Peterborough & the Kawarthas

PREMIER-RANKED TOURIST DESTINATIONS PROJECT

# FINAL REPORT

## June 24, 2007

**Prepared by**

**BRAIN TRUST**

**MARKETING & COMMUNICATIONS**

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# ACKNOWLEDGEMENTS


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# BACKGROUND

The Premier-ranked Tourist Destination Framework (PrTDF) was an initiative developed by the Ontario Ministry of Tourism in 2001. The goal of the PrTDF program is to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage and ultimately improve to become a destination of choice. Being a *Premier-ranked Tourist Destination* indicates that "here is a place more attractive than the rest, a place the potential tourist visitor should consider first in making travel plans." To be clear, *Premier-ranked* is not a formal tourism designation but rather is an internal tourism goal for a destination to work towards as it relates to becoming "better than the rest".

To assist municipalities with assessing and developing their tourism product, the Ministry of Tourism established a tool called the Premier-ranked Tourist Destinations Framework. This framework assists jurisdictions in assessing their tourist assets, attractions and amenities and allows them to identify opportunities in tourism development. The Ministry of Tourism provides financial assistance to regions that successfully apply to undertake the PrTDF process.

Many regions and cities in Ontario have completed PrTDF projects including the Regional Municipalities of Halton, Niagara, York, Prince Edward County, Muskoka and Durham. The cities of Mississauga, Hamilton, Cornwall, Brockville, Kingston, Gananoque and Toronto have also completed their PrTDF assessments along with many others. Most have used the results of their studies in the development of comprehensive tourism product development plans.

The Peterborough & the Kawarthas PrTDF project is an initiative facilitated by the Greater Peterborough Area Economic Development Corporation (GPA EDC), the Ontario Ministry of Tourism, Ministry of Training, Colleges & Universities (MTCU), and tourism industry stakeholders. The funding for the project came from MTCU, the Government of Canada, and the Ontario Ministry of Tourism.

The successful implementation of the recommendations is based on a thorough understanding, appreciation, engagement and endorsement from both the private and public sector partners. This is not an initiative of government, at any level. It is a shared process undertaken by industry and government, both must accept the accountability for delivery if it is to be viewed as productive over the long term.

Through funding from MTCU, contract staff was hired to assist in the development and completion of the PrTDF resource audit.

The resource audit was carried out in the form of a detailed survey of establishments in Peterborough & the Kawarthas which asked respondents to describe their operations, services offered, customer base and tourism awareness among others.
The survey was mailed to establishments from the accommodations, food and beverage, attractions, arts and culture, outdoor recreation, events, planning, heritage and retail sectors. Survey results were compiled in a comprehensive database maintained by the Audit Team.

The tourism consulting firm BRAIN TRUST Marketing & Communications was retained in December 2007 to assist with the analysis of the audit results and preparation of the final report.

The consultant worked with the GPA EDC staff, PrTDF project team and the PrTDF Community Champions to review the results, assess current industry strengths, weaknesses, attributes, product/service gaps, factors and conditions that impact existing and future development plans and also identify potential opportunities and partnerships within the tourism industry. Based on feedback and comments received from the Champions and the industry at the following sessions, recommendations for inclusion in the final report were developed.

# PROJECT PROCESS

| | |
|---|---|
| January 2007 | GPA EDC receives approval to undertake the Premier-ranked Tourist Destinations Framework initiative |
| January 2007 | MTCU and The Ministry of Tourism agree to fund the PrTDF Initiative, hiring process began |
| June 2007 | Project staff hired, teams worked to build database of tourism stakeholders and prepare survey (a year long project began) |
| August 20, 2007 | Initial meeting with Community Champions |
| September 2007 | Industry Surveys mailed out |
| Oct. – Dec. 2007 | Surveys returned, data entered |
| December 2008 | Hired Consultant – BRAIN TRUST Marketing & Communications to analyze findings, facilitate validation process with the industry, make observations, identify recommendations and prepare the final report |
| January 4, 2008 | Consultant meets with senior staff and research team to identify project parameters and agree on work plan and deliverables |
| February 2008 | Final Survey Collection complete, Resource Audit and Opportunity Matrix data collection complete |
| February 26, 2008 | Community Champions meeting and project status up-date |
| March 2008 | Consultant analyses workbook measures, receive input from Supervisor, research team, senior tourism staff |
| April 28, 29, 2008 | Industry consultation meetings: Keene and Buckhorn to review initial findings and garner feedback and validation of work done to date, groups endorsed the observations to date |

| | |
|---|---|
| May 22. 2008 | Recommendations presented to Community Champions and Staff for validation and endorsement, recommendations endorsed |
| June 2008 | Consultant presentation of Final Report to GPA EDC Board |
| August 2008 | Presentation to City and County Councils |
| September 2008 | Public Community presentation |

It can be safely said that, as a result of this consultative process, the tourism industry in Peterborough & the Kawarthas have endorsed the recommendations contained in this report. It is the culmination of many hours of diligent work, dialogue and discussion. This report contains key recommendations that if implemented, will have a positive impact on all of those who live, work and visit Peterborough & the Kawarthas.

# INTRODUCTION

## What is the Premier-ranked Tourist Destination Framework?

The Premier-ranked Tourist Destination Framework was developed by the Ontario Ministry of Tourism to provide a framework for tourism destinations across Ontario to define their competitive position within the tourism marketplace.

> **"Premier-ranked is defined as:**
> ***"A place more attractive than the rest, a place the tourist should consider first when making travel plans."***

The Ministry of Tourism developed a resource audit and workbook format that outlines the attributes/factors/conditions that are considered prerequisites for a tourist destination to be considered serious in building the economic well being of its destination. Meeting these requirements is essential in order to grow tourism revenues for the destination and its tourism shareholders.

The workbook format provides a simple methodology that communities can follow to ensure consistency, accuracy, and maximum involvement of the key 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 – not necessarily in competition with other operators, but in a complementary context within that particular destination.

It should be noted that being, or moving to being ***Premier-ranked IS NOT an official designation or grading***. It is simply a process designed to help destinations improve in their viability and competitiveness as a place visitors want to visit.

The PrTDF is completed using a Workbook that asks specific questions about the destination using a simple methodology. Completion of the workbook is done by sourcing all possible relevant tourism statistics and information. The sources of this information include but are not limited to, the Ministry of Tourism data and various regional reports along with information gathered by the Destinations' research team in a detailed Resource Audit.

The Workbook serves as a manual that:

1) Captures the attributes/factors/conditions considered necessary for a tourist destination to be perceived as a Premier-ranked Tourist Destination;
2) Identifies weaknesses and gaps that must be addressed;
3) Identifies strengths and opportunities that might be used to create sustainable competitive advantage; and

4) Provides a focus for building an expanded network of tourism stakeholders and consensus on future priorities for action.

The Resource Audit is made up of four components:

1) Conducting a **Tourism Industry Survey**.
   This component of the framework allows a destination to engage the tourism industry stakeholders and to acquire a snapshot of their current product and performance and understand their plans for future development.
2) Competition of the **Tourism Resource/Opportunity Matrix**.
   The opportunity Matrix looks at 123 opportunities in the areas of:
    1) Water-based Recreation Opportunities;
    2) Land-based Recreation opportunities;
    3) Land and Water-based opportunities;
    4) Natural Resource Opportunities;
    5) Cultural and heritage Resource opportunities;
    6) Built Recreation/Commercial Infrastructure.
3) A **Travel Trade Resources Checklist**.
4) A **Transportation Resources Checklist**.

## PURPOSE FOR THE PrTDF IN PETERBOROUGH & THE KAWARTHAS

By undertaking the PRTDF project the leaders in Peterborough & the Kawarthas tourism industry are indicating a desire to move their destination to the next level. Through the GPA EDC the industry will have an accurate assessment of the destinations strengths and deficiencies and more importantly a clear plan for improvement. The project will help address the key issues identified in the GPA EDC 2006 – 2010 Strategic Plan as stated below:

In going forward, the key issues we must address are:

- To improve communication of our region's brand, an important part of this effort being to better define where and what is the Peterborough & the Kawarthas Region
- To improve stakeholder cooperation, mutual trust, improve communication, coordination, and partnerships among communities in our region
- To research and develop a reliable information "database" to support our future priorities
- To educate and inform ourselves regarding the range of attractions in our region, develop a pride and knowledge about our region among all stakeholders, enable mutual promotion across the region and develop marketing packages (e.g. interest-specific activity packages to encourage tourists to stay longer and spend more)
- To attract increased tourism-related investment to our region, to increase accommodation availability, variety and to expand and improve attractions
- To attract greater government funding, acknowledgement and support for increased tourism promotion effort and brand-awareness

The PrTDF process allows Peterborough & the Kawarthas to analyze base data, benchmark areas of improvement for the future and work more collaboratively towards a visitor/customer-first philosophy in destination development in attracting and retaining tourists to its community. It sheds light on development, infrastructure, training and investment needs. The process defines the destination's strengths, product clusters and identifies our major trip motivators and markets as well as opportunities to work collectively with all involved in tourism. The process in itself was deemed to be an opportunity to foster greater communication, networking and industry relations within the tourism sector, business community and with several levels of government.

# PRODUCT, PERFORMANCE AND FUTURITY, THE THREE ASSESSMENT MEASURES

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

| | |
|---|---|
| **THE PRODUCT DIMENSION:** | ***A Premier-ranked Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:***<br>A. Distinctive Core Attractions;<br>B. Quality and Critical Mass;<br>C. Satisfaction and Value;<br>D. Accessibility; and,<br>E. An Accommodations Base. |
| **THE PERFORMANCE DIMENSION:** | ***The quality of the tourist experience and the destination's success in providing it is validated by:***<br>F. Visitation<br>G. Occupancy and Yield; and,<br>H. Critical Acclaim;, |
| **THE FUTURITY DIMENSION:** | ***The quality of the tourist experience and the destination's success is sustained by:***<br>I. Destination Marketing;<br>J. Product Renewal; and,<br>K. Managing within Carrying Capacities. |

## PrTDF Process

The PrTDF has been designed in a three stage process of evaluation, interpretation and planning. These stages and their respective steps are:

# EVALUATION:

*Step 1 - Complete the Resource Audit;*
*Step 2 - Measure destination Product;*
*Step 3 - Measure destination Performance;*
*Step 4 - Measure destination Futurity.*

# INTERPRETATION:

*Step 5 - Complete the destination Performance Summary;*
*Step 6 - Report Observations from PrTDF Process*

# PLANNING:

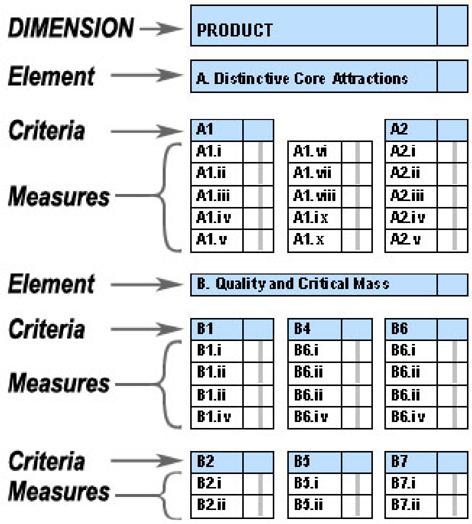
*Step 7 - Determine the next steps in tourism development for the destination.*

# EVALUATION PROCESS

Peterborough & the Kawarthas performance is assessed by a series of measures specific to the Product, Performance and Futurity dimensions of the destination. The first part of the measure is in the form of a statement, found in the PrTDF Workbook, with an implicit question asking whether you can affirm the statement as *"true"*, *"almost true"* or *"not true yet"* for the destination. It is answered with a *"Yes"*, *"Almost" ("A")* or *"No".* The second part asks for the facts that substantiate the answer to the first. The responses to the questions are recorded with a check mark in the appropriate box (Yes, "A" or No) on the work page, and transferred to the Performance Summary Form provided in the Workbook.

The Performance Summary Form (Appendix C) displays the logical structure of the Framework. Being a "Premier Ranked Tourist Destination" requires success across the Product, Performance and Futurity Dimensions. As illustrated below, each dimension is supported by Elements, denoted by the letters A to K. Each element has a series of consecutively numbered Criteria as in A1, A2 etc. Each criterion is supported by Measures, denoted by lower case roman numerals. As an example, the Product dimension's element A - Distinctive Core Attractions has two criteria, A1 and A2.

The first Element of "A" has ten measures, the second has four. Element B - Quality and Critical Mass has seven criteria, each of which has two to four measures.




# COMPLETING THE RESOURCE AUDIT

Completion of the Resource Audit was the first step in the destination assessment process. The Audit relied on the following four supporting tools:

1) Tourism Industry Survey;
2) a Tourism Resource/Opportunity Matrix;
3) a Transportation Resources Checklist and;
4) a Travel Trade Resources Checklist.

# TOURISM INDUSTRY SURVEY

Industry Surveys were sent out to 917 businesses who are involved in providing tourism experiences and/or products or services to visitors. By removing the businesses that were determined to be closed and those who felt they were not a tourism related business, the true survey quantity was 644. A core survey was sent to all businesses and 13 different additional surveys were sent, depending on the type of business. These additional surveys had more specific questions, and were aimed at specific sectors, as follows:

- Accommodations
- Adventure Providers / Outfitters
- Agri/tourism
- Attractions (Cultural, Historic, Natural, Sports)
- Festivals & Events
- Food & Beverage
- Golf
- Marinas
- Parks & Trails
- Retail
- Skiing & Snowboarding
- Tours & Excursions
- Wineries & Breweries

452 of the 644 businesses responded creating a very healthy response rate of 70%. The following chart shows response numbers by industry sector. The data collected in the surveys was entered into a database and aggregate results were used in the PRTDF analysis. The response rates by sector are illustrated in the chart below.

| | Core | Accommodations | Adventure & Outfitters | Attractions | Festivals & Events | Food & Beverage | Golf | Marinas | Parks & Trails | Retail | Skiing & Snowboardin | Tours & Excursions | Wineries & Breweries | Agri/ Tourism |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Surveys Distributed** | 917 | 202 | 59 | 137 | 197 | 299 | 22 | 38 | 45 | 580 | 12 | 37 | 6 | 18 |
| **Business Closed** | 135 | 35 | 7 | 14 | 15 | 38 | 5 | 8 | 6 | 68 | 1 | 0 | 1 | 5 |
| **No Tourism Impact** | 138 | 5 | 4 | 16 | 28 | 33 | 2 | 1 | 0 | 93 | 0 | 2 | 2 | 2 |
| **True Survey Quantity** | 644 | 162 | 48 | 107 | 154 | 228 | 15 | 29 | 39 | 419 | 11 | 35 | 3 | 11 |
| **Completed Surveys** | 452 | 130 | 9 | 70 | 61 | 99 | 10 | 22 | 15 | 172 | 1 | 17 | 1 | 4 |
| **Percentage Received** | 70% | 80 | 19 | 66 | 40 | 43 | 67 | 76 | 38 | 41 | 9 | 49 | 33 | 36 |

Source: PrTDF Survey - 2007

# TOURISM RESOURCE/OPPORTUNITY MATRIX

The Tourism Resource/Opportunity Matrix was used as a tool to guide consideration of the asset base and the resources contributing to the current market penetration of the tourist destination area. Ultimately, the geographic markets from which it is reasonable to expect future visitation to occur are revealed. It is also used as an aid to identifying product gaps and opportunities for future product development and as a summary reporting form.

# THE TRANSPORTATION RESOURCES CHECKLIST

The Transportation Checklist was completed by the project team using information gathered from local sources. The Checklist can be found in Appendix A.

# THE TRAVEL TRADE RESOURCES CHECKLIST

The Travel Trade Resource Checklist was completed by the project team. The Checklist can be found in Appendix B.

# EVALUATION RATINGS

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

The symbols are as follows:

● **Yes:** *the affirmation can be made and supported for the destination*

◗ **Almost:** *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 for the destination*

# STARTING FROM A POSITION OF STRENGTH

Peterborough & the Kawarthas has a number of tourism assets in which to build and enhance its performance in the tourism marketplace. Several of these assets have critical acclaim and currently stimulate tourism to the area. These assets include:

- Recognized destination with known assets, a history in tourism and business owners who desire to get to the next level
- Notoriety on a number of fronts
- A number of destination development initiatives "already in the works"
- A tourism market from which to draw - 8 million people within 3 hours
- 2.0 million + annual visits to the destination
- A significant base of cottagers who regularly visit the destination some for extended periods of time
- Several well known events that attract renowned performers and entertainers
- The Trent-Severn Waterway, a significant part of the province's history and an attractive addition to the tourism menu
- GPA EDC – an organization committed to positively impacting the health and well being of all those who live, work and visit Peterborough & the Kawarthas

# PRODUCT

The PRODUCT element's criteria and measures address the features that enable a destination to offer a high quality tourist experience.

**Evaluation Rating for Peterborough & the Kawarthas** ◗ **Almost**

***Out of 58 measures, 28-yes, 14- almost and 16- no***

***Product*** *components, criteria and measures address the features that enable a destination to offer high quality tourist experiences enabled through the destination's offerings of:*

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

The following product characteristics reveal Peterborough & the Kawarthas product attributes:

# DISTINCTIVE CORE ATTRACTORS

*This section assesses what it is about a destination that makes it stand out as distinctive, how the attractors are distinguished and how they are relevant to market wants. The evaluation process has identified Peterborough & the Kawarthas' core 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*

**Definition - Core Attractor:** The features, facilities, and/or experiences which act as the primary motivators for most travel to the destination; the attractors with the most tourist visits in the destination. Core attractors can differ from season to season, for example golf vs. skiing at a four seasons resort destination. They can overlap or be distinctly different and appeal to differing visitor segments, e.g., taking in a concert at the Festival of Lights vs. attending a corporate meeting at one of the several resort conference facilities ; or mass vs. niche segments, e.g., visiting the Peterborough Lift Lock vs. attending a performance of a local dance troupe.

A core attractor can also be a cluster of assets all relating to a specific theme, e.g., dining, shopping, entertainment and night life in downtown Peterborough; or an experience enabled by clustering, e.g., visiting Lang Pioneer Village combined with a cruise on the Trent-Severn Waterway.

**Definition - Supporting Attractor:** The features or facilities of a destination that enhance an experience to the area by giving additional but secondary reasons to visit. Supporting attractors can be primary travel motivators (i.e. core attractors) to some markets (typically niche segments). They are generally distinguished from core attractors by their smaller number of visitors.

**Peterborough & the Kawarthas Core Attractors:**

- Heritage and Cultural Experience Cluster
- Outdoor Recreation Experiences Cluster
- Water Based Experiences Cluster
- OLG Slots at Kawartha Downs
- Peterborough Summer Festival of Lights
- Havelock Country Jamboree
- The Peterborough Lift Lock

## Heritage and Cultural Experience Cluster

The Heritage and Culture cluster offers visitors a wide variety of experiences designed to entertain and enrich. Anchored by several specific attractions and annual events Peterborough & the Kawarthas' rich heritage and culture can be experienced throughout the entire region on a year-round basis. These experiences speak to the historic significance of the area as well as the diverse make-up of its people. Experiences may be enjoyed by touring the area or by attending a specific site or performance. Most of the attractors are located in close proximity to a variety of visitor services including accommodations, food and beverage and retail establishments.

- ***Heritage*** - Petroglyphs Provincial Park, The Canadian Canoe Museum, Lang Pioneer Village, The Lift Lock, Local and Aboriginal Heritage Sites
    - 7 National Historic Sites and Sites of Significance
    - 20 Provincial, 76 Local, 5 Aboriginal Heritage Sites
    - 3 Living History Sites

- ***Cultural*** - annual music / non-music festivals, Special Events, Museums, Art Galleries, Live Theatre and Musical Venues
    - 13 Music Festivals, 38 Non-music Festivals, 40 Special Events and Celebrations, e.g. *Buckhorn Fine Arts Festival*
    - 9 Museums, 29 Art Galleries, 5 Performing Arts Venues (250- 4000 capacity)

## Outdoor Recreation Experiences

Outdoor recreation has played a large part in the make-up of Peterborough & the Kawarthas' tourism products and experiences for many years. It is at the heart of the destination and the reason the destination has attracted so many seasonal home owners. The variety of outdoor recreation options available provides the visitor an almost endless list of things to see and do in and out of season. There are features and activities that cover a spectrum of mass and niche interests and appeals. These experiences are enjoyed by people of all ages and throughout the calendar year. Most of the outdoor recreation experiences are located in close proximity to a variety of visitor services including accommodations, food and beverage and retail establishments.

- 14 Road Bike Routes and 8 Mountain Bike Trails
- 28 Day Hiking Opportunities
- 5 Equestrian Centres
- 4 Hunting Outfitters – large / small game
- 5 Provincial Parks (2 with camp sites), 20 Conservation Areas
    - 4577 Camp / RV sites
- 18 Golf Courses
- 11 Birding and 14 Natural Viewing Sites
- 6 Snowmobile Clubs, 2170 km of trails
- 11 Snowshoeing, 16 Cross Country Ski Locations

### Water Based Experiences

Many Ontario destinations offer visitors water based experiences but in Peterborough & the Kawarthas water plays a foundational role in much of what the destination offers guests. The physical geography of the area including the vast amount of lakes, rivers and streams provides a significant number of water based experiences for all to enjoy, primarily in the warm weather months of the year. The Trent-Severn Waterway provides unique water based experiences, it is one of the reasons the destination receives significant notoriety. Guests can access the water in any number of ways. The long list of water based accommodations provides perhaps the most appealing opportunities to experience the area's rich variety of waterways. These facilities are located throughout the entire region and several are open year-round.

- Opportunities for kayaking, canoeing, sport fishing, boating and swimming
- 134 lakes, 49 public access points and 43 marinas
- 85 Cottage resort/rental and 11 Resort/Lodge properties, majority on the water offering over 1000 combined rental units, both short and long term
- Trent Severn Waterway
    - National Geographic's Top 500 trips on the planet
    - Designated National Historic Site of Canada
- 25% of all visits to the region are motivated by a water-based experience

The area is well known for its sport fishing. In and of itself sport fishing could be considered a demand generator. A significant number of accommodation based operators rely heavily on offering guest sport fishing based opportunities. Visitors travel great distances to experience the wonderful fishing opportunities that are available and many come back year after year creating a significant economic impact for the entire area.

- Sport Fishing - 202,752 visits for purpose of fishing in 2004
        - 162,080 visitors from Ontario
        - 28,311 U.S. visits
    - Variety of fish - quality/quantity of species
        - 11 species of game fish
        - Many lakes with notoriety for Muskie, Walleye, Bass
        - Rice Lake walleye anglers generate over $50 million in economic activity
    - $1.5 Million spent on Fishing Licenses in 2007, 7 Charter/Guiding services

### OLG Slots at Kawartha Downs

Positioned as *"the perfect pit stop en-route to Kawartha Lakes"* the OLG Slots at Kawartha Downs, offers visitors the excitement of a first class gaming experience.

- Over 375 slot machines
- 800,000 visitors last season. Visitors stay on average 1-2+ hours
- 67,947 visitors to Peterborough County with main purpose to visit the casino (2004 CTS/ITS)
- Visitor spending $116,302,393 (2007 TRIEM)
- Origin of visitors:
  - 40% Local,
  - 40% Regional
  - 12% Provincial
  - 2% USA near border

### Peterborough Summer Festival of Lights

An annual highlight of the summer calendar is the Peterborough Summer Festival of Lights. It has been attracting audiences from near and far for 22 years. It regularly presents a long list of renowned performers who entertain and excite people of all ages. Presented at the grandstand stage at Del Crary Park, located on the shores of Little Lake, the festival generates considerable economic impact for the entire region. Its impact is in part a result of the extended run the festival enjoys throughout the months of June, July and August where performances are staged in the evenings twice per week.

- Performers such as Gordon Lightfoot, Tom Cochrane and Blue Rodeo
- June 21st – August 23rd - twice a week (Wednesdays and Saturdays)
- 140,000 visitors in 2007
- Origin of visitors:
  - 40% local
  - 20% regional
  - 20% provincial
  - 20% national / international
- Visitor Spending $6,251,000 *2006 TRIEM
- Total taxes generated $3,230,144* of which $259,755 were for the municipality

### Havelock Country Jamboree

This unique festival has been dazzling audiences for 19 years and has attracted some of North America's most notable country music performers. The event has received much notoriety and delivers significant economic contributions to the entire region.

- Country music headliners from Nashville, other parts of the U.S and Canada.
- Nominated 8 times by the Canadian Country Music Association as Canada's top country music festival
- 100,000 visitors in last full season
- 4 day event held in August with a 19 year history

- Origin of visitors:
  - 25% Local
  - 40% Regional
  - 25% Provincial
  - 5% National
  - 5% U.S. / Intl.
- Visitor spending $16,104,602 *2007 TRIEM

### The Peterborough Lift Lock

The Peterborough Lift Lock is part of the famous Trent-Severn Waterway system. It opened on July 9, 1904 and remains to this day a visible part of Peterborough's landscape. Lock 21 is the highest hydraulic lift lock in the world, and guests learn about it and the TSW at the Visitor Centre from May to September.

- 2007 Visitation
  - 119,000 land based visitors, (126,000 in 2004)
  - 23,212 Visitor Centre guests (24,630 in 2004)
- Origin of visitors:
  - 88% from Ontario
  - 66% of those from Central Ontario

### Supporting Attractions

- Dining Experiences – 17 Fine Dining restaurants, 158 mid-priced restaurants, 30 cafés, 96 fast food restaurants
- Shopping Experiences
- Accommodation options – 46 campgrounds, 85 cottage rental properties, 53 B&B's, 11 resort lodges, 5 mid market motels, 6 up market hotels
- Festivals – 13 musical, 38 non-musical, 40 special events / celebrations
- A variety of seasonal Farmers Markets
- Fairs (Peterborough Exhibition, Norwood Fair, Kinmount Fair, etc.)
- Art Studio Tours
- Small Town Rural Experience (Driving Tours)

### More about the Distinctive Core and Supporting Attractors

**A1.** The Destination offers distinctive core attractors which are linked to the physical setting and / or history?

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | A Resource Audit has been completed | ✔ | | |
| ii. | The Audit distinguishes between core and supporting attractors | ✔ | | |
| iii | The core attractors motivate tourist travel to the destination<br>✔ On their own *and* ✔ As part of a regional complex | ✔ | | |
| iv | Opportunities to build on complementary tourism attractions/activities have been assessed. | ✔ | | |

| | | | | |
|---|---|---|---|---|
| v | The core attractors are linked to the physical setting | ✔ | | |
| vi | The core attractors are linked to the history | ✔ | | |
| vii | Other destinations with competitive or similar offerings have been identified | ✔ | | |
| viii | The destination is considered to stand out from its competition | | ✔ | |
| ix | The destinations offering is superior because it offers a better guest experience | | | ✔ |
| x | The Destination has a product positioning statement | | | ✔ |

Peterborough & the Kawarthas' distinctive core attractors and supporting attractors are part of a regional complex linked to the physical setting and history of the area.

The regional complex known as *"Peterborough & the Kawarthas"* includes the City of Peterborough, North Kawartha, Galway-Cavendish-Harvey, Smith-Ennismore-Lakefield, Cavan North Monaghan, Otonabee-South Monaghan, Asphodel-Norwood, Havelock-Belmont-Methuen and Douro Dummer.

- The northern third of the region is where a majority of the Lakes are located, and is largely wooded with mixed coniferous and deciduous forest. The "middle third" of the region is where most of the larger lakes can be found. These lakes are connected by a lock system, and are also key elements of the Trent-Severn Waterway system. The Southern third of the region is primarily agricultural and includes a number of towns and villages.

Peterborough & the Kawarthas is bounded by:
- City of Kawartha Lakes - West,
- Hastings County - East,
- Rice Lake & Northumberland County - South
- Durham Region - in South West Corner
- Haliburton County - North

*The physical linkage arises from:*

There is a definite connection between the identified Core Attractors and the physical setting of the destination. The core clusters, Water Based Experiences and Outdoor Based Recreation Experiences, and Historical and Cultural Experiences are all closely intertwined with the physical setting. For example, Boating and Fishing could not take place on the scale and in the quality that it does if Peterborough Region were not home to the vast number of lakes, with ample access points through public launches and marinas.

Land Based Outdoor Recreation Opportunities are also closely related to the diverse physical settings offered by the distinct geographical regions of Peterborough Region. Hiking, Hunting, Camping, Biking, etc. all rely on the physical setting which the activity takes place in. This includes natural, and "wilderness" settings and the more heavily populated areas in the central and southern parts of the Region. Even stand-alone attractors are tied to the physical setting, mainly due to where the event or structure is located.
For instance, the Peterborough Summer Festival of Lights, and the Havelock Country Jamboree are both large outdoor festivals, whose settings are contributors to the enjoyment of the experience.

*The historical linkage arises from:*

There is linkage between Core Attractors and the history and culture of Peterborough & the Kawarthas. Water based experiences are connected to the number of seasonal second homes and properties that have existed for many years. As well there is a connection to vacation boating, fishing and historical travel routes in the chain of lakes that makes use of the Trent-Severn Waterway (TSW). The Peterborough Lift Lock is a highlight of the TSW, it is also unique being the largest of its kind in the world, a significant engineering feat for a project that was completed in 1904.

Local historic sites are spread throughout the region. These sites include plaques commemorating people and events that have shaped the fabric of the local history, most have local, provincial, or national significance. There are 7 sites with national historic significance, 20 with provincial historic significance and 72 sites have been designated as architectural heritage sites.

As part of the heritage cluster, there are a number of historic attractions. Among the most significant is The Canadian Canoe Museum. Peterborough is the natural and obvious location for this museum as it was the home of one of the best-known canoe manufacturers in the history of the vessel, The Peterborough Canoe Company.

While core attractors offer *collective appeal* there are other destinations that offer similar products and experiences. The nearest such destination(s) and their distance from the subject destination are:

| Competitive Destination | Distance (km) from Peterborough | Distance (km) From GTA |
|---|---|---|
| City of Kawartha Lakes -Lindsay | 43 | 134 |
| Northumberland County - Port Hope | 43 | 108 |
| Haliburton County - Haliburton | 100 | 216 |
| Gananoque – Thousand Islands Charity Casino | 140 | 180 |
| Orillia - Casino Rama | 128 | 150 |
| District of Muskoka - Huntsville | 200 | 220 |
| Ottawa Valley - Carleton Place | 219 | 351 |
| Bruce County - Owen Sound | 307 | 190 |

On some aspects Peterborough & the Kawarthas does stand out from the competition.

- The Trent-Severn Waterway
- Exceptional water / water-related activity opportunities
- Natural beauty in terms of forests, nature and trails
- Unique attributes such as Peterborough Lift Lock, Petroglyphs Provincial Park, Serpent Mounds Park, The Canadian Canoe Museum, Lang Pioneer Village
- A significant population of seasonal residents (cottage owners)

In comparison to our competition, the unique combination of: abundant outdoor recreation opportunities (on both land and water); rich, well preserved and documented history; a variety of large and small scale cultural experiences in food, music and events make Peterborough &

the Kawarthas an attractive destination. These features combined with the destination's close proximity to the GTA make it a strong competitor.

In terms of guest experience and offering good value, the destination does not have a region-wide guest surveys program. Therefore we cannot affirm that the experience guests receive when visiting is superior. Some individual operators track satisfaction levels of guests but do not regularly share this information.

In terms of a Product Positioning, Peterborough & the Kawarthas does not have a statement that it uses in its advertising and promotional material that "positions" the destination in the minds of the visitor market. In the past phrases such as "Simply Brilliant" and "Land of Shining Waters" were used.

## A2. Attractions are relevant to the expectations of identified market segments.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The Resource Audit classifies destination resources and their appeal to Regional, Provincial, National/US and International geographic market segments | ✔ | | |
| ii. | Core attractions are relevant to a tourist market base The base is considered to be a mass and niche market | ✔ | | |
| Iii | Attractions appeal to guests from beyond Ontario's borders. | | | ✔ |
| Iv | The market segments for whom the identified attractions are expected to have a compelling appeal have been identified. | ✔ | | |
| V | A **core attraction**, or set of complementary attractions pull visitation from all segments on a year-round basis. | | | ✔ |

The destination does have appeal to a variety of market segments from a wide geographic area.

| **Geographic origin of guests as reported in the Resource Audit** | |
|---|---|
| | **Average % across all sectors** |
| Local | 43% |
| Regional | 22% |
| Provincial | 22% |
| National | 5% |
| US Short Haul | 7% |
| US Long Haul | 4% |
| International | 4% |

PRTD Survey, January 2008

Peterborough & the Kawarthas' tourism base is represented by:

- Primarily Ontario residents: 17% from Metropolitan Toronto
  15% Durham Region
- Average age of 36.4 Years: 21% aged 55+
  17% aged 35-44

| | | |
|---|---|---|
| | | 16% aged 45-54 |
| • | Travel purpose: | 53% Pleasure Trip |
| | | 39% Visit Family and Friends |

Peterborough & the Kawarthas' products and experiences have both "mass" and "niche" appeal and provide visitors a wide variety of things to see and do.

| Mass | Niche |
|---|---|
| Water Based Activities | Hiking |
| Outdoor Recreation | Cycling |
| Attend a Festival/Event | Boating |
| Fishing (as a past time) | Fishing (avid) |
| Shopping | Birding |
| Sightseeing | Hunting |
| Historic Attractions | Attend Festival/Event |

The tourist market base for the destination's core and supporting attractors do appeal to a broad range of market segments. The Ontario Tourism Marketing Partnership Corporation (OTMPC), for the purposes of marketing, has refined the primary markets for Ontario into four segments: Upscale Adventurers, Provincial Families, Young Go-Go's and Retired Roamers.

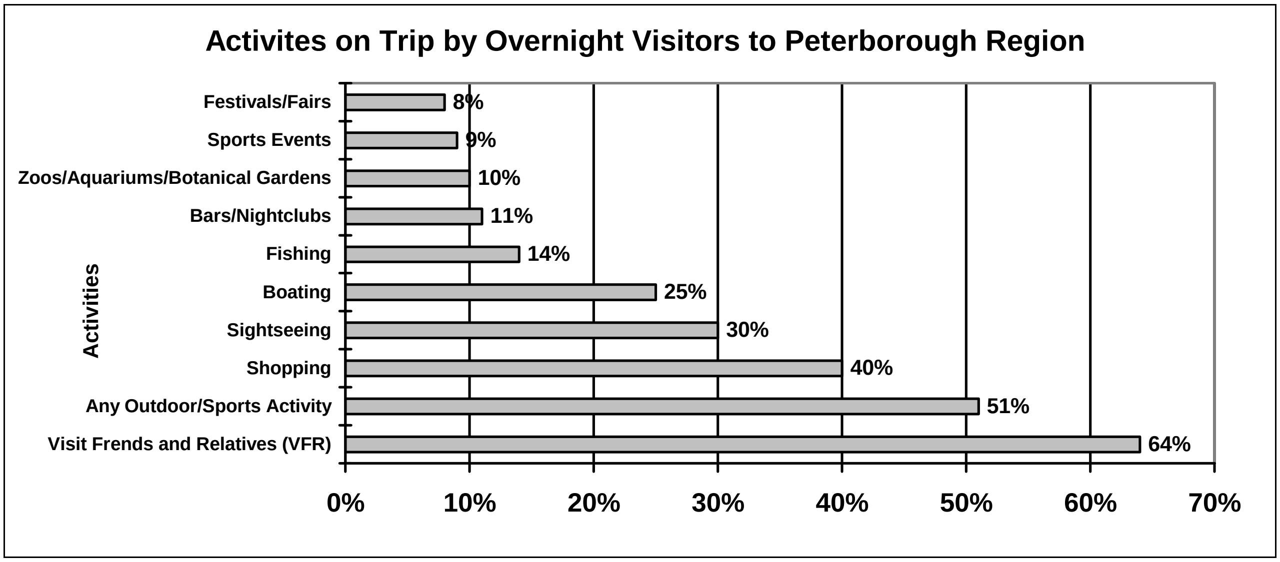
| Ontario Ministry of Tourism Market Segments | |
|---|---|
| Upscale Adventures | • Well off older middle-aged married couples with adult-age children & some empty nests<br>• Age 45-64, average household income $121,848<br>• Travel Motivations, connection, attention to detail, Aficionados, Flexibility and Technology<br>• Market Size 558,366 Ontario households |
| Provincial Families | • Well off younger and middle aged suburban and exurban families with lots of children<br>• Age 35-54, average household income $103,182<br>• Travel Motivations, Time Savers, Group Travel, Family Vacations, Status<br>• Market Size 952,610 Ontario households |
| Young Go-Go's | • Young Successful, well-off, multi-ethnic urban trendsetters<br>• Age 25-44, average household income $91,492<br>• Travel Motivations, Flexibility & Ecology, Escape, Originality, Attention to Detail<br>• Market Size 181,124 Ontario households |
| Retired Roamers | • Mid-scale mature and older retirees and seniors living in suburbia and towns<br>• Age 55+, average household income $64,838<br>• Travel Motivations, Nature, Information, Price, Nationalism<br>• Market Size 590,162 Ontario households |

Regional Tourism Profile 2007 - Ontario Ministry of Tourism Research

Attractors have appeal to the following markets:

<table>
<tr><th>Attraction</th><th colspan="2">Appeal</th></tr>
<tr><td rowspan="6">The Havelock Country Jamboree</td><td>o 25%</td><td>local</td></tr>
<tr><td>o 40%</td><td>regional</td></tr>
<tr><td>o 25%</td><td>provincial</td></tr>
<tr><td>o 5%</td><td>national</td></tr>
<tr><td>o 3%</td><td>USA near border</td></tr>
<tr><td>o 1.5%</td><td>USA long hauls</td></tr>
<tr><td rowspan="5">Peterborough Summer Festival of Lights</td><td>o 40%</td><td>local</td></tr>
<tr><td>o 20%</td><td>regional</td></tr>
<tr><td>o 20%</td><td>provincial</td></tr>
<tr><td>o 10%</td><td>national</td></tr>
<tr><td>o 10%</td><td>international</td></tr>
<tr><td rowspan="5">Peterborough Lift Lock</td><td>o 88%</td><td>Ontario</td></tr>
<tr><td>o 2%</td><td>Atlantic Canada & Quebec</td></tr>
<tr><td>o 1%</td><td>Western & Northern Ontario</td></tr>
<tr><td>o 6%</td><td>USA</td></tr>
<tr><td>o 3%</td><td>Other Countries</td></tr>
<tr><td rowspan="4">OLG Slots at Kawartha Downs</td><td>o 40%</td><td>local</td></tr>
<tr><td>o 40%</td><td>regional</td></tr>
<tr><td>o 12%</td><td>provincial</td></tr>
<tr><td>o 2%</td><td>USA near border</td></tr>
<tr><td rowspan="5">Water Based Experiences<br><br>* Fishing is considered a niche market</td><td colspan="2">Overnight Visits for Fishing and Boating</td></tr>
<tr><td>o 82%</td><td>provincial</td></tr>
<tr><td>o 10%</td><td>US</td></tr>
<tr><td>o 2%</td><td>overseas</td></tr>
<tr><td>o 6%</td><td>other Canadian Provinces</td></tr>
<tr><td rowspan="5">Outdoor Recreation Experiences<br>Outdoor Sports/Activities<br>non water based<br>For Sightseeing, National / Provincial Parks, Golf, and Hunting <u>Only</u></td><td colspan="2">Overnight Visits</td></tr>
<tr><td>o 80%</td><td>provincial</td></tr>
<tr><td>o 6.5%</td><td>US</td></tr>
<tr><td>o 6.5%</td><td>overseas</td></tr>
<tr><td>o 6.7%</td><td>other Canadian Provinces</td></tr>
<tr><td rowspan="5">Heritage and Cultural Experiences</td><td colspan="2">Overnight Visits</td></tr>
<tr><td>o 79%</td><td>provincial</td></tr>
<tr><td>o 6%</td><td>US</td></tr>
<tr><td>o 7%</td><td>overseas</td></tr>
<tr><td>o 8%</td><td>other Canadian Provinces</td></tr>
</table>

PRTD Survey, January 2008




CTS/ITS 2004 – Statistics Canada

These tourist markets generated the following number of trips in Ontario and to Peterborough and the Kawarthas.

| Tourist Market | # of trips in Ontario | # of trips in Peterborough Region |
|---|---|---|
| Boating and Swimming | 12,124,438 | 636,399 |
| Cross-Country Skiing and Snowshoeing | 230,902 | 2,570 |
| Cycling | 1,677,071 | 69,299 |
| Fishing | 4,635,217 | 202,752 |
| Golf | 2,582,429 | 71,533 |
| Hiking, Climbing, Paddling* | 9,791,940 | 405,006 |
| Hunting | 456,971 | 34,337 |
| Snowmobiling and ATV** | 529,223 | 515 |
| Wildlife Viewing | 1,602,920 | 108,599 |
| Casinos | 4,944,190 | 67,947 |
| Aboriginal Cultural Performances, Musical Concerts, Festivals and Attractions | 10,751,352 | 169,428 |
| Historical Sites, Museums and Art Galleries, Participatory Historical Activities | 5,763,890 | 99,952 |
| Fairs and Festivals | 4,906,217 | 119,963 |
| Shopping | 38,155,697 | 716,771 |

CTS/ITS 2004 – Statistics Canada

* # only includes Walking or Hiking ** # for Snowmobiling only

The types of activities that Peterborough & the Kawarthas have to offer have significant appeal to tourists as indicated in the Travel Attitudes and Motivations Study*:

| Activities During Overnight Trips In 2004-2005 | % of Canadians * | % of US * |
|---|---|---|
| All Water Based Activities (Outdoor) | 33% | 25% |
| Exhibits, Architecture, Historical Sites | 17% | 18% |
| Festivals and Events | 16% | 15% |
| Shopping, Dining, and Food | 16% | 14% |
| Visiting National, Provincial Parks | 11% | 10% |
| Public Campground in a Nature Park | 11% | 7% |
| Fishing - fresh water | 10% | 6% |
| Swimming in a Lake | 9% | 4% |
| Private Campground | 6% | 4% |
| Hiking- same day while on overnight trip | 5% | 4% |
| Farmer's Markets and Country Fairs | 4% | 4% |
| Motor boating | 4% | 2% |
| Kayaking or canoeing – freshwater | 4% | 2% |
| Golfing - played an occasional game | 3% | 2% |
| Ice fishing | 3% | 1% |
| Cycling - same day excursion | 3% | 1% |
| Bird Watching | 2% | 1% |
| Cycling - mountain biking | 1% | 1% |
| Hunting small game | 1% | 1% |

* Travel Activities/Motivations Study - 2006, % of travellers for whom this activity motivated trips

Core attractors do not attract visitors on a year round basis with the exception of OLG Slots at Kawartha Downs. A high percentage of the areas tourism businesses operate seasonally. A growing number of resorts are extending their season into the fall and winter months but this is the exception rather than the rule.

| Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|
| 14% | 25% | 38% | 23% |

CTS/ITS 2004 – Statistics Canada

# 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 Peterborough & the Kawarthas activity and amenities base and the quality of its entertainment, dining and shopping offerings.*

**B1.** The destination offers a range of memorable experience-creating, core and on-theme activities sufficient to sustain interest for more than 24 hours.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The core destination experience stands out as memorable to the visitor | | ✔ | |
| ii. | The **core experience** is typically "consumed" over a period greater than 24 hours. | | ✔ | |
| iii | A variety of on-theme activities are available to give guests a reason to stay overnight. | | ✔ | |
| iv | The average length of stay at the destination is greater than 24 hours. | | ✔ | |

Some elements of Peterborough & the Kawarthas can be considered memorable. The unique attractors are the Peterborough Lift Lock, the highest in the world, Petroglyphs Provincial Park, with the native pictographs that were discovered and The Canadian Canoe Museum. Other competitive destinations offer quality fishing opportunities, outdoor pursuits, gaming, and sizable festivals with reputation also.

Some of the core experiences are enjoyed for more than 24 hours however most, on their own, do not sustain interest for a period greater than 24 hours. Typical times to enjoy the activities:

| Activity | Y/N | Duration (hrs/day) |
|---|---|---|
| Visiting Peterborough Lift Lock | N | < 2 hrs avg. |
| Attending Havelock Country Jamboree | Y | 3-5 days |
| Visiting Peterborough Festival of Lights | Y | 1 day |
| Visiting OLG Slots at Kawartha Downs | N | 1-2 hours |
| Water based experiences - fishing, boating, swimming, etc. | Y | 79% (approx) of participants were on overnight visits. |
| Outdoor Recreation based Experiences (non water based) | Y | 65% (approx) of participants on overnight visits. |
| Historical and Cultural experiences | Y | 69% (approx) of participants on overnight visits. |

It can be said that when core and supporting attractors are combined as a cluster of experiences, there is significant potential to keep visitors in the area overnight.

While research states that the average length of stay in the destination is greater than 24 hours experience suggests that the vast majority of these visitors are summer residents or individuals visiting friends and relatives. While this is important for the purpose of the growing tourism revenues to the area; cottage residents and their guests offer limited economic impact to the destination. Guests staying in paid commercial accommodation represent the greatest opportunity.

Of the 2,095,944 total person visits for Peterborough Region in 2004, 59% or 1,234,564 stayed overnight*, and 41% or 861,381 were same-day visitors. It is important to note that 64% of overnight visitors were Visiting Friends and Relatives (VFR) thought to be related to cottage visits.

**B2.** The destination offers a range of memorable experience-creating, core and on-theme activities sufficient to sustain tourist interest on a year-round basis.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination offers **core activities** on a year-round basis. | | ✔ | |
| ii. | The destination offers **on-theme activities** on a year-round basis | | ✔ | |

As stated earlier in the report few core activities attract guests on a year-round basis. The same can be said for on-theme activities.

**B3.** Core activities are easily accessible to a variety of market segments at a variety of price points and layers of added value (i.e., richer/more expensive options for getting more out of the experience).

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Core and on-theme activities are easy to buy. | | | ✔ |
| ii. | There is a range of options and price points available for a variety of segments to engage in **core** or **on-theme** activities. | ✔ | | |

While there are any number of experiences that charge a fee or admission few offer the ability for the visitor to pre-purchase admission in advance, while not in the destination. Therefore purchasing options are limited to the individual business or operator. An example of an exception is that tickets/admission to the Havelock Country Jamboree can be purchased online. Visitors may also book campsites at the areas Provincial parks online or through a 1-800 telephone number.

Peterborough & the Kawarthas offer visitors a range of activities encompassing a variety of price points and layers of added value. These activities include product experiences that provide opportunities for relaxation, entertainment, interpretation, education, cultural / historic understanding, skills development and adventure.

There is a range of activities available and these are offered at various price points ranging from free to $100+. Core and on-theme activities are also available at a reasonable range of prices for admission.

PRTD Survey, January 2008

| Activity | Approximate Price Range |
|---|---|
| Peterborough Lift Lock Visitor Centre | FREE |
| Havelock Country Jamboree | $100 - $375 per person |
| Summer Festival of Lights | FREE |
| OLG Slots at Kawartha Downs | Starting at $5.00 |
| Water Based Experiences | FREE - most *(excluding rental costs)* |
| Outdoor Recreation Experiences<br>Accommodations<br>Golf<br>Snowmobiling Permits | Many FREE of charge<br>$25 - $200 per night<br>$18.50 - $75.00<br>$90.00 - $230.00 |
| Historical and Cultural Experiences | FREE - $45.00 - Minimal admittance fees for events. Higher prices for concerts, theatre etc. |

**B4.** The destination offers a variety of activities attractive to a variety of market segments at a range of price points and layers of added value. The range extends from most basic to multiple layers, including opportunities for relaxation, entertainment, learning, skills development, adventure and new experiences.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination offers a variety of activities with a range of sub-options for each. | ✔ | | |
| ii. | This range of activities is well promoted to and understood by guests. | | ✔ | |
| iii | This range of activities is easy to buy. | | | ✔ |
| iv | Groups have cooperatively invested in programming or animating public spaces, gathering and queuing areas. | | | ✔ |

The PrTD process has identified a variety of categories to describe visitor experiences offered in a destination. Peterborough & the Kawarthas offer guests experiences in all the identified areas of activity and interest as detailed in the chart below, with price points.

| Category / Activity | Business Type | Approximate Price Range |
|---|---|---|
| Relaxation | Restaurants / Cafés | $7 - $35 |
| | Accommodation/Resort/B&B's | $200.00 |
| Entertainment | Restaurants | $9-$20 |
| | Festivals/Events | Free to minimal $ |
| | Adventure Provider | $5-$350 |
| | Casino/Gaming | Starting from $5 |
| Interpretation | Lang Pioneer Village | $3-$15 |
| | Buckhorn Fine Art Festival | $6 |
| | Trent-Severn Waterway | $1.50-$27.40 |
| Education | Golf Lessons | $35-$99 |
| | Green Up Ecology Park | $3 -$5 |
| | Camp Kawartha | $105-$175 |
| Cultural / Historical Understanding | Provincial Parks | $9-$17 day use<br>$24-$38 camping nightly |
| | The Canadian Canoe Museum | $5-$25 |
| | Whetung Ojibwa Centre / Curve Lake First Nations | Starting from $10 |
| Skills Development | Headwater Canoe Company | $37-$54 |
| | Golf Courses | $22-$34 |
| | Retail | $7-$500 |
| Adventure | Horse Riding Stables (lessons, trail rides, day & full week camps) | $25-$350 |
| | Adventure Outfitter | Starting from $5 |

PrTD Survey, January 2008

A wide range of activities are used to promote activities in order to attract visitors from outside the area or while they are in the area. Traditional communications tools are used, for example paid advertising in newspapers, magazine, radio, TV, out-of-home, brochures and visitor publications. Some operators attend trade and consumer shows. Most distribute brochures through visitor centres and brochure racks. A significant number use the internet either through a web site, e-newsletters or advertising.

While these activities contribute to the awareness of the destination and the individual businesses that operate in the area potential guests do not have an accurate picture of what is available especially when outside of the destination. There is a greater opportunity for visitors to understand the range of experiences that are available once they are in the destination.

In terms of animating public spaces activities are limited to a variety of seasonal farmers' markets and sidewalk sales. Animating public spaces, gathering or cueing areas often helps reveal the personality of a destination. Street musicians, buskers, artisans are often used by Business Improvement Area's or Chambers of Commerce to create a welcoming atmosphere for visitors in these spaces.

**B5.** The destination offers cultural experience and entertainment options, from basic to venues/ shows/ events credible at regional to larger scales, over a range of prices.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination offers a <u>range</u> of cultural experience and entertainment options. | ✔ | | |
| ii. | Events or venues in the last two years included performances by artists with name recognition beyond the local region. | ✔ | | |

The destination has attracted a number of artists with name recognition beyond the local region. The two major summer festivals lead the way in this regard and over the years have featured a variety of artists known on a provincial, national or international scale. The destination has several venues that accommodate other performances of significance throughout the calendar year, the majority of which target the local market.

| **Event / Venue** | **Performers** |
|---|---|
| Showplace Performance Centre Peterborough | Brent Butt, Hedley, Tom Cochrane, Ron James, Holly Cole, John Mc Dermott, Ron Sexsmith, Blue Rodeo, Matthew Good, George Canyon, Doc Walker |
| Peterborough Memorial Centre | CATS, The Tragically Hip, BMX |
| Red Dog Tavern | Tom Wilson, Washboard Hank, Wassabi Collective |
| Market Hall | Kathleen Edwards, Emilie-Claire Barlow |
| Havelock Country Jamboree | George Canyon, Hal Bruce, Connie Smith, The Good Brothers, Shane Yellowbird, Carlene Carter, Juice Newton, Aaron Tippin, Tracy Byrd, Travis Tritt, Clint Black, Lonestar, Tanya Tucker, Leann Rimes |

| | |
|---|---|
| Peterborough Summer Festival of Lights | Emerson Drive, Kalan Porter, Doc Walker, Peter Noone, The Harlem Gospel Choir, Davy Jones, Hermans Hermits, Tom Cochrane, Michael Burgess, John McDermott, The Wilkinsons, Gordon Lightfoot, Blue Rodeo, Serena Ryder |

PrTD Survey/Resource Audit, January 2008

**B6.** The destination offers a broad range of dining options.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination offers a range of dining options at a range of price points. | ✔ | | |
| ii. | A number of restaurants have wine lists with more than 25 labels. | | ✔ | |
| iii | A number of restaurants have trained and accredited chefs. | | | ✔ |
| iv | A number of restaurants/chefs have name recognition beyond the local region. | | | ✔ |

Peterborough & the Kawarthas offer visitors a range of dining options. The majority tend to be categorized as mid-range however there are several high-end dining experiences available. Few restaurants have wine lists with offerings greater than 25 labels; however one or two have extensive wine lists. In terms of having accredited chefs few have this distinction. It cannot be said that the restaurants in the area have name recognition beyond the local region. It is worth noting that there are several dining establishments located in resorts that do offer excellent menus and food service. Many are establishing themselves as contenders in the growing culinary tourism arena where focus on food preparation, menu options and wine pairing are fundamental to an establishment's success. Another dimension that is taking shape in some restaurants is the offering of locally produced food products.

| Restaurant | Number of Restaurants | Avg. Entrée Price Range |
|---|---|---|
| Fast Food | 20 | $2.50-$14.95 |
| Mid Price | 75 | $3.50-$25.00 |
| High End | 11 | $18.00-$35.00 |

PRTD Survey/Resource Audit, January 2008

**B7.** The destination offers a broad range of shopping options.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination offers a range of retail shopping opportunities including clothing, crafts and memorabilia at a range of price points. | | ✔ | |
| ii. | Stores or galleries in the destination area have name recognition beyond the local region (branded items, excluding chain department stores). | | ✔ | |

In terms of retail shopping experiences, Peterborough & the Kawarthas has a variety of high-end to bargain retailers. Some are independently owned and offer a unique selection of merchandise. Some also have name recognition beyond the local region.

| Shopping Description | High End | Mainstream / Average | Bargain / Discount | TOTAL |
|---|---|---|---|---|
| Antique Market | | | | |
| Antique Shop/Store | 1 | 7 | 1 | 9 |
| Bookstore/newsstand | | 7 | | 7 |
| China and Linens | 1 | | | 1 |
| Crafts | 1 | 4 | 1 | 6 |
| Department Store | | 5 | | 5 |
| Discount | | | 10 | 10 |
| Factory outlet | | | | |
| Farmer's Market | | 7 | | 7 |
| Fashion/Clothing | 9 | 32 | | 41 |
| Flea Market | | | | |
| Gallery | 9 | 18 | | 27 |
| Gift/Souvenir | | 17 | | 17 |
| Jewellers | 3 | 3 | | 6 |
| Liquor Store | | 13 | | 13 |
| Music | | 4 | | 4 |
| Specialty Shop | 17 | 55 | 1 | 73 |
| Grocery Store | 2 | 22 | | 24 |
| Spa- Health/Beauty | 2 | 8 | | 10 |
| General/Variety Store | | 46 | 2 | 48 |

PRTD Survey/Resource Audit, January 2008

# SATISFACTION AND VALUE

*This section documents the extent to which Peterborough & the Kawarthas 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 region against these attributes. It also evaluates how Peterborough & the Kawarthas is investing in improving performance in these areas.*

**C1.** Guests feel welcomed into a community that is happy to host, serve or engage them.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination is considered "friendly" or "very hospitable" by guests and by travel agents and tour operators packaging experiences at the destination. | | | ✔ |

**C2.** The destination offers a highly satisfying experience to its guests.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination carries out regular surveys which track guest satisfaction and their perceptions of value and hospitality. | | | ✔ |
| ii. | The most recent survey indicated that most guests were very satisfied with their destination experience. | | | ✔ |

**C3.** The destination is perceived as offering value for money spent.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination is considered “good value” or “expensive but worth every cent” by guests and by travel agents and tour operators packaging experiences at the destination. | | | ✔ |
| ii. | Key experience and service prices are monitored and are staying constant or trending up. | ✔ | | |
| iii | Visitation is trending upwards. | | | ✔ |

Satisfaction and value is one of the most important benchmarks of a guest’s experience in a particular destination. That being said Peterborough & the Kawarthas scores low on this measurement. The destination ranks low as a result of “not knowing”. Specifically no quantifiable information is gathered to monitor guest satisfaction levels on a community or region-wide basis. Individual businesses may monitor satisfaction levels but rarely is this information shared throughout the tourism industry. 68% of the tourism businesses surveyed gave no indication that they collected any type of visitor satisfaction information. The majority do not track satisfaction or guest experience levels.

In terms of prices for experiences offered, the majority of businesses have increased their prices an average of 3% – 8% in the past 3 years. While prices have increased visitation to the destination has decreased. Many factors have impacted the decline in visitation not only to Peterborough & the Kawarthas but to many other Ontario and Canadian destinations. Increased prices have not been the reason for a decline in visitation to the destination.

Here is an example of the price movement from some key tourism businesses.

| **3 Year Price Trend of Experiences** | | |
|---|---|---|
| **Sample Experiences** | **Current Price** | **Price Trend Past 3 Years** |
| The Canadian Canoe Museum | \$5- \$7.50 | Steady |
| 4th Line Theatre | \$15-\$23 | Increase |
| Hutchison House Museum | \$3-\$15 | Increase |
| Norwood Fair | \$6-\$8 | Increase |
| Showplace Performance Centre | \$5-\$45 | Increase |
| Fiesta Buckhorn | \$5-\$15 | Increase |
| Lift Lock Cruises | \$8-\$16 | Steady |
| Pine Crest Golf Club | \$22-\$25 | Steady |
| Serpent Mounds Park/Historic Site | \$22-\$25 | Steady |

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| Visitation Trend | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---|---|---|---|---|---|---|---|
| Total visits | 2,199,816 | 2,068,884 | 2,435,524 | 2,491,393 | 2,349,581 | 2,037,932 | 2,095,944 |

CTS/ITS 2004 – Statistics Canada

# ACCESSIBILITY

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

**D1.** The destination is within 2-3 hours drive from a major population centre or international gateway, or a lesser drive time from a regional gateway.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The travel time to the nearest major urban market is less than 3 hours. | ✔ | | |
| ii. | The population within a 3-hour drive time is substantial. | ✔ | | |
| iii | Drive time from the nearest U.S. border crossing or international airport is less than 2 hours. | ✔ | | |
| iv. | Flight time from the international to the nearest regional airport is less than 1 hour. | ✔ | | |
| v. | Drive time from that regional airport is less than 1 hour. | ✔ | | |

Peterborough & the Kawarthas is conveniently located in close proximity to more than 7.6 million people, all living within 3 hours of the destination. Travel time to Toronto, the nearest concentrated population centre is 1.5 – 2 hours.

The drive time from Peterborough to Pearson International Airport in Toronto is 1h 45 min, 148 km. The closest U.S. border crossing to Peterborough and Kawarthas is the Thousand Islands Bridge. It is located at Ivy Lea near Gananoque, ON and connects to Collins Landing near Alexandria Bay, New York (2 hours or 230 km). Niagara Falls (Queenston) to the west connects Buffalo, New York ( 3 hours and or 262 km).

Flight time from Pearson International to Peterborough Municipal Airport is approximately 30 minutes. Drive time from Peterborough Municipal Airport to downtown Peterborough is 30 minutes.

**D2.** Travel from the nearest urban centre or gateway is not unpleasant, and is achievable with minimum effort and discomfort.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Travel from the nearest urban centre or gateway is not unpleasant. | ✔ | | |
| ii. | A direct connection to the destination (e.g., via a shuttle bus service) is conveniently available, or travel by private car is over a route(s) generally accepted as direct and well marked. | | ✔ | |

Travelling to and within the destination is not unpleasant. Major highways and secondary roads are in good condition in all seasons. Winter driving can be challenging at times but for the most part all roads are well maintained during the winter months.

The most common route to Peterborough from the largest urban market is Highway 401 & Highway 115 to the City of Peterborough. Highway 115 joins up to Highway 7, which travels East and West across the southern portion of Peterborough & the Kawarthas Region. To reach the northern reaches of the destination, tourists would most likely take Highway 7 to Highway 28, to Lakefield, and then either continue on Highway 28 North towards Apsley and on through to Bancroft, or connect with County Road 507 north towards Haliburton.

Greyhound Canada runs daily service (7-8 buses daily) from the Greyhound station in the City of Peterborough to the downtown terminal in Toronto. There are bus options that make various stops along the way and express options at select times and days as well. Coach Canada runs a shuttle service to Pearson International Airport on a reservation service.

**D3.** The destination is accessible by alternative travel modes and price options.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Alternative modes of travel from the urban centre/gateway are available. | ✔ | | |
| ii. | If located on the water, the destination is accessible to cruise ships. | | | ✔ |
| iii. | If located on the water, the destination offers slips to transient boaters. | | ✔ | |
| iv. | If located on the water, the destination's cruise ship and/or transient marina slip dockage are located in or close to downtown or the attraction, with attractive and comfortable spaces between them. | | | ✔ |

As stated earlier alternate modes of travel are available to the destination but are limited to private motor vehicles, bus or motor coach, private shuttle services, plane (not scheduled passenger service) and private boat.

Cruise ships currently do not operate in the area but the Trent-Severn Waterway could accommodate such vessels.

Given the prominence of water based activities in the area, a core attractor, the destinations ability to accommodate transient or visitor boaters is important. There are a large number of marinas and boat ramps within the destination that service boaters and 257 transient boat slips have been identified through the audit process.

The transient boat slips mentioned above for the most part are not located in close proximity to attractors. The Peterborough Marina, with 90 identified transient boat slips is located on Little Lake in the City of Peterborough and within reasonable walking distance to the downtown. Although it is close it is not considered easily accessible due to the unattractive nature of space between the two locations. A recent study (A Functional Review of Del Crary Park, June 2007) noted there is no formal walkway along the shoreline, towards downtown and *"Del Crary Park is not well linked physically to the surrounding public areas and complementary commercial land uses".*

**D4.** The destination is investing in making access to it and its attractions attractive and visitor friendly.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The Transportation Resources Checklist has been completed, | ✔ | | |
| ii. | A minimum of 9 "Yes's" have been recorded [a minimum of 6 "Yes's" are required for an "Almost]." | ✔ | | |

The Transportation Check List (Appendix A) is complete, 9 Yes's (six or less = non- compliance) have been recorded which assumes the destination can say it has consulted with transportation resources and provides fundamental transportation services.

# ACCOMMODATIONS BASE

*This section assesses the breadth and depth of Peterborough & the Kawarthas offering in terms of the range of accommodation classes available, their location, and the presence of higher end operators. The evaluation characterizes the region's accommodation base.*

**E1.** The destination offers accommodations across a range of types and a variety of quality levels and price points.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination offers rooms at a variety of quality levels and price points. | ✔ | | |
| ii. | There is a range of choices in locations relative to attractions/ venues, and a range of price points. | ✔ | | |
| iii. | This inventory includes representation by "branded" (widely known and respected) higher end operators. | ✔ | | |

Peterborough & the Kawarthas offers visitors accommodation options with a total of 1463 roofed guest rooms at a variety of price points and most are within close proximity (driving distance) of core attractors. In addition the destination has a total of 1006 dorm rooms that are suitable for groups in the summer months. The region has 4577 campsites/RV sites.

The destination has a number of well known and branded accommodation options.

These include:

- Holiday Inn-Peterborough Waterfront
- Best Western Otonabee Inn
- Motel 6
- Super 8
- Quality Inn
- Comfort Inn

There are no "higher end" or 5 star properties in the destination.

| | # Of Properties | # Rooms/Sites/ Units | Price Range |
|---|---|---|---|
| RV Park/Campgrounds | 64 | 4577 | $25-$150 per night<br>$150-$259 weekly<br>$500 monthly<br>$1250-$2345 seasonal |
| Bed & Breakfast | 54 | 127 | $51-$150 per night |
| Lodge | 3 | 36 | $51-$200 per night |
| Eco-Accommodation | 2 | 2 | $60 per night<br>$420 weekly |
| Resort Lodge/Hotel | 11 | 349 | $90-$255 per night<br>$439-$2090 weekly |
| Motel – Independent | 12 | 203 | $45-$100 per night |
| Motel Chain | 0 | 0 | 0 |
| Hotel – Independent | 5 | 107 | $51-$100 per night |
| Hotel Chain | 6 | 639 | $69-$164 per night |
| *Cottage Rental Properties (Total) | 85 | 1093+ | $51-$200 per night |
| (Seasonal) | 64 | 545+ | |
| (Open Year Round) | 21 | 340+ | |
| Trent University, Sir Sandford Fleming College (seasonal availability) | 2 | 1006 | $50-$100 per night |

* Cottage Rental Properties include: arrange of accommodation types who rent cottages i.e. cottage resorts, B&B etc.

# PERFORMANCE

The PERFORMANCE elements, criteria and measures identify the extent to which the destination is successful and recognized in the market place.

**Evaluation Rating for Peterborough and Kawarthas** ○ ***No***

***Out of 21 measures, 1-yes, 9- almost and 11- no***

*The* ***Performance*** *measures identify the extent to which Peterborough & the Kawarthas is successful and recognized in the marketplace. By comparing Peterborough & the Kawarthas' 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 Peterborough & the Kawarthas' market performance in terms of visitation numbers and market share, attractiveness to different market segments, and times of year*

**F1.** The destination draws a significant share of Ontario's total travel to attractions of its type.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination attracts a significant number of guests. | | ✔ | |
| ii. | The destination attracts a significant share of total VFR/Pleasure motivated travel by residents of Ontario. | | ✔ | |
| iii. | The destination attracts a significant portion of its visits from markets beyond Ontario's borders. | | | ✔ |
| iv. | The destination's <u>share</u> of visits by <u>all</u> visitors (day and overnight) to the province from markets beyond Ontario's borders is significant. | | | ✔ |
| v. | The destination's share of meetings and conventions-motivated travel to Ontario is significant. | | | ✔ |
| vi. | Total visitation is not dominated by same day guests | | | ✔ |
| vii. | The destination's share of visits in Ontario which included activities relying on the destination's core attractions classes is significant. | | ✔ | |
| viii. | The destination's shares of the visits identified above are significant in comparison to competitive destinations in Ontario. | | ✔ | |

Data used in this section, unless otherwise stated, is from Statistics Canada's Canadian Travel Survey and International Travel Survey (CTS/ITS). 2004 is the most recent year for which official statistical information about visitation is available in Canada. This is because Statistics Canada changed the methodology and definition of domestic travel in 2005 and is still analyzing the data before their release of 2005 data.

In 2004 Peterborough & the Kawarthas attracted a total of 2,095,944 guests, 1,234,564 staying overnight and 861,381 on day trips.

| | Person Visits to Peterborough County | % Break down of visits |
|---|---|---|
| **Overnight** | **1,234,564** | **59%** |
| **Same-Day** | **861,381** | **41%** |
| **Total** | **2,095,944** | **100%** |

| Overnight Visits to Peterborough Region | | |
|---|---|---|
| **32,506** | **3%** | **From other provinces** |
| **61,547** | **5%** | **From the U.S.** |
| **26,286** | **2%** | **From other international markets** |
| **1,114,225** | **90%** | **From Ontario** |

| Same Day Visits to Peterborough Region | | |
|---|---|---|
| **8,261** | **1%** | **From other provinces** |
| **12,564** | **1%** | **From the U.S.** |
| **2,602** | **0%** | **From other international markets** |
| **837,594** | **97%** | **From Ontario** |

In 2004, Peterborough Region attracted 3,928 meetings and convention-motivated trips, or 0.14 % of the 2,825,398 total meetings and conventions-motivated trips to Ontario.

In 2004, destination visitation, which included the activities identified below, represented the stated shares of all trips in Ontario, which included the same activities.

**Overnight Visits to Peterborough Region as Percent of Total Overnight Ontario Visits with Specific Activity**

| Activity on Overnight Visits | Overnight Local (P&KL) | Total Overnight Ontario | Local – Peterborough | Northumberland (CD14) | Muskoka (CD44) | Simcoe County (CD43) | Bruce (CD41) | Haliburton (CD46) | City of Kawartha Lakes - Victoria(CD16) |
|---|---|---|---|---|---|---|---|---|---|
| Visit Friends and Relatives | **788,368** | **28,791,781** | **3%** | 1% | 3% | 6% | 2% | 1% | 1% |
| Festivals/Fairs | **103,801** | **3,225,712** | **3%** | 1% | 3% | 6% | 3% | 3% | 1% |
| Cultural Performances | **45,646** | **3,450,816** | **1%** | 1% | 2% | 4% | 2% | 1% | 0% |
| Museums/Galleries | **87,797** | **4,113,757** | **2%** | 1% | 1% | 3% | 2% | 0% | 1% |

Continued on next page...

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Zoos/Aquariums/Gardens | **127,166** | **1,977,019** | **6%** | 1% | 2% | 5% | 2% | 1% | 0% |
| Sports Events | **109,614** | **2,900,123** | **4%** | 1% | 3% | 4% | 2% | 1% | 0% |
| Shopping | **499,291** | **20,781,743** | **2%** | 1% | 2% | 6% | 3% | 1% | 1% |
| Sightseeing | **371,747** | **15,453,714** | **2%** | 1% | 7% | 7% | 3% | 2% | 1% |
| Nightlife | **135,228** | **7,600,511** | **2%** | 0% | 2% | 6% | 1% | 0% | 0% |
| Casinos | **51,601** | **3,012,262** | **2%** | 0% | 1% | 12% | 1% | 3% | 3% |
| Theme Park | **50,085** | **1,861,774** | **3%** | 0% | 4% | 9% | 3% | 0% | 0% |
| National/Provincial Parks | **90,739** | **5,390,529** | **2%** | 1% | 3% | 6% | 5% | 1% | 1% |
| Historic Sites | **85,051** | **4,989,036** | **2%** | 1% | 2% | 4% | 3% | 0% | 1% |
| Any Outdoor Activity | **633,833** | **16,495,960** | **4%** | 1% | 5% | 9% | 3% | 3% | 2% |
| Boating* | **303,352** | **4,575,108** | **7%** | 1% | 10% | 9% | 2% | 5% | 3% |
| Golfing* | **63,397** | **1,667,525** | **4%** | 2% | 7% | 10% | 7% | 6% | 3% |
| Fishing* | **175,002** | **3,594,086** | **5%** | 3% | 6% | 6% | 2% | 5% | 1% |
| Hunting* | **34,337** | **263,407** | **13%** | 0% | 5% | 0% | 1% | 1% | 0% |
| Downhill ski/Snowboarding* | **0** | **388,165** | **0%** | 0% | 1% | 60% | 0% | 3% | 0% |

*included in "Any Outdoor Activity"

**F2.** The destination offering draws from multiple market segments.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination attracts visitors with differing visitor profiles. | | ✔ | |

| **% of Ontario Visits by Market Segments - by Demographic** | | | |
|---|---|---|---|
| **Market Segments** | **Total Ontario Visits** | **Visits to Peterborough Region** | **% Share of Ontario Visits** |
| **Adults Only** | **53,435,910** | **1,032,506** | **2%** |
| Overnight | 23,375,185 | 489,369 | 2% |
| Same Day | 30,060,725 | 543,138 | 2% |
| **Adults with Teens/Children** | **9,282,777** | **194,104** | **2%** |
| Overnight | 3,718,208 | 135,456 | 4% |
| Same Day | 5,564,568 | 58,648 | 1% |

| **% of Ontario Visits by Market Segments - by Activity** | | | |
|---|---|---|---|
| **Market Segments by Activity** | **Total Ontario Visits** | **Visits to Peterborough Region** | **% Share of Ontario Visits** |
| Visit Friends and Relatives | 58,770,458 | 1,294,776 | 2% |
| Festivals/Fairs | 4,906,217 | 119,963 | 2% |
| Cultural Performance | 5,845,035 | 49,465 | 0.8% |
| Museums/ Galleries | 5,763,890 | 99,952 | 2% |
| Zoo/Aquariums/Gardens | 3,337,998 | 159,892 | 5% |
| Sports Events | 6,765,837 | 160,136 | 2% |
| Shopping | 38,155,697 | 716,771 | 2% |
| Sightseeing | 23,836,351 | 456,820 | 2% |
| Nightlife | 10,715,253 | 156,476 | 1% |

| | | | |
|---|---|---|---|
| Casinos | 4,944,190 | 67,947 | 1% |
| Theme Park | 3,186,427 | 69,008 | 2% |
| National/Provincial Nature Parks | 7,698,653 | 116,614 | 2% |
| Historic Sites | 7,037,722 | 114,615 | 2% |
| Any Outdoor/Sports Activities | 25,965,816 | 800,117 | 3% |
| Boating | 5,382,853 | 326,810 | 6% |
| Golfing | 2,582,429 | 71,533 | 3% |
| Fishing | 4,635,217 | 202,752 | 4% |
| Hunting | 456,971 | 34,337 | 8% |

**F3.** The destination offering draws from market segments over more than one season.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Visitation is distributed among multiple market segments over more than one season. | | | ✔ |

| Quarterly Distribution of Total Visitation Adults Only & Adults with Teens/Children | | | |
|---|---|---|---|
| **Q1** | **Q2** | **Q3** | **Q4** |
| 14% | 25% | 38% | 23% |
| **"Adults Only"** | | | |
| 15% | 25% | 37% | 23% |
| **"Adults with Teens/Children"** | | | |
| 9% | 24% | 47% | 20% |

# OCCUPANCY AND YIELD

*This section assesses Peterborough & the Kawarthas' market performance in terms of accommodation occupancy and guest expenditure levels. The evaluation compared occupancy and expenditure performance against industry and provincial averages*

**G1.** The commercial accommodations base has occupancy rates in excess of 65%.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The annual average accommodations occupancy rate is over 65%. | ✔ | | |
| ii. | Occupancy is spread throughout the year | | | ✔ |

| | **2004** | **2005** | **2006** |
|---|---|---|---|
| **Occupancy** | 66.6 | 66.1 | 67.8 |
| **ADR** | 98.97 | 101.06 | 105.15 |
| **REV PAR $** | 65.92 | 66.77 | 71.32 |

Source: PKF

**G2.** The destination attracts a significant share of total provincial expenditures.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The average expenditure per capita for guests on day trips to the destination is equal to or greater than the provincial average. | | | ✔ |
| ii. | The average expenditure per capita for guests on overnight trips to the destination is equal to or greater than the provincial average. | | | ✔ |
| iii. | The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips in Ontario. | | | ✔ |
| iv. | The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips in Ontario. | | | ✔ |

The average expenditure for guests on day trips to Peterborough Region was $ 22.29 or 36% of the $62.56 average for Ontario. The average expenditure for guests on over -night trips was $157.35 or 58% of the $270.27 average for Ontario.

Total spending by guests on **day trips** to the destination was $19,190,417. Total spending by all tourists on day trips in Ontario was $4,474,312,938. The destination's share of total spending was 0.4%. Peterborough Region's share of all same day visits in Ontario for 2004 was 1.2%, or 861,381 of 71,612,018 person visits.

| % of Day Trips vs. % of Spending While on Day Trips | | | |
|---|---|---|---|
| Total Day Trips in Ontario | 71,612,018 | Total Spending in Ontario while on Day Trips | $4,474,312,938 |
| Total Day trips in Peterborough Region | 861,31 | Total Spending on Day trips in Peterborough Region | $19,190,417 |
| Peterborough Region's Share (%) | **1.2%** | Peterborough Region's Share | **0.4%** |

Total spending by guests on **overnight** trips to the destination was $194,252,615. Total spending by all tourists on day trips in Ontario was $12,606,368,560. The destination's share of total spending was 2.6%. Peterborough Region's share of all overnight visits in Ontario for 2004 was 1.5%, or 1,235,564 of 46,672,218 person visits.

| % of Overnight Visits vs. % of Spending While on Overnight Visits | | | |
|---|---|---|---|
| Total Overnight Visits in Ontario | 46,672,218 | Total Spending in Ontario while on Overnight Visits | $12,606,368,560 |
| Total Overnight Visits in Peterborough Region | 1,234,564 | Total Spending on Overnight Visits in Peterborough Region | $194,252,615 |
| Peterborough Region's Share (%) | **2.6%** | Peterborough Region's Share (%) | **1.5%** |

# CRITICAL ACCLAIM

*This section addresses the extent to which Peterborough & the Kawarthas 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 Peterborough & the Kawarthas is recognized as standing out from its competitors.*

**H1.** The destination is considered as "must see / must do" and is recognized as a symbol of its type of travel experience.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination is at the near or top of the list of places out-of town guests must be taken, or things guests must do when "seeing the sights" in the wider travel region. | | ✔ | |
| ii. | The destination is at or near top of mind when considering "must see/must do" places or activities offering the same type of travel experience as the destination. | ✔ | | |

It cannot be said that the destination is at the top of the list of places out-of-town guests must be taken. Depending on the point of origin there may be many places guests would be taken before coming to Peterborough & the Kawarthas. However if guests have specific interests the destination does offer unique experiences like those presented at The Peterborough Lift Lock and The Canadian Canoe Museum for example.

In terms of being top of mind compared to other destinations it can be safely said that the destination offers a variety of experiences that would compare favourably to other areas in the province and therefore be near or at the top of that list. This is especially true when considering the water based and outdoor recreation activities as well as several of the events and festivals that occur annually.

Here is a list of experiences and features in the destination that are included in OTMPC's web site and as designated as "Must See".

- The Peterborough Lift Lock, Peterborough
- The Canadian Canoe Museum, Peterborough
- Whetung Ojibwa Centre, Curve Lake
- Lang Pioneer Village, Keene
- Petroglyphs Provincial Park, Burleigh Falls
- Buckhorn Wildlife Art Festival, Buckhorn
- Lakefield Literary Arts Festival, Lakefield
- Serpent Mounds Park, Keene

**H2.** The destination has a role in branding/ marketing Ontario and/or Canada.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Destination imagery of, and/or text about the destination or its core attraction(s) is used in promoting Ontario and/or Canada. | | ✔ | |

Images of the destination and its many features are not often used in materials to promote Ontario or Canada. Occasionally there are examples where this happens but it is not the norm.

**H3.** The destination or its attractions have been ranked "best in class" or "top tier" in consumer or industry rankings.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The destination or its core attraction(s) has (have) been ranked as "Number 1," "Best in Class" or "top tier." | | ✔ | |
| ii. | Other products or experiences in the destination have been ranked as "Number 1," "Best in Class," "top tier," or otherwise recommended. | | ✔ | |

Several of the destinations core attractors have been identified as Best in Class or top tier, the resource audit found the following examples:

- **Peterborough Summer Festival of Lights** - awarded Attractions Canada No.1 Provincial Cultural Event in 2001 and one of the Top 50 Festivals in Ontario 2005/2006
- Outdoor Canada Magazine recently named **Peterborough & the Kawartha Lakes** as one of Canada's Top 10 places to live and fish
- **Havelock Country Jamboree** - nominated as one of the top five events in Canada by the Canadian Country Music Association
- National Geographic Book entitled "Journeys of a Lifetime: 500 of the World's Greatest Trips, October 2007, included the **Trent-Severn Waterway** as one of the great journeys across water.
    - The article highlights the variety of scenery witnessed by those traveling down the 386-kilometre waterway and mentioned experiencing the villages along the way (including Peterborough) as a highlight of the trip
- **Peterborough Lift Lock** - Lock 21 is the highest hydraulic lift lock in the world

Other distinctions include:

- **Camp Kawartha** received Platinum award for best children's camp from Durham Parent Readers Choice Award Magazine
- **Elmhirst's Resort** awarded Excellence in VQA wine lists from Vines Magazine
- The **Otonabee Conservation Authority**, Hope Mill Conservation Area, received 4 awards for restoration efforts including 1 national, 1 provincial and 2 local
    - National Award - WOOD Work's Heritage Award 2003
    - Provincial Award - the Heritage Community Recognition Program
    - Certificate of Achievement of the Ontario Heritage Foundation

- **Irwin Inn** received 2nd place in the Best Inn Category for Canadian Country Inn Magazine
- **The Indian River Reptile Zoo** is Canada's only accredited reptile zoo, determined by The Canadian Association of Zoological Parks & Aquariums
- **Buckhorn Fine Arts Festival** was recognised by Festival and Events Ontario in 2008. Awarded "Best Brochure" and "Best Souvenir Idea" in its respective budget category. The Festival was also named one of the top 100 festivals and events in Ontario for 2008

# FUTURITY

The FUTURITY elements, criteria and measures identify the extent to which the destination is investing in its future as a place with viable and continuing attractiveness to evolving markets.

**Evaluation Rating for Peterborough & the Kawarthas** ● **Yes**

***Out of 37 measures, 23-yes, 6-almost and 8-no***

***Futurity*** *identifies the extent to which Peterborough & the Kawarthas 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 Peterborough & the Kawarthas targets viable markets, invests in managing and promoting its tourism marketplace, and consults with the travel trade serving the region. The evaluation identifies if Peterborough & the Kawarthas is actively matching its product to the expectations of the tourism marketplace and is taking advantage of the knowledge of its travel trade customers.*

**I1.** The destination's product offerings are created and packaged to attract significant market segments with prospects for stability if not growth.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | There is a market demand for the destination's type of offering. | ✔ | | |
| ii. | Market demand to the destination's type of offering is stable or growing. | | ✔ | |

| |
|---|
| The Travel Activities and Motivation Study (TAMS) on the Canadian and American travellers was conducted between January and June of 2006. In the previous two years (2004 and 2005), 84% of adult Canadians and 79% of adult Americans had taken an overnight trip. |

Market demand for a destination's tourism experiences can be best determined by using a combination of indicators. Travel intentions, activities and motivations of travellers can provide useful information to help determine if the destination has what travellers are looking for.

In the case of Peterborough & the Kawarthas the 2006 Travel Activities and Motivations study indicates that the destination has what customers want in varying degrees.

| Activity | Motivated Trips |
|---|---|
| All Water-Based Activities | 33% |
| All Festivals and Events | 16% |
| All Winter Activities | 16% |
| All Shopping | 16% |
| Public Campground in Nature Park | 11% |
| Visiting National, Provincial Parks | 11% |
| Fresh Water Fishing | 10% |
| Lakeside Resort | 7% |
| Private Campground | 6% |
| Campsite in the wilderness | 4% |

TAMS, March 2006

Other indicators are also available. Visitation levels to Canada from U.S. and overseas markets demonstrate market demand. Travel increased from overseas markets by 3.4% in 2007 for a total of 4,559,680 visitors. Markets like Mexico, +17%, Australia +10% and China +5.3% lead the way. Travel from the U.S. however declined by 3.2% to 13,415,032 visitors. In terms of outbound Canadian trips to the U.S. and overseas markets they increased by 10.9% and 9.9% respectively.

Demand for overnight and same day travel for Ontario is demonstrated in the Ontario Tourism Outlook 2005-2011 report from June of 2007. The following table shows visitation projections for all of Ontario.

| Ontario Tourism Outlook 2005-2011 | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **2005** | **2006** | **2007** | **2008** | **2009** | **2010** | **2011** |
| **Total Visits ('000)** | **87,389** | **90,554** | **93,256** | **94,885** | **96,825** | **97,473** | **98,271** |
| % Change over previous year | -1.2% | 3.6% | 3% | 1.7% | 2% | 0.7% | 0.8% |
| **Overnight** | **33,815** | **34,376** | **34,624** | **35,676** | **36,416** | **36,565** | **36,773** |
| % Change over previous year | 3.2% | 1.7% | 0.7% | 3% | 2.1% | 0.4% | 0.6% |
| **Same Day** | **53,574** | **56,178** | **58,632** | **59,210** | **60,410** | **60,909** | **61,498** |
| % Change over previous year | -3.8% | 4.9% | 4.4% | 1.0% | 2.0% | 0.8% | 1% |

Closer to home at the Peterborough & the Kawarthas Visitor Centre, a variety of statistics related to inquiries are tracked. Numbers of walk-in and phone Inquiries have dropped noticeably from 2001 - 2007, while email inquiries have remained constant. Significant increases can be seen in website activity. Web sessions have gone from 72,639 in 2001 to 177,920 in 2007 indicating a growing desire from visitors to seek out information about the destination.

**12.** There is a Destination Marketing Organization (DMO) in place with funding sufficient to sustain awareness and motivate travel from target markets.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | There is a DMO in place with a focus on the local destination vs. a larger travel region. | ✔ | | |
| ii. | The DMO is funded at a level sufficient to reach target markets through print and electronic (e.g., Internet, toll-free phone lines, etc.) media. | | | ✔ |
| iii. | The DMO conducts surveys which track the influence of marketing on guest visits. | | | ✔ |

The Destination Marketing Organization (DMO) for Peterborough & the Kawarthas is the Greater Peterborough Area Economic Development Corporation. The GPA EDC is a regional economic development organization contracted to provide investment attraction & expansion and tourism services for the City and County of Peterborough. There are partnering organizations located in the Rice Lake area and Buckhorn that perform a marketing role as well as servicing visitors. These organizations produce visitor publications and have web sites detailing the tourism experiences in their respective destinations. Similarly BIA and Chambers perform tourism services roles in other communities.

The DMO is not funded to levels to effectively reach target markets interested in the destination's tourism experiences. 70% of the GPA EDC budget is funded by City and County contributions, the remaining 30% is received through Federal, Provincial governments and the private sector. Tourism programming receives $80,000 of the DMO's total budget. 25% of that amount focused on advertising. The DMO is effective with the resources it has and utilizes a variety of marketing tactics to attract visitation, the competitive marketplace is such that their efforts are limited, in comparison to competitive destinations. It is not known what the collective level (other tourism associations in Peterborough & the Kawarthas) of investment is made to market the destination.

There is currently no specific survey or tracking system in place to gage the effectiveness of the DMO's marketing efforts, or how they influence visitation levels.

**13.** Travel Trade operators and agents have been contacted for advice on product and package development opportunities

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | The Travel Trade Resources Checklist has been completed, and | ✔ | | |
| ii. | A minimum of 10 "Yes's" has been recorded. [A minimum of 7 "Yes's" is required for an "Almost."] | | | ✔ |

**14.** A tourism development and marketing strategy is in place.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | A destination development and marketing strategy focusing on growth in visitation and/or yield has been developed and is being implemented. | | ✔ | |

A destination development strategy is not currently in place however steps are being taken to put such a strategy in place within this fiscal year. There is an existing marketing strategy in place currently.

The strategy currently being utilized is the GPA EDC 2006-2010 Strategic Plan. Tourism Promotion is a key element of the overall plan.

The key goals and objectives of the Strategic Plan for Tourism Promotion are:

- Goal: We will differentiate our region through effective message development and communication.
  - "...building a common image and brand equity across the region. In our communication, clearly define our region geographically and its key assets..."
- Goal: We will initiate the provincial "Premier-ranked Tourist Destinations Project."
  - "...developing an inventory of resources and assets through internal research that will enable future government recognition, support and funding."
- Goal: We will promote and facilitate an improved customer service attitude
- Goal: We will Improve coordination of activities throughout the region
  - "...as a coordinating agency, to reduce duplication of effort, and be the primary support organization to facilitate itinerary and activity-specific "packages"..."
- Goal: We will operate the regional Visitor Centre as a first rate tourist destination
  - "...explore opportunities to expand services to meet the specific needs of stakeholders in Peterborough & the Kawarthas."

**15.** Performance towards the development plan's objectives is being monitored.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | A program for tracking progress towards objectives is in place. | ✔ | | |

The GPA EDC reports regularly to its Board of Directors in regard to its projects and initiatives. The GPA EDC also reports to both the City and County Councils. The tourism branch of the GPA EDC reports to the Tourism Advisory Committee. This reporting process indicates that there is accountability and that some form of tracking is in place.

**16.** Customer service training programs are in place.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | There is a customer service training program in place at the key experience/activity providers, as well as programs for the service community generally. | | | ✔ |

- Out of 452 Surveys completed, 93 businesses had no response to this question
- 10 responded not applicable due to being family owned and operated
- 42% (190) of businesses replied they had no customer service training
- 37% (169) of businesses replied "yes" they do have customer service training, but 43 did not list which programs they use

From the industry audit we can safely say that customer service training is not a priority of the tourism businesses in the destination. While some indicated extensive programmes are in place the majority do not.

# PRODUCT RENEWAL

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

**J1.** Re-investment and new investment is occurring to enhance, revitalize or develop facilities relevant to the quality of the tourist experience.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | In the past five years, capital has been invested in facility renewal, expansion or development. | ✔ | | |
| ii. | Core attractions demonstrate an ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience. | ✔ | | |
| iii. | A significant portion of that investment occurred in the past two years. | ✔ | | |

Within the past 5 years, 90% of businesses that took part in the survey indicated that they have invested capital in their business to improve or expand their facilities. 52 % of respondents indicated making investments within the past 2 years. The most significant financial contributions were in the Accommodations and the Attractions sectors. Much of this investment was spent on major upgrades to facilities, modernizing and improving their operation. The reported investment totalled $42.7 million.

| Examples of Developments and Improvements Made by Core Attractors | | | | |
|---|---|---|---|---|
| Have you invested Capital? | within 2 years | within 3-5 years | within 10 years | Types of investments made |
| Havelock Country Jamboree Inc. | yes | yes | yes | Additional campsites, performers |
| OLG Slots at Kawartha Downs | yes | yes | yes | Renovations to existing facilities |
| Summer Festival of Lights | yes | yes | yes | More performances, renovations, equipment |

**J2.** Investment and reinvestment in underdeveloped or underperforming assets is occurring.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Underdeveloped and underperforming assets (or the absence of same) have been identified in the Resource Audit. | ✔ | | |
| ii. | Investment and/or reinvestment is being made in developing or revitalizing underdeveloped or underperforming assets. | ✔ | | |

Through the Resource Audit survey results and in consultation with tourism industry leaders, it has become very clear that Peterborough & the Kawarthas Region has underdeveloped and underperforming assets. Examples of underdeveloped assets include:

- Historic Sites
- Cultural and Musical Festivals
- Sport Tourism
- Peterborough Region as a viable winter destination
- Transportation corridors and Regional Signage
- Trent-Severn Waterway System
- Kawartha Highlands Signature Site
- Outdoor Recreation Facilities
- Culinary Tourism - "field to the table" and Kawartha Choice Program
- Peterborough Marina, City Downtown, and Rural Main Streets

Investments in underperforming and undeveloped assets have been made:

- Peterborough County has completed a basic prototype Geographic Information System (GIS) called **Trip-Click** that invites visitors to explore local culture, conditions, and commerce. The system allows visitors to create custom tours, that they can then explore using personal GPS units, audio recordings and/or printed materials. **The Trip-Click** program pilot project is set along the TSW.

- **Culinary Tourism** opportunities are evident with funding to expand on and promote the existing **Kawartha Choice Farm Fresh Program.** The program is designed to connect local producers of fruits and vegetables, grains, dairy and meats with local restaurants and chefs while highlighting the partnership.

- **Review of the Del Crary Park** site, which includes the Peterborough Marina. The site is important to the City's current and future waterfront initiatives and the Peterborough Marina is a prominent feature of the Trent-Severn Waterway system. The review examined the deficiencies and opportunities of the site and made recommendations for improvements.

- **City of Peterborough Downtown Economic Analysis -** the study has pulled together a number of businesses, organizations, and municipal representatives to review the downtown's economic health, understand the changing roles of the downtown core, identify key issues and opportunities, and recommend solutions/ideas for the improved economic health in the downtown core

- **Winter Fishery** in the Kawartha region, the creation of this fishery would counterbalance the decreased Walleye numbers in the Kawartha Lakes caused by invasive species such as Zebra Mussels and non-native species like Rock Bass and Crappie. This new fishery would focus on "Pan-Fish" and be a significant financial contributor to Peterborough regions fishing tourism businesses.

- **Sunday Rifle Deer Hunting** during the established hunting seasons for each area, rifle hunting on Sundays was previously forbidden. This will increase the number of usable recreation days during the hunting season and generate increased economic activity for the region.

- **Ontario Speed Skating Oval** in Lakefield will be the only temperature controlled, outdoor, Speed Skating facility in Ontario, in spring 2008, the Oval completed Phase 1 of its construction that includes a full-length (400m.) natural ice track. Phase 2, which includes installation of the geo-thermal system and concrete pad for the final ice surface is scheduled for completion for the winter 2008 season

- **Sport Arenas** have received $13 million in investments for revitalization; improvements include upgrades, and major remodelling to accommodate increases in usage and to improve the functionality of the facilities.

- **New arena and community centre complex** in the Township of North Kawartha (Apsley), the facility will house an NHL sized ice surface and seating for 400 spectators.

- **Trent-Severn Waterway** will receive $63 million over the next 5 years to address the deficiencies raised in a recent study. The money is intended to increase annual infrastructure maintenance, repair and replacement budget by $21 million on a phased in basis starting immediately

- **Rail link between Peterborough, Union Station** and points throughout the GTA, a feasibility study funded by the Federal Government will begin to assess the benefits of improved service; the intent is to determine if it would be financially viable to extend Via Rail commuter service to the Peterborough Region.

- **The 407 Extension** connecting the existing corridor to the 115 Highway. The project is in the Preliminary Design Phase, the connecting link will improve traffic flow to and from Peterborough Region, as well as make it more accessible and attractive as an "easy to get to" destination.

- **Regional Signage Report and Strategy** Peterborough & the Kawarthas Tourism is currently developing this strategy; the main objective of a signage way-finding program is to provide visitors and residents with information to easily access local attractions, parks, historic buildings, and meeting venues.

- **Peterborough Regional Airport** is currently undergoing an expansion project.

# MANAGING WITHIN CARRYING CAPACITIES

*This section assesses the extent to which Peterborough & the Kawarthas 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 Peterborough & the Kawarthas' ability to manage the system that sustains it.*

**K1.** Destination visitation generates economic benefits to the host community.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Guest visits and expenditures make a net positive contribution to the local economy. | ✔ | | |
| ii. | Benefits and costs are balanced equitably across municipal boundaries. | | ✔ | |

In 2006 across Canada tourism generated $19.4 billion of revenue for all three levels of government. This was up 4.8% from one year earlier and up 29.4% from 2000. Municipal governments collected $1.1 billion.

Tourism brought an estimated $213,442,032 to Peterborough Region in 2004 according to CTS/ITS, this included $135,325,000 in direct, indirect and induced contributions to GDP, $66,504,000 in labour income and salaries, and $3,781,000 in municipal taxes. 2,482 part time, full time and seasonal jobs were created in the tourism industry. Tourism ranks second to agriculture in terms of economic impact.

*"The County, in partnership with the City of Peterborough and the local Municipalities shall participate in the collection of economic data, the establishment of economic strategies and implementation of economic policy programs which will have an impact on both Peterborough County and the City of Peterborough".* (Official Plan for Peterborough County, Section 4.6.3.1 - General, pg 4-38) The willingness to make statements such as this, indicate interest of government being involved in planning of economic development <u>for the entire region</u>.

The benefits derived from tourism are spread throughout the region. The diverse nature of the core attractors stimulates this. While the majority of the tourism infrastructure is located in the City of Peterborough, things like accommodations, restaurants, retail establishments, visitors travel throughout the entire region generating some economic impact in most if not all areas.

**K2.** Visitation does not consume local resources or increase their values to an extent that the local population is negatively affected.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Attractiveness of the destination to recreational or retirement home or investment markets has not bid up the cost of housing to the extent that it is unaffordable to the locally employed population. | ✔ | | |

| | | | | |
|---|---|---|---|---|
| ii. | Where labour pool constraints are occurring, a plan to resolve the problem is being implemented. | | | ✔ |
| iii. | Servicing guest visitation, or the investment to attract and accommodate it, does not consume labour or materials to the extent that their cost or availability to other sectors is impairing those sectors' profitability. | ✔ | | |
| iv. | Where resource cost or availability impacts are occurring, a plan to resolve the problem is being implemented. | | | |

Despite the attractiveness of Peterborough & the Kawarthas as a destination for cottage activity and retirement, housing prices have not been affected. In 2007, Century 21 Canada conducted a national house price survey of typical first-time homes in 128 neighbourhoods within 55 cities and towns across Canada, including 17 cities and towns in Ontario. The Century 21 survey found that housing prices in the Peterborough Region are among the lowest in the province on an average price per square footage basis.

According to the Rural & Tourism Development Director at the GPA EDC it is apparent that there are no identified issues of concern surrounding visitation and investment, and their implications on other sectors and their profitability.

**K3.** Trained labour is available to serve visitation demands at a level that maintains guest satisfaction.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | There is a labour pool sufficient to accommodate current and projected levels of visitation. | | | ✔ |
| ii. | Where labour pool constraints are occurring, a plan to resolve the problem is being implemented. | | | ✔ |
| iii. | Guest surveys confirm satisfaction with hospitality and service. | | | ✔ |
| iv. | Where dissatisfaction has been identified, a plan to resolve the problem is being implemented. | | | ✔ |

Survey results from the Resource Audit indicate that 46% or 210 businesses feel that there is a sufficient pool of labour to support their staffing requirements. However, 24% or 108 businesses felt that there is not enough trained labour, and 30% or 138 businesses did not respond to the survey question.

The Business Retention and Expansion Project for the Tourism Sector, conducted by the GPA EDC in 2006 indicated that the "ability to draw consistent quality labour" and "employer costs" are challenges facing the local tourism industry.

A recent study released by the Canadian Tourism Human Resource Council (CTHRC) shows that "in the years ahead, the challenge of finding enough people to fill tourism jobs will intensify - so much so that missed opportunities and the inability to meet potential business could cost the industry billions of dollars. By 2025, the potential labour shortage could reach 384,000 full-year jobs. This shortage represents the cumulative effect of missed opportunities and unfulfilled demand from 2005 to 2025.

The CTHRC estimates labour demand could grow by as much as 33% in that time. Potential tourism labour shortages by province indicate Ontario will likely experience the most significant shortage. But, when looked at as a percentage of labour demand, Atlantic Canada, Saskatchewan, BC and Alberta are expected to have the most acute shortages."
There does not appear to be an organized plan to address labour shortages within the Tourism Industry in the Peterborough Region.

As stated previously there is currently no customer satisfaction survey system in place. The Tourism Department of the GPA EDC is aware of this situation, and will be taking action to address this gap in information.

**K4.** Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by destination visitation.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | There is an environmental monitoring program in place which provides early warning that the quality of the resource or the visitor experience is at risk of being impaired. | ✔ | | |
| ii. | There is a community health and well being monitoring program in place that provides early warning of whether quality of life impact thresholds are being approached. | ✔ | | |
| iii. | Evidence from formal monitoring programs or informal observations indicates that no capacity/thresholds are being exceeded. | ✔ | | |
| iv. | Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented. | | ✔ | |

There are a number of organizations that have in place environmental monitoring programmes and community health and well being monitoring programs, they include:

- Ministry of Natural Resources
- Nature Conservancy of Canada
    - Rice Lake Plains
- Sir Sandford Fleming College
- Trent University
- Otonabee Regional Conservation Authority
- The Peterborough County City Health Unit

At the present time there is no indication that capacity or thresholds of community health are being exceeded. It is plausible that from time to time there may be isolated situations identified from the monitoring programs. However, there has not been any long term or reoccurring problems.

**K5.** Growth in visitation to the destination is not threatening the experience enjoyed by current visitors.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience is not being raised as issues by guests' surveys or by managers of facilities and resources. | ✔ | | |
| ii. | If issues are raised, they relate to one or two peak weekends only. | ✔ | | |
| iii. | A response to identified issues has been defined and is being implemented. | ✔ | | |

There has not been a significant number of issues raised relating to overcrowding or the diminished quality of experience by tourists, caused by visitor volume. Of the few issues that have been raised, there appears to be plans in place to address the problem. For instance, City Hall is now trying to work more closely with the Peterborough Summer Festival of Lights, to ensure ample parking availability.

**K6.** Infrastructure is available to accommodate current or projected levels of demand without exceeding carrying capacities.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | There is current/planned water treatment and delivery capacity to accommodate current and projected levels of visitation | | ✔ | |
| ii. | There is current/planned sewage treatment and trunk capacity to accommodate current and projected levels of visitation | | ✔ | |
| iii. | There is current/planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation. | | ✔ | |
| iv. | Assessments of the environmental effects of infrastructure expansions have been completed, with effects considered manageable and acceptable, as documented in: | ✔ | | |

Peterborough Utilities Commission (PUC) supplies all of Peterborough with safe, clean water supplied by the Otonabee River. PUC labs test thousands of water samples each year to ensure safety. They perform on-going facility maintenance and constantly upgrade and improve water infrastructure including Peterborough's water treatment plant.

The Kawartha Lakes Water Quality Monitoring and Education Program consists of local lake associations, local Health Unit, Conservation Authorities and the Ministry of the Environment who have well developed water quality monitoring programs that involve water chemistry analysis at numerous sites on each lake.

The Director of Planning with the County of Peterborough has indicated that there is either sufficient capacity for water delivery and sewage treatment or expansions have been planned where capacities are diminishing.

Although these plans are in place, the opinions expressed through the Business Retention & Expansion Study (BR&E) for the Tourism Sector in 2006, indicated that respondents' businesses were often affected by infrastructure, particularly issues related to water delivery/quality, sewer and road conditions.

*Note: In rural areas water capacity is supplied by wells. The servicing and maintenance of wells is the responsibility of the property owner. It is also the responsibility of the business to financially meet the requirements to meet the required capacities.*

In terms of current / planned road, transit, parking and trail capacity:

From the; *Peterborough Comprehensive Transportation Plan 2002*:

- Using structural improvements to increase transportation capacity through selected roadway widening, lane additions and extensions.
- Encourage development of high quality pedestrian facilities to provide safe and convenient access to transit services. Provide priority in the maintenance of roads and sidewalks used by transit. Maintain adequate funding to ensure that affordable, reliable and convenient public transit services can continue to be provided.

From the: *Vision 2010 Strategic Plan for Recreation Parks and Culture*

- With regards to the trail systems throughout the city, development and support a consistent maintenance program for the trail network system.
- Continue to enhance/expand the trail system.

From the: *Official Plan, County of Peterborough*

- To ensure that County roads continue to be effective corridors for the movement of people and goods in and throughout the County of Peterborough and the Province of Ontario.
- To ensure that County roads carry traffic from the local road system to Provincial highways.

**K7.** Municipal entities with approval authority are able to address development applications in a timely manner.

| | Measure | Yes | Almost | No |
|---|---|---|---|---|
| i. | Local and upper tier (where present) Official Plans have tourism related objectives and policies in place. | ✔ | | |
| ii. | There is a political will to move forward with those projects considered to further the objectives expressed in the Official Plan or other planning documents. Source: Peterborough and Kawarthas County Official Plan | ✔ | | |
| iii. | There are sufficient administrative resources in place to efficiently manage review, approvals and permit processes. | | | ✔ |

The County of Peterborough Official Plan has a section specifically for Tourism (pages 4-40 to 4-42). The objectives set out in the County Official Plan are not for the Tourism industry specifically, but for Economic Development as a whole. The County does recognize the importance of Tourism to the entire Peterborough Region and has policies set out to participate in the development of four-season tourism initiatives, and establishing and maintaining top quality tourism amenities throughout the region.

The City and County participate in funding the Greater Peterborough and Area Economic Development Corporation that handles the economic development for both the City and the County. Peterborough & the Kawarthas Tourism fall under the umbrella of the GPA EDC.

There does not appear to be sufficient administrative resources to manage the review, approval and permit processes in the region (City and County). According to the 2006 Business Retention & Expansion Project tourism industry stakeholders felt that “government processes and paperwork hindered their businesses”

# INTERPRETATION - SUMMARY OF FINDINGS

At the outset of the report a measurement criteria was described that rates the destination’s status related to the evaluation for its Product, Performance and Futurity dimensions. After completing the Destination Performance Summary using the data provided through industry surveys and supplementary information and research it has been determined that the destination is lacking in a number of fundamental areas.

**Product** - 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

**Peterborough & the Kawarthas rating:**
***◗ Almost** - the affirmation can almost be made and supported – one to several key efforts / investments will enable affirmation*

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

- Visitation
- Occupancy and Yield
- Critical Acclaim

**Peterborough and Kawarthas rating:**
***○ No** - the affirmation can not be made or supported – there are not enough key efforts / investments to affirm otherwise*

**Futurity** - Ability for a destination to thrive from tourism into the future is sustained by:

- Destination Marketing
- Product Renewal
- Managing within Carrying Capacities

**Peterborough and Kawarthas rating:**
● ***Yes**, the affirmation can be made or supported for the destination*

Positive affirmations cannot be made for all three measurement criteria. Peterborough & the Kawarthas however has potential to continue in developing as competitive tourism destination. The GPA EDC and the tourism industry in Peterborough & the Kawarthas should be encouraged that the PrTDF work has been completed and it has revealed both opportunities and gaps in the tourism offering.

The gaps are both narrow and wide and therefore the process does offer many tangible tactics that can improve the status of the destination when implemented. It supports the premise that Peterborough & the Kawarthas has the opportunity to develop and increase its overall market share as a top tourist destination in the very near future. There appears to be a willingness among tourism stakeholders to understand the recommendations coming from the PrTDF process and take steps to improve both collectively and individually.

# OBSERVATIONS

- **The destination has a long history of being active in tourism however the Industry may not be operating in the true benefit of partnership**
  - Roles confused among various organizations who are involved in tourism
  - No clear positioning for the wider destination creating a fragmented perception of what/where Peterborough & the Kawarthas is, perhaps creating confusion in the marketplace
  - Individual marketing and servicing activities may be good but it appears there is duplication in delivery
  - Willingness to partner is evident however not being practiced on a region-wide basis

- **A formal Tourism Destination Development plan is currently not in place**
  - The need has been identified previously and the GPA EDC is working to formalize this plan with in the next year
  - This plan should help prioritize identified actions from the PrTDF process
  - The plan must incorporate all destination development initiatives into one evolving plan that serves the destination over the long term

- **No clear brand exists for the destination that positions the destination**; its features and attributes in the minds of target visitor groups.
  - Consideration should be given to developing a product positioning statement, one that differentiates the destination

- **Effort to attract and service visitors is under funded**
  - There never may be enough resources to market and service the visitor market, however several organizations are allocating resources to market and service visitors, a question of duplication of effort could be raised

- A marketing audit might be in order to shed light on who is doing what, when and how
- In order to raise funds there is a willingness to explore introduce a destination development marketing fee collected by select accommodators in the City of Peterborough
- A possibility may exist to extend the scope of this type of initiative to a broader ranging geographic area

➢ **Labour issues exist**
- A trained and reliable labour force may not be available into the future
- The tourism industry needs to understand this issue more clearly as it is evident of being a significant future problem in communities in Ontario and nationally from coast to coast

➢ **It is unknown if the destination delivers good service and value for money and service. As well experience delivery may be inconsistent, due to lack of visitor surveys**
- While visitor surveys are used by individual operators surveys are not shared industry-wide and may not reveal how customers feel about their overall experience or if the destination delivers good service and value for money
- A comprehensive annual visitor survey would track satisfaction levels and provide valuable information to better position the destination and / or address deficiencies

➢ **Day and overnight expenditures are below provincial average** therefore steps must be taken to extend the length of stay of both these important visitor market segments. This may be accomplished by:
- Leveraging the significant number of trips that originate as a result of the visiting friends and relatives (VFR) market segment
- Attempt to extend length of stay and seasonality of visitors
- Better capitalize on the cottage population by ensuring they are treated as tourists and are experiencing the tourism products and features during their visits, this will increase overall revenues to tourism operators
- Many operators close in the off-season therefore attempts must be made to extend the seasons of a representative group of core visitor service providers

➢ **Attractors must be clearly understood in terms of how they match what visitors are looking for**, *"you have what they want".* As an example, the 2006 TAMS Study reveals that both Canadian and U.S. visitors desire to better themselves while visiting a destination, Peterborough & the Kawarthas has tourism experiences that provide opportunities for learning, relaxation, rejuvenation, and well being through exercise
- Creating easy to purchase experiences that match what customers are looking for and then taking them to market will help grow tourism visitation and revenues

- **Importance of tourism to the destination is not widely understood by a broad spectrum of audiences**
  - Municipalities mention tourism in their annual plans but it is not clear if leaders understand the important economic impact of tourism.
  - Municipalities must be committed to tourism development (infrastructure, product, experience, etc.) as well as tourism marketing
  - There are facts that support the notion of investment towards destination development and these facts need to be communicated and understood by community leaders, influencers, elected officials and the general public
  - For example:
    - At $11.6 billion, Tourism Gross Domestic Product (GDP) in Ontario was greater than that of the agriculture, forestry/logging, commercial fishing/hunting and mining industries combined in 2004.
    - Tourism was Ontario's 7th largest generator of foreign exchange in 2004, following Transportation Equipment, Machinery, Chemical Products, Computer & Electronic Products, Primary Metals, and Plastics and Rubber Products Manufacturing, tourism generated $6.7 billion in foreign exchange for the province.
    - In 2004, tourism employment in Ontario reached 213,500 jobs

- **Underdeveloped and Underperforming assets exist** and there are significant things in play:
  - Ontario Speed Skating Oval – represents a significant opportunity for winter season development (i.e. Year round destination)
  - Downtown revitalization – tourists seek attractive/active city centres
  - Del Crary Park – make needed improvements to better connect marina to downtown, unique restaurants and retail, etc.
  - Trent-Severn Waterway – support plans to improve
  - Rail link between Peterborough and the GTA
  - Kawartha Choice Farm Fresh in Partnership with Peterborough & the Kawarthas Tourism to develop strategy in line with the Ministry's Culinary tourism plan. Note: as of July 2008 Kawartha Choice Program under GPA EDC umbrella
  - Fish and Wildlife Interpretive Centre – support this new feature, it adds depth to a core attractor and helps position the destination
  - Kick It Up In the Kawarthas – experience development /coordination
  - Kawartha Highlands Signature Site - support efforts to potentially in time, open to tourists. It adds depth to a core attractor and helps position the destination

- **Sport tourism may represent a greater opportunity**
  - Determine where gaps exist in infrastructure, for example do venues and facilities need upgraded, do they require more spectator seating, athlete amenities or expansion
  - Are facilities at capacity with use from the local resident population
  - Skating oval is a Unique Selling Proposition
  - Creating a Sport Tourism Council could assist, advise and direct on issues pertaining to research, development and coordination of events

- Plan upgrades and developments to meet the standards required to host Provincial and National events
- Sports Tourism initiatives compete for the same funding dollars as other community agenda items, and often lose out
- Make better use of the facilities that we have by attracting events that do not use conventional facilities, but make use of places like gymnasiums.
- Explore other options to use facilities in off times of the day, week, year, and generate revenue
- Becoming aware of the opportunities surrounding "non-conventional" sport tourism, Firefighter Games (use Gyms), Ultimate Frisbee, Cricket, Wake Boarding, etc.

# PLANNING - RECOMMENDATIONS & ACTIONS

- **Expedite the implementation of a formal Peterborough & the Kawarthas Destination Development Plan**
  - GPA EDC has begun the work – affirm who does what in terms of future destination development
  - The GPA EDC cannot exclusively own the deliverables of destination development, it is a shared responsibility of many within the greater community
  - Use the GPA EDC Tourism Advisory Committee and its tourism stakeholders to engage the tourism industry in the development plan and process to ensure industry accountability for its content
  - With formal accountability in place ensure the tourism industry at large and municipalities, understand, engage in and embrace the activity to support overall destination development
  - Once a plan has been developed empower groups within the community to undertake implementation
  - The recommendations from the PrTDF project form the foundation for the plan and the implementation
  - Prioritize the actions – focus on delivering some short term wins combined with longer term development strategies and initiatives

- **Clarify who does what within the destination and establish a unified approach for:**
  - Destination sales and marketing
  - Visitor services
  - Destination Development – experience and product development

- **Continue to establish and launch a region-wide Destination Development Marketing Fee (DDMF)** by formalizing the process.
  - Establish the parameters and launch the DDMF based on the consultations and study completed
  - The destination reaps the benefit of increased resources for marketing and development
  - Supplements (not replaces) current funding sources
  - Use best practices as noted in other destinations: Burlington, Stratford, Cornwall, Brockville, Sault Ste. Marie, St. Catharines

- **Initiate a branding process** that delivers a positioning statement, line and look
  - Identify a brand that differentiates by understanding Peterborough and the Kawarthas tourism distinctive
  - Ensure it pushes the target to how you want to be perceived into the future
  - Ensure it clearly identifies who you are – practically and philosophically

- **Identify an efficient and effective mechanism to gauge and track the customer experience, their satisfaction levels and if they received value for money**

- Implement a region-wide customer satisfaction survey for example: 1 weekend a month, 6 months a year
- Potential role for Chambers and BIA's
- Strive to have an "introductory" understanding of what the customers think by May 2009
- Based on results develop a plan to exploit the good and address the not-so-good in terms of customer perceptions

- **Implement a regional customer service training program** – Establish a Peterborough & the Kawartha culture of hospitality excellence and then commit to the delivery of annual customer service training
    - The culture of hospitality excellence is in part a characteristic of the brand positioning, it should be reflected in the brand and be evident when customers experience the destination's products and services
    - Delivering exceptional value should be a cornerstone of any training activity
    - The culture must first be understood and embraced by the owner operator and then passed along to front-line staff
    - Best practices of customer service exist in the destination for example: OLG Slots at Kawartha Downs and select resort/hotel properties, determine if such organizations could pass along training and be part of the training program for the region
    - Capitalize on the expertise of the destination's colleges in delivering customer service training as well as tourism skills development
    - Utilize existing service training programmes developed by third party organizations *– i.e.) OTEC*

- **Continue to facilitate the delivery of on-going annual training to the tourism industry**
    - Capitalize on training initiatives offered by the Ministry of Tourism and Ontario Tourism Education Corporation, for example:
        - Tourism Inc. Market Readiness Training
        - Demand Generator Workshops
        - Tourism Keys or other internet training initiatives

- **Understand how impending labour shortages will effect the destination's ability to service guests into the future**
    - Capitalize on work already being done
    - Appoint an industry task force to delve into the specifics related to Peterborough & the Kawarthas
    - Engage the Workforce Development Board

- **Increase economic impact (revenues) of tourism by:**
    - Extending length of stay of all visitors by developing a strategy that delivers new or enhanced multi-day tourism experiences creating new reasons to visit
    - Creation of partnerships mandatory – bring new understanding to traditional "packaging" by creating opportunities for operators to dialogue together for the purpose of developing complementary tourism experiences

- Industry training part is required, implement up-dated packaging workshops that provide operators with the tools to take enhanced tourism experiences to market
- Capitalize on the reality that *"YOU HAVE WHAT THEY WANT"* by clearly understanding current travel behaviours and motivators and then by bundling those experiences that are currently offered. Also where needed, supplement desired experiences with other tourism offerings
- Capitalizing better on the visiting friends and relatives (VFR) market segment by ensuring hosts have the knowledge of the local tourism assets in order for them to be able to direct or accompany VFR to the destination's features
- Capitalize on the cottage population, similar to the strategy above and equip cottage owners with information that affords them the opportunity to be good hosts through taking visiting guests to the areas tourism attractors as well as themselves

- **Focus attention on the identified underperforming and/or underdeveloped assets or opportunities**
  - Prioritize the list – what will generate the greatest long-term impact to the destination:
    - Ontario Speed Skating Oval – represents a significant opportunity. The Skating Oval will generate much attention, this has the possibility of impacting tourism revenues in the very near term as well as help position the destination as a leader in sports tourism
    - Sport Tourism - Create a Sport Tourism Council to assist, advise and direct on issues pertaining to research, development, solicitation and coordination of sports tourism and specific events
    - Downtown revitalization – tourists seek attractive/active city centres
    - Del Crary Park – make needed improvements
    - Trent-Severn Waterway – support plans to improve
    - Rail link between Peterborough and the GTA
    - Kawartha Choice Farm Fresh – develop strategy in line with the Ministry's Culinary tourism plan
    - Fish and Wildlife Interpretive Centre – support this new feature, it adds depth to a core attractor and helps position the destination
    - Kick It Up In the Kawarthas – experience development/coordination, capitalize on the good work that is being done
    - Kawartha Highlands Signature Site - support this, it adds depth to a core attractor and helps position the destination
  - Capitalize on the work that has already started and as a tourism industry lend support where needed
  - Determine who drives the needed work for each initiative if not already underway, prioritize what needs to be done first

- **Increase awareness of the importance of tourism with a targeted public relations campaign**
  - Target business leaders, influencers, community groups, residents, government staff and elected officials

- Consider empowering local residents with the introduction of a Peterborough & the Kawarthas Ambassador program designed to turn local residents into a tourism promoting and servicing workforce abroad and locally
- Introduce an annual Tourism Awards Program to fully recognize leaders in tourism experience development, delivery, service. (i.e. White Hat Awards in Alberta.)

## NEXT STEPS

The Premier-ranked Tourist Destination project has provided a clear appraisal of Peterborough & the Kawarthas' position in the tourism marketplace, its strengths, opportunities and is a benchmark to measure future performance. With the knowledge of this information having tourism industry "buy-in" and more importantly, proactive industry involvement in future strategic planning and implementation is critical to improvement. The destination is encouraged to communicate the findings and recommendations to all involved in the tourism industry.

With this accomplished the Region's Tourism Advisory Committee should establish a process for implementation of the recommendations found in this report to engage the tourism industry in the development plan and process to ensure industry accountability for its content

## CONCLUSION

Tourism development has tremendous potential to enhance job and wealth creation within local municipalities while contributing to the quality of life for all residents. The implementation of the recommendations in partnership with local municipal efforts supports building and diversifying jobs and economic growth. The Premier-ranked Tourist Destination project provides a database of critical baseline data that paints a clear picture of Peterborough & the Kawarthas' strengths and weaknesses and provides direction to pursue improved tourism industry success and augment local municipal tourism efforts. The process involved several critical steps along the way and a serious commitment and investment of time by the industry partners involved, for this we are grateful. The result in part is an expanded network of area stakeholders who have a more cohesive focus on solving ongoing and future tourism challenges.

# APPENDIX

## APPENDIX A

| Transportation Resources Checklist | | Yes | No |
|---|---|---|---|
| **Attribute** | | | |
| 1. | a. The destination has at least one easily accessed Visitor Information Centre,<br>b. on a major transportation route.<br>c. with clear and frequent directional signage | X<br>X<br>X | ☐<br>☐<br>☐ |
| 2. | a. Major tourist transportation routes to downtown(s) have frequent directional signage,<br>b. well-maintained road surfaces,<br>c. and attractively maintained public spaces. | X<br>X<br>X | ☐<br>☐<br>☐ |
| 3. | a. Transportation routes to major attractions have frequent directional signage,<br>b. well-maintained road surfaces,<br>c. and attractively maintained public spaces. | ☐<br>X<br>X | X<br>☐<br>☐ |
| 4. | Shuttle services or taxis and Tourist orientation information are available at transportation terminals | ☐ | X |
| 5. | Tourist traffic congestion and way-finding problems are addressed by transit-based interventions, e.g., municipal transit, shuttle services, People Movers, satellite parking. | ☐ | X |
| 6. | Transit services to core attractions have schedules that accord with attractions' hours of operation. | ☐ | X |
| 7. | a. Taxi drivers have been given service delivery training,<br>b. and briefing on tourist attraction locations. | ☐<br>☐ | X<br>X |
| 8. | All attractions serving the coach tour market have sufficient on-site bus parking,<br>Or there is convenient access to a bus parking/staging area. | X | ☐ |

**APPENDIX B**

| Travel Trade Resources Checklist | | Yes | No |
|---|---|---|---|
| **Attribute** | | | |
| 1. | A complete inventory of receptive tour operators bringing coach or FIT travel to the destination. | X | ☐ |
| 2. | Receptive tour operators have been contacted to identify: | | |
| | a. The attractions, accommodations and other facilities visited, and visitation volumes; | X | ☐ |
| | b. issues e.g., parking, that impair visitation or the visitor experience; | X | ☐ |
| | c. opportunities to improve the visitor experience and increase visitation; and | X | ☐ |
| | d. Other assets that, with additional investment, could attract group tour visitation. | X | ☐ |
| 3. | A local receptive tour operator sits on a Workbook implementation committee. | ☐ | X |
| 4. | A complete inventory of local travel agents serving clientele resident in the destination area has been compiled. | X | ☐ |
| 5. | Travel agents have been contacted to determine: | | |
| | a. Their perceptions of opportunities to package travel experiences within the destination area; | ☐ | X |
| | b. their interest in packaging travel experiences within the destination area; | ☐ | X |
| | c. Their perceptions of opportunities to improve the visitor experience and increase visitation to the area. | ☐ | X |
| 6. | A Local travel agent sits on a Workbook implementation committee | ☐ | X |

# APPENDIX C

| PRODUCT | ◗ | PERFORMANCE | ○ | FUTURITY | ● |
|---|---|---|---|---|---|

## PRODUCT ◗

### A. Distinctive Core Attractors ●

| A1 | ● | | | A2 | ● |
|---|---|---|---|---|---|
| A1.i | ● | A1.vi | ● | A2.i | ● |
| A1.ii | ● | A1.vii | ● | A2.ii | ● |
| A1.iii | ● | A1.viii | ◗ | A2.iii | ○ |
| A1.iv | ● | A1.ix | ○ | A2.iv | ● |
| A1.v | ● | A1.x | ○ | A2.v | ○ |

### B. Quality & Critical Mass ◗

| B1 | ◗ | B4 | ◗ | B6 | ◗ |
|---|---|---|---|---|---|
| B1.i | ◗ | B4.i | ● | B6.i | ● |
| B1.ii | ◗ | B4.ii | ◗ | B6.ii | ◗ |
| B1.iii | ◗ | B4.iii | ○ | B6.iii | ○ |
| B1.iv | ◗ | B4.iv | ○ | B6.iv | ○ |

| B2 | ◗ | B5 | ◗ | B7 | ◗ |
|---|---|---|---|---|---|
| B2.i | ◗ | B5.i | ● | B7.i | ◗ |
| B2.ii | ◗ | B5.ii | ◗ | B7.ii | ◗ |

| B3 | ◗ |
|---|---|
| B3.i | ○ |
| B3.ii | ● |

### C. Satisfaction and Value ○

| C1 | ○ | C2 | ○ | C3 | ◗ |
|---|---|---|---|---|---|
| C1.i | ○ | C2.i | ○ | C3.i | ○ |
| | | C2.ii | ○ | C3.ii | ● |
| | | | | C3.iii | ○ |

### D. Accessibility ●

| D1 | ● | D3 | ◗ | D4 | ● |
|---|---|---|---|---|---|
| D1.i | ● | D3.i | ● | D4.i | ● |
| D1.ii | ● | D3.ii | ○ | D4.ii | ● |
| D1.iii | ● | D3.iii | ● | | |
| D1.iv | ● | D3.iv | ○ | | |
| D1.v | ● | | | | |

| D2 | ◗ |
|---|---|
| D2.i | ● |
| D2.ii | ◗ |

### E. Accommodations Base ●

| E1 | ● | E1.ii | ● |
|---|---|---|---|
| E1.i | ◗ | E1.iii | ● |

## PERFORMANCE ○

### F. Visitation ◗

| F1 | ○ | F2 | ◗ | F3 | ◗ |
|---|---|---|---|---|---|
| F1.i | ◗ | F2.i | ◗ | F3.i | ◗ |
| F1.ii | ◗ | | | | |
| F1.iii | ○ | | | | |
| F1.iv | ○ | | | | |
| F1.v | ○ | | | | |
| F1.vi | ○ | | | | |
| F1.vii | ◗ | | | | |
| F1.viii | ◗ | | | | |

### G. Occupancy & Yield ○

| G1 | ○ | G2 | ○ |
|---|---|---|---|
| G1.i | ○ | G2.i | ○ |
| G1.ii | ○ | G2.ii | ○ |
| | | G2.iii | ○ |
| | | G2.iv | ○ |

### H. Critical Acclaim ◗

| H1 | ◗ | H2 | ◗ | H3 | ◗ |
|---|---|---|---|---|---|
| H1.i | ○ | H2.i | ◗ | H3.i | ◗ |
| H1.ii | ● | | | H3.ii | ◗ |

## FUTURITY ●

### I. Destination Marketing ●

| I1 | ● | I3 | ◗ | I5 | ● |
|---|---|---|---|---|---|
| I1.i | ● | I3.i | ● | I5.i | ● |
| I1.ii | ◗ | I3.ii | ○ | | |

| I2 | ○ | I4 | ● | I6 | ● |
|---|---|---|---|---|---|
| I2.i | ● | I4.i | ● | I6.i | ● |
| I2.ii | ○ | | | | |
| I2.iii | ○ | | | | |

### J. Product Renewal ●

| J1 | ● | J2 | |
|---|---|---|---|
| J1.i | ● | J2.i | ● |
| J1.ii | ● | J2.ii | ◗ |
| J1.iii | ● | | |

### K. Managing within Carrying Capacities ●

| K1 | ● | K4 | ● | K6 | ◗ |
|---|---|---|---|---|---|
| K1.i | ● | K4.i | ● | K6.i | ◗ |
| K1.ii | ◗ | K4.ii | ● | K6.ii | ◗ |
| | | K4.iii | ● | K6.iii | ◗ |
| K2 | ● | K4.iv | ◗ | K6.iv | ● |
| K2.i | ● | | | | |
| K2.ii | X | K5 | ● | K7 | ● |
| K2.iii | ● | K5.i | ● | K7.i | ● |
| K2.iv | X | K5.ii | ● | K7.ii | ● |
| | | K5.iii | ● | K7.iii | ○ |

| K3 | ○ |
|---|---|
| K3.i | ○ |
| K3.ii | ○ |
| K3.iii | ○ |
| K3.iv | ○ |

| | |
|---|---|
| ● | **Yes** |
| ◗ | **Almost** |
| ○ | **No** |
| X | **Not Applicable** |

## GLOSSARY OF TERMS

**Core Activities:** Tourists' activities as they interact with a destination's **core attraction(s)** to create **core experiences.**

**Core Attraction/Core Attractors:** The feature(s), facility (ies), and/or experience which act as the primary motivators for most travel to the destination; the attractions with the most tourist visits in the destination. Core attractions can differ from season to season, as in for example golf vs. skiing at a four seasons resort destination. They can overlap or be distinctly different for differing visitor segments, e.g., fishing on Long Point Bay vs. dining in Port Rowan after a day of fishing; or mass vs. niche segments, e.g., hiking the Lynn Valley Trail vs. joining a guided tour of the specific flora and fauna along the trail.

A core attraction can also be the product of an assemblage of assets all relating to a specific theme, e.g., fish stocks, marinas and bait shops for anglers; or an experience enabled by an assemblage, e.g., a port town experience supported by entertainment, dining and accommodations resources, or a rural getaway experience supported by country road and trail, shopping, dining, and B&B resources.

**Core Experience:** The guest's experience of the **core attraction** or the experience that is itself the core attraction. As classified by Pine and Gilmour[*], the guest's interaction with the attraction occurs along two dimensions: the first capturing the degree of the guest's "absorption of" to "immersion in" the experience; the second capturing the degree of "passive" to "active" participation in the experience.

**DMO:** A Destination Marketing Organization - a generic term for any agency with a mandate to promote and develop tourism in a geographic area.

**FIT:** The Fully Independent Travel market - visitors making their own plans and travel arrangements.

**Memorable Tourist Experience:** A satisfying travel experience that lasts in the guest's memory, typically because he or she was engaged in a deep and lasting (i.e., in an out-of-the-ordinary) manner by their experience of the destination. A high quality tourist experience will be memorable for all the right reasons.

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[*] Pine, J. & Gilmour, J. 1999. *The Experience Economy: Work is Theatre & Every Business a Stage*. Boston: Harvard Business School Press.

**Niche Segments:** Smaller market segments with a travel-motivating interest in a particular type of experience, e.g., a specific interest in good boardsailing opportunities vs. the mass market interest in a more generic sun and sand destination.

**On-Theme Activities:** Activities (uses made of features or facilities) that are related to the core attraction or the **core experience**. For example, if the core attraction is Port Dover beach, on-theme activities could be: dining with a view of the lake; a seadoo rental at the beach. and walking the swimwear shops in the town.

Determining whether an activity is on-theme or not is often more grey than black and white. For purposes of using this framework, activities can be considered “on-theme” when they offer a different way of experiencing the core attraction, derive some of their attractiveness from their physical or logical relationship with the core attraction, or are themselves an intrinsic part of the core experience.

**OTMPC:** Ontario Tourism Marketing Partnership - The partnership between the provincial government and the tourism industry responsible for marketing tourism in and to Ontario.

**Product Positioning Statement:** A brief description of what a product or service does, and its benefits using terms which set it apart from its competitors.

**Receptive Tour Operator:** A travel operator who specializes in packaging travel to the market area in which it is situated, for sale generally to visitors from other geographic market areas; an important resource in understanding market perceptions, needs and opportunities in a destination area.

**Regional Complex:** A term describing the situation in which individual tourism resources in an area are not sufficiently attractive to draw significant tourist visitation by themselves, but as a group attract visitation by virtue of complementing one another and creating a larger whole.

**Supporting Attraction:** Features or facilities that draw guests to the destination area by giving additional but secondary reasons to travel there. Supporting attractions can be primary travel motivators (i.e. **core attractions**) to some markets (typically **niche segments**). They are generally distinguished from core attractions by their smaller number of visitors.

**Travel Agent:** An individual or firm licensed under the Travel Industry Act to offer travel advice and bookings; an important resource in developing packaged travel opportunities in a destination area.

**VFR:** Visiting friends and relatives - an important motivator for tourism travel. It also highlights the importance of marketing to local and regional residents.