- 1 Supporting Attractions

On-Theme Activities

- 1 On-Theme activities available

Underdeveloped Assets

1 Core Attractions

Group Travel?

1 Resources support Group Travel

Packaged?

1 Resource experience is packaged with others

MARKETS

EXISTING

- 3 Heavy use demand
- 2 Moderate use demand
- 1 Limited use demand
- 0 No use demand

POTENTIAL

- 3 Strong market attraction for this activity
- 2 Moderate market attraction for this activity
- 1 Weak market attraction for this activity
- 0 No market attraction for this activity

DESIRED

- 3 Strong desire to attract as a primary market
- 2 Moderate desire to attract as a primary market
- 1 Limited desire to attract as a primary market
- 0 No desire to attract as a primary market

Space has been provided below for any comments or notes pertaining to items in the matrix. Write the comment key number in the left column to link your comment to the appropriate item.

Key No. Comment

No. List

Sources:

Insert text here

APPENDIX 4
Outline of City of Kawartha Lakes Heritage Sites



OUTLINE OF HERITAGE SITES

Living History Sites/Events

- Kawartha Settlers Village
- Boyd Museum
- Maryboro Lodge
- Swing Bridge – Fenelon Falls (still operational)
- Model Railroad Association
- Kinmount Rail Station – excellent example of rail history to life
- Settlers Days – Kawartha Settlers Village
- Pioneer Days – Omemee
- Pioneer Days – Coboconk

Significant Local Heritage Sites

- Grain Elevator – Pontypool
- Kirkfield Lift Locks
- Bobcaygeon Locks (first on TSW)
- Coboconk Jail
- Fenelon Rail Station
- McKenzie House
- Carew House
- Kinmount Rail Station
- Austin Saw Mill
- County Jail
- Boyd Estate grounds
- Fenelon Swing bridge
- Rainbow Bridge – Lindsay
- Log House – Lindsay
- Lindsay Armouries
- Lindsay Library
- Lindsay Town Hall
- Lindsay Fire Hall
- Old Mill – Lindsay
- Memorial park train
- Coronation Hall
- Omemee lagoon bridge
- North iron bridge piers – Lindsay
- Academy Theatre
- Heritage House – Fenelon Falls
- Oak Street district – Fenelon Falls
- Masonic Lodge – Fenelon Falls
- Indian Point – Coboconk
- Goose Lake Indian Reserve grounds
- McDonnell Park – Lindsay
- Sturgeon Point Wharf

Museums

- Beaverton Eldon Thorah Historical Society
- Kirkfield Historical Society
- Victoria County Historical Society
- Kawartha Settlers Village
- Boyd Museum
- Horseless Carriage Museum
- Maryboro Lodge
- Kinmount Historical Society
- Manvers Historical Society and Museum
- Rock and Roll Museum
- Shedden Historical Society
- Highlands Cinema and Museum

Natural Heritage

- Ganaraska Forest
- Pigeon Creek
- Somerville Forest Tract
- Pontypool Forest Tract
- Emily Tract
- Alberg Reserve
- Carden Plain
- Ken Reid Conservation Area
- Fleetwood Creek Conservation Area
- Queen Elizabeth Highlands Park
- McLaren's creek
- Carden Alvar
- Fenelon Gorge
- Limestone Kilns – Coboconk
- Burys Green Geodetic monument (highest point in CKL)
- Victoria Falls
- Emily Provincial Park
- Kirkfield Quarry
- Road 24 (was old rail line)
- Various walking trails that were rail lines

** List as provided by Victoria Heritage, July 2008*

APPENDIX 5
City of Kawartha Lakes
2007 Mayor Festivals and Events



2007 MAJOR FESTIVALS AND EVENTS

January/February

Annual Family Run, Kawartha Lakes Snowmobile Club

March

Arts Week 2007, Academy Theatre, Lindsay

April

The 33rd Annual Lindsay Model Railway Show, Lindsay

Rolling Hills Studio Tour, Bethany

May

Fenelon Falls 23rd Annual Home, Cottage Show, Fenelon Falls

Lilac Festival and Open House, Lilac Gardens, Lindsay

June

Unlock the Summer, Bobcaygeon

1st Annual Carden Nature Festival, Carden Plain

Fenelon Falls Country Music Jamboree, Fenelon Falls

July

Lindsay Homecoming, Downtown Lindsay

Classics on Kent and Brits in the Park, Kent Street, Lindsay

100th Celebration of the Kirkfield Lift lock, Kirkfield

Lindsay Milk Run, Lindsay Recreational Complex

Lindsay 150th Parade, Downtown Lindsay

Kawartha Scottish Tattoo, Kawartha Park at L.C.V.I - Lindsay

August

119th Annual Fenelon Fair, Fenelon Falls Fairgrounds

25th Annual Car/Truck Show and Flea Market, Fenelon Fairgrounds

Valentia 200th Anniversary Rodeo Celebrations, Valentia

Annual Craft Show, Lindsay Fairgrounds

September

18th Annual Kawartha Arts Festival, Fenelon Falls

4th Annual Doors Open, Kirkfield & Coboconk

153rd Lindsay Central Exhibition, Lindsay Fairgrounds

159th Annual Oakwood Fair, Oakwood Fairgrounds

136th Annual Kinmount Fair, Kinmount Fairgrounds

1st Annual Wine & Food Festival, Bobcaygeon

149th Annual Bobcaygeon Fall Fair, Bobcaygeon Fairgrounds

5th Annual Farmfest, City of Kawartha Lakes

Windows on Main Street, Downtown Lindsay

October

22nd Annual Victoria County Studio Tour, City of Kawartha Lakes

November

10th Annual Festival of Trees, Kawartha Settlers Village, Bobcaygeon

Fenelon Falls Santa Day, Fenelon Falls

December

Annual Candlelight Downtown Tour, Downtown Lindsay