



Premier Ranked Tourist Destination Framework

FINAL REPORT

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INTRODUCTION

Ontario's Highlands is one of 13 Regional Tourism Organizations (RTOs) established in Ontario to help implement the recommendations of the 2009 Ontario Tourism Competitiveness Study. RTOs have been set up as independent, industry-led, not-for-profit organizations responsible for working with stakeholders to grow and enhance each region's tourism products, experiences and marketing activities. RTOs help ensure a more coordinated approach is taken for tourism marketing, management and development across the province. The strategy is that by providing regional leadership and coordination, RTOs will help build more competitive and sustainable tourism regions that are better able to attract more visitors, generate more tourism economic activity, and create more jobs across the province.

Ontario's Highlands operates as a not for profit corporation, was established in October 2010 and consists of the counties of Renfrew, Haliburton, Hastings, Lanark, and parts of Lennox, Addington and Frontenac counties. At the outset of its formation the leaders responsible for establishing the organization recognized the need to "inventory" and "assess" the tourism assets within their newly created region. For this reason they utilized the Premier-ranked Tourist Destination Framework knowing that it would deliver a comprehensive picture and provide the information needed to develop plans to both enhance and promote Ontario's Highlands tourism region.

SITUATIONAL ANALYSIS

In the fall of 2010 the Ontario Ministry of Tourism and Culture, using the 2008 Statistics Canada research data, prepared an overview of Ontario's Highlands tourism performance. This summary of tourism data was the only tangible and reliable source of statistical information for the newly formed region. It is presented here to provide a context for the destination development work that will follow as a result of the PRTDF process.

- In 2008, there were 4.1 million visits to Ontario's Highlands, 4.0% of total visits to Ontario. Visitors to Ontario's Highlands spent \$448 million or 2.5% of total visitor spending in Ontario
- Ontario residents account for the vast majority of visits and spending, other Canada residents account for 2% of visits and 3% of spending, U.S. visitors represent 5% of visits and 12% of expenditures, overseas visitors account for 1% of visits and 3% of spending
- Visitors spend an average of \$110/trip. Overnight visitors spend 2.8 times as much as same-day visitors. U.S. visitors spend the most at \$397/trip
- The largest proportion of expenditures was spent on food & beverage and transportation

- Renfrew, Haliburton and Lanark are the most visited counties in Ontario's Highlands, with each receiving 20%-30% of total visitors
- U.S. visitors primarily come from border states (74%) including 31% from New York State
- The top 8 overseas markets represent 78% of overseas visitors. The U.K. is by far the leading overseas source market at 28% of overseas visits
- The majority of visits are overnight visits among visitors of all origins
- Most trips are for pleasure. Other Canada and overseas visitors also visit friends and relatives
- The majority of overnight visitors stay in unpaid accommodations. International visitors are more likely to stay in paid accommodations than domestic visitors
- Occupancy and RevPar have declined slightly over the past few years while ADR has grown slightly
- Ontario's Highlands has lower occupancy, ADR and RevPar than total Ontario
- Ontario's Highlands represents 2% of Ontario's tourism related establishments
- Ontario residents are more likely to participate in outdoor activities
- U.S. visitors engage in a variety of activities, especially outdoor activities
- Overseas visitors are more likely to visit museums, historic sites, etc.

Source: Statistics Canada, Travel Survey of the Residents of Canada 2008, International Travel Survey 2008, Ontario Ministry of Tourism and Culture

PREMIER RANKED TOURIST DESTINATION FRAMEWORK - PROCESS

The Premier-ranked Tourist Destination Framework (PRTDF) was an initiative developed by the Ontario Ministry of Tourism and Culture 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 and Culture established a tool called the Premier-ranked Tourist Destination Framework. This framework assists jurisdictions in assessing their tourist assets, attractions and amenities and allows them to identify opportunities in tourism development.

The Ontario's Highlands PRTDF project is an initiative facilitated by the Ontario's Highlands Tourism Organization, the Ontario Ministry of Tourism and Culture and tourism industry stakeholders. The funding for the project came from the Ontario Ministry of Tourism and Culture.

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.

Contract staff (the audit team) was hired to assist in the completion of the PRTDF resource audit. The resource audit was carried out by the audit team through a comprehensive research process using a variety of tools including the internet, publications scan, telephone interviews and a review of relevant research documents. The team, working with destination marketing organizations, completed an inventory of tourism assets found in the destination using the parameters of the PRTDF workbook.

The tourism consulting firm BRAIN TRUST Marketing & Communications was retained to assist with the project. Using the audit results, they made numerous observations, development of a series of recommendations and prepared the final report. Brain Trust worked with the OHTO transitional board, staff, the audit team and a number of industry stakeholders to validate the findings, observations and recommendations. Based on feedback and comments recommendations for inclusion in the final report were developed.

What is the Premier-ranked Tourist Destination Framework?

The PRDF was developed by the Ontario Ministry of Tourism and Culture (the Ministry) 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 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, Ministry data and various regional reports along with information gathered by the project audit 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 in Ontario's Highlands was made up of three components:

- 1) 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.
- 2) A **Travel Trade Resources Checklist**.
- 3) A **Transportation Resources Checklist**.

Why the PRTDF in Ontario's Highlands?

By undertaking the PRTDF project the leaders in Ontario's Highlands are indicating a desire to move their destination to the next level. Through the OHTO the industry will have an accurate assessment of the destination's strengths and deficiencies and more importantly a clear plan for improvement.

The PrTDF process allows Ontario's Highlands to analyze base data, benchmark areas of improvement for the future and work more collaboratively towards a visitor/customer-first philosophy in destination development for 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 as well as opportunities to work collectively with all involved in tourism. Against the formation of new tourism regions within the Province of Ontario the process was a first step for OHTO in gaining greater understanding and identifying the tourism assets that existed within the newly formed region and to establish a benchmark of development opportunities for OHTO. It was deemed to be an important opportunity to foster greater communication, networking and industry relations within the tourism sector, business community and with several levels of government especially within the context of the newly formed regional tourism organization.

PRODUCT, PERFORMANCE AND FUTURITY, THE THREE ASSESSMENT MEASURES

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

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

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. It is also used as an aid to identify product gaps and opportunities for future product development.

The Transportation Resources Checklist

The Transportation Checklist was completed by the project team using information gathered from local sources.

The Travel Trade Resources Checklist

The Travel Trade Resource Checklist was completed by the project team.

PRTDF FINDINGS

Distinctive Core Attractors

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., a family taking in a festival or event vs. an individual attending a corporate meeting at a resort conference facility ; or mass vs. niche segments, e.g., visiting a Provincial Park for water sports vs. attending a performance of a local dance troupe in Bancroft.

A core attractor can also be a cluster of assets all relating to a specific theme, e.g., dining, shopping, entertainment in downtown Haliburton; or an experience enabled by clustering, e.g., a walking tour in Smiths Falls combined with a cruise on the Rideau Heritage Route.

Ontario's Highlands Core Attractors

- Land Based Outdoor Recreation Experiences
- Water-Based Outdoor Recreation Activities and Experiences
- Recreation Geology Experiences
- Arts, Culture and Heritage Experiences

Core attractors are located throughout the region and offer great potential when considering positioning for Ontario's Highlands. In other regions one could say that "all destinations are not created equally". In Ontario's Highlands there is a good selection of core attractors spread throughout the entire region

Land Based Outdoor Recreation Experiences

Outdoor recreation has played a large part in the make-up of Ontario's Highlands tourism products and experiences for many years. It is at the heart of the region and the reason the destination has attracted so many seasonal residents and cottage 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. Outdoor recreation experiences are not always located in close proximity to visitor services including accommodations, food and beverage and retail establishments; this can prove to be a challenge when attempting to extend length of stay.

The inventory of Outdoor Recreation Experiences included:

- *Hundreds of kilometers of groomed snowmobile trails that are part of the 16,402 kms of the Trans Ontario Provincial Trails system, which connects to 34,262 kms of Ontario Federation of Snowmobile Club prescribed snowmobile trails)*
- *40+ golf courses*
- *15+ summer camps*
- *44 day hike trails*
- *53 mountain bike trails*
- *9 equestrian trails*
- *54 snowshoeing/ cross country ski trails*
- *60+ camping grounds*
- *100+ cottage resort experiences*
- *Two well known downhill ski hills*
- *9 Provincial Parks (operating and non-operating)*
- *6 Conservation Areas*
- *Numerous opportunities to view flora and fauna*

Water-Based Outdoor Recreation Activities and Experiences

Many Ontario destinations offer visitors water based experiences but in Ontario's Highlands water plays a foundational role in much of what the destination offers. 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 Ottawa River is the centrepiece for water based tourism experiences. The region also connects to The Rideau Heritage Route. Ontario's only UNESCO designation that also provides unique water based experiences. These are the reasons the destination receives significant notoriety. Guests can access the water in any number of ways. The long list of waterside accommodations options provides perhaps the most appealing opportunities to experience the area's rich variety of waterways.

The inventory of water-based outdoor recreation activities and experiences includes:

- *Whitewater paddling on the world famous Ottawa River*
- *Other whitewater rivers: Petawawa, Madawaska, Gull and more*
- *5,600 + lakes*
- *Sport fishing - 20 species of fish available for anglers*
- *141 boat launches*

- *Rideau Canal, Ontario's only UNESCO World Heritage Site*
- *Numerous canoe and kayak paddling opportunities*

Recreation Geology Experiences

This is a truly unique collection of tourism experiences that has set the destination apart from its competition. There is a spectrum of opportunities that attract avid rock hounds and accidental tourists. Experiences for the most part are enjoyed at fixed locations throughout the region with critical mass in Hastings and Haliburton Counties.

- *Mazinaw pictographs (Frontenac County)*
- *Frontenac Arch Biosphere - related experiences*
- *Bonnechere Caves, Bonnechere Museum, Ordovician Fossil Capital of Canada*
- *Rock hounding - Marmora Mine Trail, Tour (Hastings County)*
- *Bancroft, the Rock and Mineral Capital of Canada (Hastings County)*
- *Gemboree Annual Rock Hounding Festival (Hastings County)*
- *Silver Queen Mine Tour - Murphy's Point (Lanark County)*
- *Green Mantel Mineral Farm (Haliburton County)*

Arts, Culture and Heritage Experiences

The Arts, Culture and Heritage cluster offers visitors a wide variety of experiences designed to entertain and enrich. Anchored by several specific attractions and annual events the region's 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.

- *70+ agricultural experiences*
- *Northern Lights Performing Arts Pavilion, Haliburton*
- *Haliburton Arts Community*
- *698 Heritage sites and buildings with national, provincial, and regional significance*
- *200+ studios, galleries, arts/crafts shops, studio tours, and theme retail*
- *40+ museums offering interpretation and education on topics ranging from agriculture to voyageurs to logging to military*
- *Railway Museum of Eastern Canada, National Historic Site*
- *Rideau Canal, Ontario's only UNESCO World Heritage Site*

- *Numerous arts, culture and heritage events and festivals*
- *Theatre, 4 – 5 professional companies, Tweed, Sterling, Perth*
- *Aboriginal heritage, the Algonquin First Nations*
- *Genealogy Societies*

Product Attributes

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

The following are findings pertaining to the tourism product attributes for Ontario's Highlands.

- *Attractors are part of a regional complex linked to the physical setting and history of the destination*
- *The destination does not stand out as distinct from its competition*
- *The destination does not have a Product Positioning Statement*
- *Core attractors are relevant to mass and niche tourist markets*
- *Attractors do not attract guests from beyond Ontario's borders*
- *89 % of visitation is from Ontario residents*
- *Attractors do not attract year-round visitation*
- *Attractors offer a limited range of memorable experiences to sustain interest 24+ hrs*
- *Of the 4.1 million visits, 1.8 million were day visits and 2.3 million stayed overnight (It should be noted that the vast majority of overnight visitation can be attributed to those staying in private cottages or visiting friends and relatives)*
- *There are limited tourism options that have appeal to a variety of market segments*
- *Core and on-theme activities are not easy to buy*
- *Many tourism operations close in the off-season*
- *The range of cultural and entertainment options is limited*
- *The range of dining options is limited throughout the region*
- *Few have wine lists of more than 25 labels (exception Perth)*
- *Few have trained and accredited chefs*
- *Restaurants/chefs do not have name recognition beyond the local region*
- *The region does offer a range of shopping opportunities*
- *Some have recognition beyond the local region*

- *The region is not considered "friendly" or "hospitable" offering "value for money" – why...We don't know! Do not do surveys which track guest satisfaction*
- *The nearest major urban market is less than 3 hours away*
- *Population is substantial – 812,135 people*
- *6.5 million people are located within 5 hours of the majority of the region*
- *Drive time from the nearest U.S. border crossing is more than 2 hours*
- *Drive time from the nearest international airport is within 2 hours from the easterly border of the region but more then 3 hours from the westerly border*
- *Travel from nearest urban centre is pleasant*
- *Alternative modes of travel are available but limited to motorcoach, scheduled bus service, chartered shuttle bus, private plane, private automobile*
- *The region does not offer sufficient slips to transient boaters*
- *115 slips are available to transient boaters*
- *The region does offer a variety of accommodations options at a variety of quality levels and price points - 2643 rooms at 315 properties*
- *The region offers 5256 Camping/RV sites*
- *The region includes a limited number of "branded" widely known operators*

Type of Accommodation	# of Properties	# of Rooms/Sites	Price Range
Total RV Park/ Campsites	77	5256	\$8-\$100
Bed & Breakfast	79	257	\$40-\$240
Lodge	35	330	\$42-\$280
Resort Lodge/Hotel	51	312	\$30-\$650
Motel - Independent	49	694	\$25-\$190
Motel - Chain	7	99	\$89-\$129
Hotel - Independent	9	217	\$75-\$320
Hotel - Chain	8	434	\$99-\$230
TOTAL Roofed Accommodation	315	2343	

Performance Attributes

The PERFORMANCE measures identify the extent to which Ontario's Highlands is successful and recognized in the marketplace. By comparing Ontario's Highlands 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 following are findings pertaining to the tourism performance attributes for Ontario's Highlands. All figures originate from the 2008 Travel Survey of Canadian Residents and the International Travel Survey both compiled by Statistics Canada and specific to the tourism region defined as Ontario's Highlands.

- *In the year 2008, the destination attracted 4,059,000 guests, 1,752,000 were one day visits, 2,307,000 stayed overnight, this represents 4% of total visits to Ontario*
- *Overnight guests originated from the following origin markets:*

2,057,000	or	89.2% from Ontario
150,000	or	6.5% from the U.S.
67,000	or	2.9% from other provinces
33,000	or	1.4% from other international markets
- *Day guests originated from the following origin markets:*

1,664,000	or	95% from Ontario
51,000	or	3% from the U.S.
35,000	or	2% from other provinces
2,000	or	.1% from other international markets
- *Visitation is distributed over four quarters with the vast majority of trips taking place in the summer months: Q1 - 12.7%, Q2 - 26%, Q3 - 42.85%, Q4 - 18.38%*
- *Average Occupancy: 53.2% *Source: PKF 2009*
- *Total spending by all tourists on trips in Ontario was \$17.6 billion, the destination's share of total spending by these tourists was 2.5%*
- *Visitors to Region 11 spent \$448 million*
- *Visitors spend an average of \$110/trip, overnight visitors spend 2.8 times as much as same-day visitors, U.S. visitors spend the most at \$397/trip*
- *Overnight visitors spent \$353,730,000, same-day visitors spent \$94,667,000*
- Is not considered a "must see / must do" destination however:
 - Is top of mind for some experiences (rock hounding, canoe/kayaking)
 - Some rankings as "Number 1" or "Top tier"
 - The white water rafting and kayaking found in Renfrew County is unique and some of the best known white water in the world, the region can claim being the "White Water Capital of Canada"
 - Hastings County is the "Gem and Mineral Capital of Canada"

Futurity Attributes

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.

Futurity identifies the extent to which Ontario's Highlands 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 following are findings pertaining to the tourism futurity attributes, those things that will contribute, or not, to the destinations ability to thrive through tourism growth into the future.

- *There is a market demand for the destination's type of offering according to the 2007 Travel Activities and Motivation Study*

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

- *Market demand is further demonstrated by the growth in core activities from 2006 to 2008 with the exception of Outdoor/Sports Activities:*

Activity	2006	2008
Fishing	4,246,000	4,420,000
Boating	2,715,000	6,220,000
Museums/ Art Galleries	3,551,000	3,651,000
Historic Sites	3,252,000	4,449,000
Outdoor/Sports Activities	24,329,000	21,128,000

- *In 2008 the top 5 tourism activities visitors participated in were:*

Activity	# Of Visitors
1. Outdoor/ Sport Activities	1,842,000
2. Natural Provincial Nature Parks	271,000
3. Historic Sites	200,000
4. Festivals and Fairs	123,000
5. Cultural Performances	110,000

- *Destination Marketing Organizations are in place*
 - *Ottawa Valley Tourism Association*
 - *Land O' Lakes Tourism Association*
 - *Lanark County Tourism*
 - *Haliburton Highlands Tourism Organization*
 - *Comfort Country*
 - *Rideau Heritage Route Tourism Association*
- *DMO's are not funded to reach target markets*
- *Marketing strategies are in place in some DMO's*
- *Tracking of marketing objectives is not in place in most DMO's*
- *DMO's do not track influence of marketing on visitation levels*
- *Customer service-training is not in place in most of the region*

PRTDF OBSERVATIONS

- A formal Tourism Destination Development plan should be initiated ASAP
 - To prioritize actions form the PRTD process
 - To incorporate destination development initiatives in one plan
- No clear brand exists – consider developing a product positioning statement, one that differentiates Ontario’s Highlands from other tourism regions in Ontario and beyond
- It is unknown if the destination delivers good service and value for money
 - A comprehensive annual visitor survey is needed
 - Service / Experience delivery may be inconsistent
- Day and overnight trip expenditures are below the provincial average
 - Attempt to extend length of stay, peak season travel and cottager revenues should be an area of focus, while at the same time consider opportunities to capitalize on driving shoulder season business
 - Attempts should be made to cluster complementary tourism experiences with accommodation offers in multi-day travel packages
 - Focus should be given at using current underperforming tourism assets that are market ready to attract more visitors or enable exiting visitors to stay longer
 - In addition the destination may explore developing “new reasons to visit” from the list of underdeveloped tourism assets
- Underdeveloped and underperforming assets exist and there is a need to prioritize these assets in partnership with the tourism industry in order that during the implementation phase attention can be directed at the assets that will generate the greatest return in terms of tourism visitation and revenues
 - Initial attention should be given to assessing the opportunities associated with the Recreational Geology asset and leverage the work being done through the priority project
 - DMO’s have also provided a list of what they deem to be their underdeveloped tourism assets: see below.
 - This list represents a combination of experiences and opportunities. We have indicated those experiences and opportunities that hold the greatest potential in terms of tourism market readiness, potential and viability of happening in the near term.

COUNTY	UNDERDEVELOPED TOURISM ASSETS <i>As identified by each DMO</i>	Tourism Potential/ Viability 1 – 5 (5 = High)	ATTRACTOR AFFILIATION
Lanark	<ul style="list-style-type: none"> • Trails Inventory – leverage into packages 	5	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Public Docking at Rideau Ferry 	4	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Railway Museum Proposal 	4	<ul style="list-style-type: none"> • Heritage
	<ul style="list-style-type: none"> • Interpretation Tours and Animation of Public Spaces 	4	<ul style="list-style-type: none"> • Culture, Heritage
	<ul style="list-style-type: none"> • Shuttles from Provincial Parks into town 	3	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Develop learning experiences; Dark Skies, Genealogy, Share a Curator 	4	<ul style="list-style-type: none"> • Culture, Heritage
Frontenac, Lennox & Addington	<ul style="list-style-type: none"> • Year-round Tourism Information Centre (junction of Hwy's 7 and 41 as a gateway to Ontario Highlands) 	3	
	<ul style="list-style-type: none"> • Cross country ski trails within Bon Echo Provincial Park 	4	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • 4 season upscale resort that could act as a base for other recreational activities 	2	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Outdoor education programs that guests at accommodation providers could tap into 	3	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Wider selection of year-round family dining options 	2	
	<ul style="list-style-type: none"> • More year-round accommodation options 	3	
Haliburton	<ul style="list-style-type: none"> • Sport Fishing and Angling tourism experiences 	3	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Develop Haliburton County Rail Trail 	4	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Red Cross Outpost Museum – a National Historic Site 	4	<ul style="list-style-type: none"> • Heritage
	<ul style="list-style-type: none"> • Outdoor Recreation Tourism Outfitters 	3	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Mineral Tourism experiences, work has begun 	4	<ul style="list-style-type: none"> • Outdoor Recreation
	<ul style="list-style-type: none"> • Accessibility - Public Transportation options to and within Haliburton County 	2	<ul style="list-style-type: none"> • Outdoor Recreation

Renfrew	• Motorcoach Market (operator training & familiarization, tour development, packaging)	3	
	• Guided Outfitter Services: naturalist/wildlife viewing, hiking, hunting, fishing, snowshoeing, back country ski touring, Ottawa River boat tours	3	• Outdoor Recreation
	• Paddle Sport Outfitters: guided services (canoeing, kayaking, sea-kayaking, etc), rentals, shuttle service to and from waterways	3	• Outdoor Recreation
	• Mountain Biking	3	• Outdoor Recreation
	• Experiential Learning: Aboriginal experiences, astronomical observation/dark skies, bird watching, flora & fauna	4	• Outdoor Recreation, Heritage
	• Meeting Conference Market: resort hotel and convention centre	2	
	• Algonquin Cultural Center	4	• Culture , Heritage
Hastings	• Minerals & Rocks experiences	4	• Heritage
	• Outdoor Recreation experiences	3	• Outdoor Recreation
	• Arts & Culture experiences	3	• Arts, Culture
	• Accommodations	2	
	• Agri-Culinary Tourism experiences	2	
	• Motorsports at Shannonville Motorsport Park	4	
	• First Nations Experiences	3	• Arts, Culture
	• Leveraging the tourism infrastructure in Belleville/Quinte West	2	

- In the immediate term consideration should be given to focus marketing activities on positioning Ontario's Highlands as the ultimate Ontario destination for its current core attractors with priority given to these activities:
 - Land Based Outdoor Recreation Experiences
 - Water-Based Outdoor Recreation Activities and Experiences
 - Recreation Geology Experiences
 - Arts, Culture and Heritage Experiences

- Consideration should be given to conducting specific market research to determine the needs and wants of visitors who are or could be interested in the above recreation experiences as a travel experience in the very near future
 - Conduct research in the Ottawa, Montreal, GTA markets

PRTDF RECOMMENDATIONS

1. As a result of the findings and recommendations made through the Ontario's Highlands PRTDF process the OHTO Board should facilitate the creation of a region-wide Tourism Destination Development Action Plan. This plan becomes OHTO's long-term road map for product and experience development.
 - The PRTDF has revealed numerous opportunities, as detailed in the recommendations below, that would contribute to enhancing the attractiveness of the destination, a Destination Development Action Plan is needed to:
 - Rally the collective tourism industry in Ontario's Highlands around a unified approach to destination development
 - Prioritize the region-wide opportunities from quick wins to long-term development initiatives
 - Establish a context for sub-regional development that supports primary region-wide development initiatives. It must empower sub-regional DMO's to lead the development process within their own destination in partnership with their municipality and tourism industry in order to both enhance the appeal of their destination and the appeal of the region as a whole.
 - OHTO's Board to lead the creation and implementation of the Destination Development Action Plan
 - This is an industry-led process that involves creating a number of Destination Development Task Teams, made up of DMO's, municipal staff and industry representatives directly connected to the specifics of the recommendation
 - Consideration should be given to retaining the services of a 3rd party consultant to facilitate the creation of the Tourism Destination Development Action Plan
2. Use the upside tourism development opportunities revealed in the PRTDF process as articulated in the following recommendations as a reason to encourage tourism stakeholders throughout the region to make an assessment of their individual tourism market readiness. This provides a context for business owners to proactively take steps to enhance or upgrade their own tourism offering.
 - Develop and deliver a series of tourism industry equipping programs that will help upgrade the calibre of tourism business operators within Ontario's Highlands beginning with the delivery of components of the Ministry of Tourism and Culture's Tourism Inc. Training Programme. Follow this with a series of annual training sessions designed to equip the industry to be the best they can be; sessions to include:
 - Tourism Inc. Tourism Business Training
 - Tourism Market Readiness Assessment and Training
 - Tourism Partnership and Packaging Training
 - Tourism Hospitality / Service Training
 - Tourism Experience and Product Development Training

- A two-step approach may be needed: first deliver orientation sessions throughout the region in partnership with DMO's to articulate the merits for regional destination development and second, engage the broadest spectrum of tourism industry stakeholders and inform and educate them on the upside opportunities of making proactive upgrades and enhancements to their individual tourism offerings. Opportunities primarily relate to tourism market readiness issues. Market readiness training will provide operators with a framework in which to assess their own business and strive to adjust their offering to meet the needs of a changing customer base.
3. The OHTO Board to initiate a region-wide destination positioning / branding process to either affirm the destination name (Ontario's Highlands) or create a new positioning and branding strategy that includes a new destination name. The process may include the development of a positioning / branding strategy that clearly explores the merits of a region-wide positioning and brand that supports the family of sub-brands that already exist in the region. For example the strategy should take into consideration the existing value brands like Haliburton Highlands and the Ottawa River Valley bring to the perceptions of the entire region. The positioning / branding process should be conducted in context of current and future marketing activities that will be implemented by the region and sub-regions. It must strive to identify positioning and branding strategy options that clearly differentiates Ontario's Highlands from other regions within the province of Ontario.
 4. In order to clearly understand current service and hospitality delivery levels of those directly or indirectly linked to the tourism experiences offered, a region-wide visitor satisfaction survey must be conducted annually. The survey will track any number of quality and hospitality attributes and initially benchmark service delivery levels and then monitor ongoing progress towards enhancing and upgrading service standards throughout the entire region.
 - Utilize the connections and relationships that local DMO's, Chambers of Commerce and Business Improvement Areas have with tourism stakeholders and empower these entities with the tools to deliver an annual visitor survey
 - Follow the example of other tourism jurisdictions such as Hastings County and utilize their process and questionnaire; Peterborough Kawarthas Tourism has also developed a visitor survey process that can be followed
 - Identify a series of core service performance metrics, benchmark current delivery and then, over time and through front line service training improve the performance of these key service and hospitality metrics. These would include ranking (scale) for things like:
 - Received a warm and friendly greeting / attitude
 - Received value for money, getting more than what was paid
 - Ease of making reservation or buying tickets / admission
 - Would refer friends to visit and intention / likelihood to return
 - Rank service delivery for accommodations, F&B, attractions

5. Develop strategies designed and focused on extending the length of stay of current and future visitors to Ontario's Highlands. Emphasis at identifying clusters of complementary activities that when combined, present visitors with a long list of things to see and do and at the same time as a first option centered around an overnight stay in a paid commercial accommodation and / or secondarily through visiting friends / relatives, as an example:
 - Where possible leverage the long list of annual festivals and events as the core reason for the visit and couple other core tourism experiences with attendance at the festival and event
 - Work with food and beverage providers to include a minimum of one, but ideally 2 meals in the experience

6. Better understand the seasonal and cottage residents located in Ontario's Highlands in order to determine how to best serve these "unique tourists" and begin to understand better ways to leverage their presence for the benefit of the tourism industry within the region
 - Explore partnering with the Federation of Ontario Cottage Associations (FOCA) and the specific cottages associations within Ontario's Highlands in order to conduct a cottagers' survey to help identify the tourism behaviours of these visitors

FOCA is a non-profit, voluntary organization representing over 550 Ontario cottagers' associations plus individual and corporate supporters. For over 45 years, FOCA has been dedicated to supporting the interests of Ontario's waterfront property owners. This is accomplished by providing assistance and leadership to Ontario's cottage associations and to our individual members, and through advocating for the long-term interests of our communities. FOCA promotes sustainable waterfront communities by encouraging positive environmental stewardship, supporting strong community leadership, and through promoting fair and equitable public policy.

7. Create new and / or enhanced reasons to visit Ontario's Highlands by focusing attention on developing the list of underdeveloped tourism assets that are located throughout the region and that are connected to the regions current core attractors. Attention should be directed first at those assets that have been identified as current tourism demand generators, specifically:
 - Land Based Outdoor Recreation Activities and Experiences
 - Cycling
 - Golf
 - Motorsports (ATV, motocross/dirt bikes), snowmobiling
 - Downhill Skiing, snowboarding, x-country skiing, snowshoeing
 - Outdoor Adventure (luge, ice climbing, dog sledding)
 - Water-Based Outdoor Recreation Activities and Experiences
 - Paddling (canoe/kayak)
 - Sport fishing/angling
 - Recreation Geology Experiences
 - Arts, Culture and Heritage Experiences
 - Festivals & events

- Rank underdeveloped assets giving priority to those that represent the greatest potential to impact visitation levels in the shortest period of time
- Confirm conclusions above by undertaking market research that will or will not validate the identified product and experience development ideas, and provide context and content for the development strategies; once validated this becomes the basis for the action plan of OHTO
- Direct regional product development resources; human and financial, to develop those products, experiences and opportunities deemed to have the highest potential for positively impacting Ontario's Highlands tourism visitation and revenue levels (see recommended Implementation Process, page 27)

Tourism Product Clusters – it is recommended development work focus on this list of tourism assets once they are prioritized by the OHTO Board

Ontario's Highlands **Tourism Product Clusters**

Outdoor Adventure

Land Based
Experiences

- Trails
- Golf
- Camping
- Skiing

Water Based
Experiences

- Paddling
- Fishing
- Boating
- Rideau Canal

Recreational
Geology
Experiences

- Mine Tours
- Rock Hounding
- Archaeology
- Petroglyphs
- Bonnechere
Caves
- Gemboree

Arts, Culture, Heritage

Visual & Performing
Arts Experiences

- Theatre
- Galleries
- Music
- Festivals

Heritage
Experiences

- Museums
- Historical Sites
- Rideau Canal
- Attractions
- Genealogy
- Aboriginal
Experiences
- Festivals & Events

Festivals & Events

- Community
Based Events
- Sports Events

PRTDF IMPLEMENTATION

Implementation is a joint activity of the Board, DMO's and the industry at large. It is understood that an organization like OHTO cannot develop the destination on its own. It is the tourism business owners that must take a lead in destination development and the implementation steps identified in the report if progress is to be made. The municipalities, Chambers of Commerce, DMO's within the region also have responsibility to support the efforts of the tourism business owners. Ontario's Highlands has the opportunity to facilitate the collaboration between tourism business owners and agencies towards destination development. Other destinations who have undertaken the PRTDF process have recognized implementation is an industry-led process. Many of those destinations have seen their industry rally around *collective* destination development and stepped up as necessary to get their business and their destination to the next level. That will be the case for Ontario's Highlands.

Implementation in Ontario's Highlands

It is recommended OHTO put in place a destination development implementation process that is both efficient and effective. OHTO requires a simple and straight forward process. The OHTO Board has already identified and prioritized the core experiences they desire to focus on therefore it is recommended the following process be followed:

Product/Experience Task Teams

Identify industry representatives that have knowledge and experience in the identified experience or product and charge them with creating development strategies designed to enhance the appeal and attractiveness of those experiences. Each task team will be populated by individuals who have demonstrated subject expertise and a willingness to serve on the team on a volunteer basis for a period of 12 - 18 months as identified by the DMO's and OHTO Board.

The Mandate of Task Teams:

- Working together to explore opportunities to enhance the attractiveness and appeal of identified and qualified tourism products and experiences found in Ontario's Highlands, this will result in greater interest and ultimate visitation to Ontario's Highlands
- Utilizing the information learned from the OHTO PRTDF process as well as other research develop specific product and experience development strategies that are quantifiable and measurable
- Represent as best as possible the interests of the tourism industry and their sub-regional municipalities in any recommended development strategies; ideally strive to initiate activities that impact all sub-regions within Ontario's Highlands
- Task Teams will take a leadership role encouraging the industry to collectively come together to improve in order to grow tourism visitation and revenues to the region as well as individual operators
- At the outset identify a series of deliverables and regularly report to the OHTO Board on progress

Facilitated by OHTO staff each Task Team will:

- Identify a chair or co-chairs to lead the work of the team
- Attempt to populate the team with representatives from all sub-regions, each team should have a minimum of 8 and maximum of 12 members
- Meet regularly either in person or via conference call (OHTO may choose to supplement meeting costs incurred by members)
- Focus attention on developing strategies that will enhance the attractiveness and appeal of the particular product or experience
- Create a high level operations process with identifiable deliverables
- Be accountable to the OHTO Board and regularly report on progress and activities (the Chair(s) may choose to do this through OHTO staff)
- Establish financial and human resource targets that serve to help meet the deliverables

The following Hasting County example demonstrates how a Product/Experience Task Team functions:

Hastings County Mineral Asset Task Team

The Hastings County PRTDF process identified the following recommendation:

Focus attention on the underdeveloped and underperforming assets found in Hastings County through enhancements to existing and creation of new experiences that drive visitation, among them: The tourism opportunities associated with the Mineral & Rock assets found throughout the region.

The Hasting County Destination Development Committee placed this recommendation high on its list of destination development priorities. They appointed a specific implementation task team to focus attention on this recommendation. The task team comprised a variety of individuals (volunteers) who had been directly and indirectly involved in leveraging the minerals asset experiences from a geological and tourism standpoint throughout the region. The group met on numerous occasions and with the help of a third party facilitator and a County appointed staff resource identified a series of strategies that would lead to the revitalization of this tourism asset so that it would once again be "tourism market ready". Those strategies identified among other things the steps necessary for the rejuvenation of a variety of mineral exploration sites in order to make them attractors for both hobby geologists and the tourist market. The County staff resource, in partnership with the Bancroft Chamber staff person prepared a proposal for the RTO 11 Transition Board. The proposal asked the RTO to financially support its long term Rocks and Minerals tourism development strategy. OHTO became a natural partner in enhancing this underdeveloped and underperforming tourism asset through its investment of human and financial resources.