

Kawartha Lakes

Jump In



City of Kawartha Lakes Draft Destination Development Plan

KWL Advisory Practice & Mellor Murray Consulting
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Our thanks to the businesses, residents and visitors that contributed to the development of this report.

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1. Executive Summary

A Note on COVID-19:

The Destination Development Plan including all research, stakeholder consultation and strategy development was completed throughout 2019 and during the beginning of 2020, prior to the COVID-19 pandemic. The impacts of COVID-19 are expected to have long term implications that will influence how the recommendations and action items detailed in the Destination Development Plan are implemented. The Destination Development Plan has been reviewed with the impacts of COVID-19 in mind and will be a tool utilized in the economic recovery efforts of the local Kawartha Lakes tourism industry

This Destination Development Plan was commissioned by the City of Kawartha Lakes to guide the coordinated efforts of City staff and tourism stakeholders to build upon the sector's significant contribution to the local economy.

The Destination Development Plan identifies those areas with the most potential to augment Kawartha Lakes' natural assets and differentiate the City from competing destinations thus increasing the contribution of the tourism sector to the City's economy. The plan is focused on increasing the spend-per-tourist on an individual trip basis and the overall contribution to the economy as part of a sustainable and diversified economic development strategy.

This report documents the development of the resulting recommendations as outlined in the table below. Phase One included a comprehensive review of the existing policies, strategic plans and research related to Kawartha Lakes' tourism offering. The report includes a detailed analysis of the key visitor profiles for consideration in establishing the Destination Development Plan. Broad stakeholder consultation was a major feature of this study and included a combination of individual interviews (most of which were in-person), focus groups and an on-line survey. A total of 94 key tourism assets in the community were assessed and evaluated based on their visitor draw, duration and potential for off-season activity.

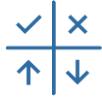
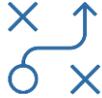
Phase Two of the study included a review of best practices of three communities with similar natural assets and access to major markets. The next step was determining Kawartha Lakes' strengths, weaknesses, opportunities and threats through a SWOT analysis. The SWOT analysis provided the basis of the establishment of strategic priorities. Strategic Priorities are those items that must be addressed in the plan.

The Destination Development Plan culminates with two overriding goals, five strategic objectives and 57 specific actions to achieve the goals and objectives. The implementation plan, in the appendix of this report, outlines the priority (critical, high, medium and nice to do) and recommended timeframe (immediate, short, medium and long term) for addressing the recommended actions.

Phase one

			
Literature Review	Visitor Profiles	Stakeholder Engagement	Asset Identification & Analysis

Phase two

			
Best Practice Review	SWOT analysis	Strategic Priorities	Destination Development Plan

Visitor Profile

A survey of travel patterns¹ for the Kawartha Lakes indicates that overnight visitors represent 60 percent of all visitors and 75 percent of all visitor spending. The main purpose of visitors to Kawartha Lakes is almost equally divided between visiting friends and relatives (VFR) and pleasure visits. A total of 78 percent of all overnight visitors stay at private cottages and homes. Primary activities while in Kawartha Lakes are outdoor and sports activities (53 percent) and visiting friends and relatives (39 percent).

Despite a 26 percent increase in total person visits, total visitor spending increased by just six percent. The average expenditure per person per overnight visit decreased from \$144 per person to just \$81 per person by 2016. Spending on food and beverage

¹ Statistics Canada Travel Survey of Residents and International Travel Survey 2016

increased from \$44.8 million to \$54.5 million in 2016 with the growth primarily in food and beverage sales at stores.

This analysis cross-referenced with the TNS visitor profiles for Kawartha Lakes identified the following seven key visitor profiles for Kawartha Lakes Destination Development Plan.

Highest Potential

Knowledge Seekers



Up and Coming Explorers



High Potential

Family Memory Builders



Sports Lovers



Nature Lovers



Medium Potential

Outgoing Mature Couples



Connected Explorers



Asset Evaluation

A total of 94 key tourism assets were evaluated based on their visitor draw, duration and potential for off-season activity. Based on this analysis the following tourism assets were identified with high potential for further enhancement:

High Potential

- Trent-Severn Waterway Locks: Lindsay Lock 33, Rosedale Lock 35
- Land Based Trails
- Branded Touring Trails Art, Agri-tourism, Food and Beverage
- Water-based Activities: Canoeing, Kayaking
- Land based Activities: ATVs, Mountain Bike
- Outdoor Recreation Events: Road Cycling / Angling

- Provincial Parks: Improved camping facilities/ amenities, extended season
- Entertainment: June/Sept/Oct concerts / theatre
- Culinary/Farm to Table
- Celebrate Winter Festival Young demographic /active outdoor & music
- Main Streets
- B&B Accommodations

The assets and activities identified as lower potential, (because they are already working very well, the projected economic impact is low or the dependence on a specific investor) are as follows:

Lower Potential

- Trent-Severn Waterway Locks: Fenelon Falls Lock 34, Bobcaygeon Lock 32 (already working well)
- Boating (already working well)
- Summer events (summer visitor numbers are already high)
- Fishing (lower visitor spend)
- Hotel/Resort: Limited Service (dependent on an independent investor with specific investment motivations)

Best Practices Analysis

This study includes an analysis of three comparator communities with similar geography and tourism assets to provide some insights into potential approaches and best practices in destination development. The communities of Shawinigan Québec, Skaneateles New York and Muskegon, Michigan were studied and provided the following insights.

The three communities offer a combination of food and beverage, accommodation and cultural amenities. They provide some tourism offerings that merit consideration in Kawartha Lakes.

- Concerts in a natural setting
- A separate website focusing on outdoor activities
- Events celebrating local beer
- A focus on fall and winter season events
- Active winter sport agendas with outdoor competitions
- Winter camping / glamping combined with cross-country skiing and snowshoeing
- Fixed all-season assets: museums and galleries offering off-season tours paired with culinary attractions
- Four-star accommodation options with hotels and B&B's

- Vibrant Main Streets with heritage themes, up-market retail, food and beverage, brewpubs and galleries

Opportunity Summary

Based on the evaluation, the areas with the greatest opportunity for clustered tourism offerings are, cycling, land-based trails and ATV'ing. Those opportunities assessed as having medium potential include canoeing/kayaking, angling, boating and B&Bs. Snowmobiling is assessed as medium to low potential and the resort potential was identified as limited.

Strategic Priorities

The strategic priorities identified for the Destination Development Plan are:

- **Asset development** – building the breadth and depth of tourism assets to encourage greater duration and spend of targeted visitor segments
- **Sustainability** – making environmental and economic sustainability cornerstones of Kawartha Lakes' tourism sector
- **Tourism Development Capacity** – providing the human and financial resources to drive Kawartha Lakes' Destination Development Plan.

Destination Development in Kawartha Lakes should be focused in four areas: Active Outdoor Experiences, Culinary, Culture (include art, music and heritage) and Accommodation.

			
Active Outdoor Experiences	Culinary	Kawartha Lakes' Culture	Accommodation
Boating, paddling, hiking, cycling, camping, angling, etc.	Local food, food markets, food & beverage establishments	Art, music, heritage, festivals & events, agri-tourism and community connections	Rental cottages/homes, b&b, fixed roof, resort

Goals and Objectives

The overriding **goals** of the Destination Development Plan are to:

- Increase visitor spend
- Increase tourism activity outside the summer season

The Destination Development Plan includes five strategic objectives:

Strategic Objectives	
	1. Establish Kawartha Lakes as a leader in outdoor experiences
	2. Build culinary, local culture and accommodation infrastructure
	3. Bundle Kawartha Lakes' offerings to expand draw and duration
	4. Become a leader in sustainable tourism practices
	5. Allocate the appropriate resources to implement the Destination Development Plan

The plan includes 57 specific actions to address these objectives. The implementation plan included in the appendix includes the recommended priority level and timing for all 57 actions.

2. Introduction

The City of Kawartha Lakes commissioned the development of a five-year Destination Development Plan to guide the coordinated efforts of City staff and its tourism partners in growing this important sector of the local economy.

Tourism is an important component of the Ontario economy. The Ontario Ministry of Heritage, Sport, Tourism and Culture Industries estimates that tourism is a \$34 billion industry in Ontario². There were 1.6 million Canadian tourist visits to Kawartha Lakes in 2016³ with spending of \$106 million for food and beverage, transportation, accommodation, retail, recreation and entertainment⁴. Tourism spending helps diversify and stabilize the local economy, creating local jobs and business opportunities. It brings new money into the economy and contributes to the tax base. It also helps attract additional businesses and services to support the tourism industry.

Beyond the economic impacts, tourists can support community services and facilities that would otherwise not be developed and available for residents. It encourages civic

² [Source](#)

³ Data on US visitors and related spending is not available

⁴ Statistics Canada Survey of Residents and International Travel Survey, 2016

involvement, pride and provides cultural exchange between hosts and guest. Tourism encourages community beautification and revitalization and fosters conservation and preservation of natural, cultural and historical resources.

The tourism industry relies on the destination's tourism assets and the marketing of those assets. A Destination Development Plan is a structured approach to identifying and addressing a destination's tourism product offering. Destination Development focuses on the visitor experience as opposed to tourism strategies which are typically dominated by positioning statements and marketing tactics. Destination Development focus on the tourism product that is the subject of the marketing activities.

The Destination Development Plan identifies those areas with the most potential to augment Kawartha Lakes' natural assets and differentiate the City from competing destinations thus increasing the contribution of the tourism sector to the City's economy.

Specifically, this strategy will consider the opportunity to increase the spend-per-tourist on an individual trip basis and an overall contribution to the economy as part of a sustainable and diversified economic development strategy.

2.1 About Kawartha Lakes

The City of Kawartha Lakes has a population of over 75,000 residents and an additional 31,000 seasonal residents. Kawartha Lakes is located 130 kilometres north-east of the Greater Toronto Area and 300 kilometres south-west of Ottawa. The City includes a collection of towns and villages dispersed across 3000 km².

The main population centres are Lindsay, Bobcaygeon, Fenelon Falls, Omemee and Coboconk.

The Kawartha Lakes Economic Development Division within Development Services oversees all tourism activity. One full-time staff person, the Tourism Economic Development Officer, is responsible for product development and the City's tourism marketing efforts. In addition, many other municipal departments and staff contribute to tourism through downtown revitalization, agri-business, arts, culture, heritage and economic development programming and corporate communications.



2.2 Creating a Destination Development Plan

The planning process of the Destination Development Plan consisted of two phases. Phase one included a review of previous strategies and other relevant documents, developing a visitor profile, comprehensive stakeholder engagement and asset identification and analysis.

Phase two included a review of best practices in four comparator communities, an analysis of the City’s tourism asset strengths, weaknesses, opportunities and threats (SWOT) and the crafting of a Destination Development Plan aimed at enhancing the City’s tourism product offering and optimizing the economic impact of the tourism sector. The approved plan will be supplemented with a business case for investment to realize the recommendations of the Destination Development Plan.

Phase one

			
Literature Review	Visitor Profiles	Stakeholder Engagement	Asset Identification & Analysis

Phase two

			
Best Practice Review	SWOT analysis	Strategic Priorities	Destination Development Plan

2.3 Background Strategies and Reports

A review of existing policy, strategic plans and research documents ensures that the Destination Development Plan builds upon the previously established priorities and principles established by the City of Kawartha Lakes. Previous research and strategies prepared by the City of Kawartha Lakes and other strategic partners provided strong direction for the development of the Destination Development Plan. Key documents referenced to create the Destination Development Plan include the following:

- Kawartha Lakes Corporate Strategic Plan (2020-2023)
- Kawartha Lakes Economic Development Strategy (2017)
- Growing Food Tourism in Kawartha Lakes (2018)
- Heritage Master Plan for Kawartha Lakes (2012)
- Kawartha Lakes Strategic Community Improvement Plan (2018)
- Downtown Revitalization Strategic Action Plans (2014)
- RTO8 Consumer Insights Survey (October 2019)
- City of Kawartha Lakes Cultural Master Plan 2020 - 2030 (2020)
- City of Kawartha Lakes Healthy Environment Plan, 2019

The key themes that informed the plan included recommendations related to culture, food, downtowns, incentives, itineraries, visiting friends and relatives and the overall market readiness of the current business mix as follows:

Theme	Key Recommendation
Culture	Improve cultural spaces and places including training for cultural businesses and organizations, focus on authentic local culture and maximize collaboration
Food	Raise profile of food experience, building on unique local places and tastes
Downtowns	Encourage more vibrant downtowns, focus on tourism assets, arts and culture, food and beverage
Incentives	Offer supports for beautification, walkability, signage, support tourism assets and programs
Itineraries	Connect experiences, tourism assets for visitors
VFR	Expand the economic impact of the visiting friends and relatives' visitor market
Market Readiness	Assist businesses to become market ready
Sector Development	Refresh and execute a Destination Development Plan, increase visitor spend and capitalize on visitor experiences that differentiate Kawartha Lakes. Grow the tourism and culture sectors, increasing year-round accommodation, developing operator experiences and guided touring, expanding off-season activity and unique retail, .
Environment sustainability	Protect and enhance the City's natural environment assets, protect water resources, cultivate environmentally friendly transportation options

3. Stakeholder Consultation

The Destination Development Plan was informed by the numerous businesses, associations and related organizations who regularly interact with visitors to Kawartha Lakes. The stakeholder consultation included one on one interviews, focus group meetings and an online survey.

In total there were over 120 interactions with individuals via interviews, three focus groups and an online survey. Some individuals participated in more than one form of stakeholder engagement.

The following section provides a summary of the key insights on Kawartha Lakes' tourist offering based on the stakeholder engagement.

Key Attractions:

The stakeholders indicated Kawartha Lakes' tourism product included a variety of attractions including the Trent-Severn Waterway, active outdoor experiences (hiking, cycling, camping, water-based activities, kayaking/canoeing), Kawartha Lakes' branded tours and Main Street offerings (incorporating arts and culture, outdoor features, food and beverage, local culture).

The Tourism Product Offering

The stakeholders identified a number of ways to enhance Kawartha Lakes' tourism offering:

- Connecting experiences
- Linking experiences geographically
- Enhancing food and restaurant offerings
- Enhancing downtown cores
- Connecting downtowns to the waterfront areas
- Improving market readiness including providing public washrooms, wayfinding, parking and water access
- Providing transportation options to help visitors across Kawartha Lakes

Accommodation

Along with seasonality, the stakeholders said they wanted to increase the accommodation options in Kawartha Lakes.

Events/Activities

Survey participants spoke of the potential for events to drive tourism in Kawartha Lakes but also noted the lack of signature events.

Waterways

Many stakeholders identified Kawartha Lakes' waterways as a key tourism asset for the City. The stakeholders reported that boaters were among the biggest spenders of the various visitor segments. They noted that the boaters' visits are currently limited by a shortage of mooring space.

The stakeholders recommended providing day and evening programming around the locks during peak boating season such as outdoor music to encourage boaters off of their boats, extend the duration of other visitors and encourage incremental spending on retail and food and beverage. They noted that the towns on the waterways could be more visitor friendly by providing public washrooms nearby for boaters and other visitors.

Many spoke of the need to provide greater access to the water through watercraft, kayak and canoe rentals, paddling access to the waterways and additional swimming access. As one individual noted "Tourists are drawn to the water but when they get here (Kawartha Lakes) they can't access it."

Others spoke of expanding waterside accommodation options such as Yurts, to provide easy entry into a camping experience.

Seasonality

Overall, there was support for expanding the visitor traffic outside of the summer. The stakeholders did note however that Kawartha Lakes has not had sufficient interest in off-season events.

Several interviewees indicated that climate change has reduced the area's potential for winter outdoor activity. They said that winter trails used for snowmobiling, cross-country ski or snow shoeing, often lacked appropriate snow in the peak months of January through March.

Summer overcrowding in the main tourism towns was mentioned as a concern by many stakeholders. They reported that sophisticated middle-aged arts and culture visitors were turned off by the large volumes of visitors during summer. Additionally, the large crowds surrounding the Trent-Severn Waterway locks each summer are leading to a perception of 'too busy for me to visit'.

There was significant feedback surrounding the notion of promoting 'serene' winter hiking trails and, specifically, snow shoeing as an activity for all demographics. Snowmobiling was viewed as the most significant spending activity during the winter season, although comments were mixed with respect to the value of this type of activity for the community.

Main Street

The stakeholders reported that the small businesses in Kawartha Lakes' downtowns provided an alternative activity and a break from the visitors' primary leisure activities. Many of the interviews included a focus on additional services and businesses in Lindsay and Fenelon Falls to serve tourists.

Many of the ideas regarding the downtowns required private investment although the stakeholders also referenced the planned downtown reconstruction projects. They said that the upcoming downtown reconstruction would result in an extended period of disruption which may have an impact on visitor spending during the construction periods.

A lack of available parking sites in Lindsay, Bobcaygeon and Fenelon Falls was frequently cited as an issue in the summer peak. There was additional discussion about providing a shuttle service with off-site parking during the busy summer season especially in Bobcaygeon and Fenelon Falls.

Another common theme was the need for additional public washrooms both in the busy 'lock' communities and throughout Kawartha Lakes.

The stakeholders described food and beverage offerings as 'scattered' and suggested there was an opportunity to attract new chefs and restaurant owners by providing rental space for these operations. Some recommended providing incentives for artisan businesses and spoke of the appeal for a younger demographic, who would be attracted to smaller communities in Kawartha Lakes, to own and operate these businesses.

The stakeholders said that Kawartha Lakes was a collection of communities and that each downtown should be developed to build upon its unique character and charm.

A number of interviews spoke about the lack of a strong visitor center offering, commenting on the low profile or presence of the existing operations. The notion of 24-hour digital self-serve visitor installations was most commonly viewed as the solution to this issue. They described existing visitor centers as primarily "brochure racks". Stakeholders described the visitor centres as somewhat outdated as travelers utilize smart phones for current travel information.

Further details of the survey results are included in the Appendix.

4. Visitor Profiles

A key element in establishing Kawartha Lakes' Destination Development Plan is identifying the visitor profiles with the greatest affinity or alignment with Kawartha Lakes' tourism assets. The process includes identifying the visitor profiles who have the greatest alignment with Kawartha Lakes' goals including greater visitor spend and increased activity in the fall, winter and spring seasons. It also includes consideration of the City of Kawartha Lakes' Economic Development Strategy to attract a younger demographic to visit and ultimately live in Kawartha Lakes.

4.1 Statistics Canada Visitor Profiles

Source: Statistics Canada Travel Survey of Residents and International Travel Survey 2016

The Statistics Canada Survey of Residents and International Travel Survey provides a comprehensive profile of Canadian visitors to Kawartha Lakes. Data on visitors originating outside of Canada is not available. The survey data provides a summary of the trip purpose, length of stay, visitor origin accommodation type, the type of activities visitors participated in and visitor demographics.

The data is available for 2012 through 2016. During this time there have been some significant changes in the tourism sector particularly with platforms such as Airbnb and VRBO and explosive population growth in the Greater Toronto Area, which will continue to impact visitor behaviour.

As noted earlier, this survey does not include any measures of the numbers or economic impact of visitors from the US. It has already been established that U.S. based boaters are an important component of Kawartha Lakes' visitors. This group typically stay longer and spend more than many other types of visitors. The information that is available on Canadian visitors does however provide important insights into the current activity and trends for visitors to Kawartha Lakes.

The survey shows that the City experienced a 26 percent increase in total person visits between 2012 and 2016. Overnight visitors make up 60 percent of all visitors and represent 75 percent of total visitor spending. The main purpose of visitors to Kawartha Lakes is equally divided between visiting friends and relatives and pleasure.

The largest share of overnight visitors stay at private cottages and homes. That share has increased from 68 to 78 percent of overnight visits in five years. The vast majority of Canadian visitors (99 percent) are from Ontario with Durham Region, York Region and Simcoe County accounting for 70 percent of all visitors.

The primary activities of visitors are outdoor/ sports activities (53 percent) and visiting friends and relatives (39 percent).

The dominant forms of outdoor activities, in order of person visits, were boating, camping, visiting a beach, canoeing, hiking, and fishing. All these activities experienced increased participation over the five-year period. The largest increases were in canoeing with an 81 percent increase and boating with a 58 percent increase between 2012 and 2016.

Despite a 26 percent increase in total person visits, total visitor spending increased by just six percent. The average expenditure per person per overnight visit decreased from \$144 per person to just \$81 per person by 2016. Spending on food and beverage increased from \$44.8 million to \$54.5 million in 2016 although the largest growth was in food and beverage sales at stores. A more detailed summary of the Visitor Profile data is included in the appendix.

4.2 TNS Visitor Profiles

The visitor statistical information accessed through the 2016 study: **Statistics Canada Travel Survey of Residents and International Travel Survey 2016**, provides context to the volume of visitors by season to the City of Kawartha Lakes. It also serves as an important resource in the application of visitor spending; originating trip from regions within Ontario, as well as providing detail on the significant percent of cottage visitors represented in the overall visitor trip purpose to this destination.

To assist with understanding and analyzing visitors to Kawartha Lakes, they are characterized in a select few groups. These visitor profiles provide perspective on the visitors currently attracted to the destination. They also provide direction to assist in developing future visitor experiences to meet the travel needs and expectations of various target groups.

The **TNS Travel Intentions Study (2014)**, provides visitor profiling and psychographic characteristics associated with travelers within Ontario. It provides tourism practitioners with a proven method of understanding and targeting potential visitor types. The study attributed certain travel interests and requirements for a variety of specific groups; from those with an affinity for a nature/ outdoors experience, to those who favour urban activities such as casino visits and entertainment venues.

The study includes 12 travel segments specifically relevant to the travel experiences offered within Ontario at the time of the study. The profiles that relate most closely to the development potential for Kawartha Lakes are: Knowledge Seekers, Up and Coming Explorers, Family Memory Builders, Sports Lovers, Nature Lovers, Connected Explorers

and Outgoing Mature Couples. The characteristics described in these visitor profiles will be used to determine the degree to which the current and potential assets/ experiences support the development of tourism product over the ensuing five-year period.

Key Visitor Profile Segments for Kawartha Lakes

	<p>Knowledge Seekers</p>	<p>These are older travelers who appreciate and understand the places they visit. Their trips are typically based on expanding their knowledge base through active exploration, as opposed to those who look for relaxation. This category of traveler looks for galleries, museums, and historic sites, and is recognized for spending money on local artisan offerings. This segment represents seven percent of all North American visitors and eleven percent of all traveller’s dollars. Travel budget: above average</p>
	<p>Up and Coming Explorers</p>	<p>This segment is a younger demographic who are entering into a stage of life characterized by increased spending potential and an interest in new travel opportunities. This group, represented by both visible minorities and/or New Canadians as well as offspring of early generation Ontarians, seeks adventure, music events, and energetic travel experiences. The segment represents the fastest growing category of travel throughout the province. Up and coming explorers are often challenged by acquiring transportation to destinations outside of the GTA. This segment represents nine percent of travellers and 14 percent of travellers’ dollars. Travel budget: above average</p>
	<p>Family Memory Builders</p>	<p>This segment includes families with younger children or teens, looking for a playful and event-filled vacation that offers memories from their visit. Although this category is related to families visiting high profile events or theme parks, it also includes the travel group that looks for energetic outdoor activity such as lakes and trails located away from urban centers. This segment represents 14 percent of all travelers and 10 percent of travellers’ dollars. Travel budget: below average</p>

	<p>Sports Lovers</p>	<p>This segment of travelers is seeking a vacation that includes physical pursuits. The dominant feature of this segment is the traveler’s passion for participating in sports and outdoor activity. This segment, consisting of mid to younger females and males, like to cycle, run, hike, and climb on trips away from home. Cross-country skiing, snowmobiling and, to a certain degree, camping also fall into the category. This segment represents five percent of travellers and seven percent of travellers’ dollars. Travel budget: above average</p>
	<p>Nature Lovers</p>	<p>This segment is attracted to outdoor experiences including Ontario’s parks and lakes offerings. Their interests include camping, hiking, canoeing, kayaking, fishing, ATV and bike trails. This segment represents six percent of travellers and four percent of travellers’ dollars. They are typically families with older children and teens. Travel budget: below average</p>
	<p>Connected Explorers</p>	<p>This segment has a psychological need to take a break from the everyday need and be exposed to new experiences and knowledge. The internet and new technologies are key to facilitate their travel interests and experiences. They research, book and share travel experiences through social media before, during and after trips. This segment represents eight percent of travellers and 12 percent of travellers’ dollars. Connected explorers are typically a younger demographic consisting of couples and families. Travel budget: above average</p>
	<p>Outgoing Mature Couples</p>	<p>This segment is made up of seniors and retirees with a desire to maintain their vitality and connection with the world. Not particularly adventurous, they like to interact with travellers and locals alike. The segment represents six percent of travellers and five percent of travellers’ dollars. Travel budget: average</p>

Source: Modified from TNS Applying Consumer Insights to Attract North American Visitors, 2014.

4.3 Visiting Friends and Relatives

Visiting Friends and Relatives (VFR) is a form of travel generally defined as travel for the specific purpose of visiting friends or relatives. It is distinct from other recreation or business travel and typically includes the accommodation utilized at the friend or relatives' residence or cottage.

VFR travel has in past decades not been a strategic focus, for destination marketers as the bulk of a tourism organization's budget was derived from hotel contributions in the form of a mandatory lodging levy. Furthermore, hotel associations in most urban centers have, legitimately, held the senior positions on a tourism body's Board of Directors.

Additionally, the exponential growth of sharing economy operators, namely Airbnb and VRBO, has altered the landscape of leisure travel and travel accommodation is no longer dominated by the hotel category opening.

VFR travel expenditures differ from the typical business or leisure segments as the spending is more dispersed throughout the community beyond the physical hotel location in a 'hotel strip' or the downtown core. VFR expenditures are more closely related to that of local residents including expenditures at grocery stores, suburban food and beverage locations etc.

A key factor affecting the spending potential of VFR travel is the propensity for this travel segment to involve a much longer length of stay in a destination. The average length of stay of a VFR tourist is twice as long as the average length of stay of a leisure tourist, and nearly three times as long as the average length of stay of a business tourist.⁵

A study by Ryerson University indicates that VFR travelers create more stable demand year over year than other travellers. It also showed that the spending was more dispersed across the destination and resulted in greater spending of the resident hosts.⁶ In essence, a VFR spend pattern is more similar to that of a local resident in that it tends to replicate the activities of their local host. VFR activity also elevates the resident's knowledge of the community which has an indirect, longer term benefit to the tourism profile and value to the local economy.

The local economy benefits from VFR activity due to the repetitive behavior that results from a traveler visiting an acquaintance. The propensity for a return visit is greater when

⁵ [Source](#)

⁶ Griffin, T. (2013). Visiting friends and relatives tourism and implications for community capital. *Journal of Policy Research in Tourism, Leisure and Events*

a traveler has friends or relatives as residents. Kawartha Lakes, by virtue of its vast number of cabins and cottages throughout the City, has the potential to attract a large number of VFR travelers, even when the hosts do not have the capacity in their own residence or cottage.

Unlike other target groups, local hosts are already familiar with the destinations more well-known attractions and events. They are more likely to see information on the lesser known 'hidden gems' in a destination and the upcoming events.

There is a distinct difference between the visiting friends and the visiting relatives' markets. Travelers visiting relatives tend to be older. They are more likely to go shopping and to spend money on transport, souvenirs, gifts and other shopping. In comparison, travelers visiting friends tend to be younger and tend to spend more on food and drinks and pubs and nightclubs.⁷

Increasingly, destinations are developing strategies to market tourism opportunities to local residents who influence visitor activities. Accommodation providers, attraction owners and event organizers would benefit from an increased level of awareness of their business among local residents. Hosts actively seek out trip itinerary ideas including filters for cost, duration, activities and audience, how to guides for hosting visitors and reviews of local attractions.

5. Asset Analysis

Tourism infrastructure are the elements required to support tourism activity. It consists of commercial elements such as accommodation, restaurants and stores, attractions such as waterways, trails and cultural assets and more fundamental elements such as transportation corridors. Recognizing that the private sector invests in and operates many of the commercial elements which attract and support visitors, the destination government also has a role to identify the necessary elements to support tourism activity and create the environment to support or attract those elements. For example, a community that identifies a need for additional accommodation or conference facilities could conduct a feasibility study, provide incentives for commercial development or even invest in a publicly owned conference centre.

Additionally, the municipality or province could provide support for animating the downtown core through by-law amendments, funding for attractor events or incentives for tourism-related businesses. Infrastructure such as public spaces, wayfinding

⁷ [Source](#)

programs and public docks are further examples of tourism related infrastructure that support tourism activity.

Kawartha Lakes' Destination Development Plan is intended to serve as a working document or guideline to support the destination's tourism asset investment strategy evolving from a detailed analysis of its existing product mix. Ultimately the asset mix is the foundation of the potential destination experiences that attract visitors of various interests and profiles.

Tourism assets are the various tourism infrastructure, activities, programs and people that visitors can experience in the destination. They are at the core of the reasons people visit a destination. A successful tourism strategy relies on strong marketing and strong tourism product. The best tourism marketing cannot overcome an inadequate tourism product offering. Visitors may be attracted to a destination based on a strong marketing program, but they will not return if their experience does not match or exceed their expectations.

The following analysis provides an assessment of the various tourism assets in Kawartha Lakes. This asset analysis includes the various categories of assets that would typically contribute to the overall tourism asset mix including branded touring trails, land-based trails, waterway facilities, culinary experiences and accommodations.

This asset analysis is not an inventory of all tourism assets in Kawartha Lakes. It is a summary of the typical experiences of visitors to Kawartha Lakes. For example, the City of Kawartha Lakes has various restaurants and bars which serve primarily the local customer, thus do not generate significant numbers of visitors from outside of the area. The assets for analysis were identified based on direction from City staff, consultation with tourism stakeholders and the consultants' in-market assessment.

The asset analysis is based on a combination of the following:

- On site operator interviews
- Interviews with non-operator stakeholders in the municipality (i.e., non-private sector)
- Web site information
- Consultant visits not including operator interviews (e.g., branded trails)
- Research from other locations in Ontario with similar assets

The detailed analysis (included in the appendix) includes an assessment of each asset's draw, duration and off-season potential. The individual assets were rated on a (high/medium/low) scale for draw, duration, off-season potential and market readiness. This assessment helps to identify any signature visitor experiences. The assets for analysis were identified based on direction from City staff, consultation with tourism

stakeholders including a number of businesses and natural assets personally accessed during the consultants' in-market assessment.

Visitor experiences that are deemed to have an 'attractor' status are typically highlighted in the destination's marketing and promotion efforts. The following section outlines the ranking of the current tourism asset categories offered within the Kawartha Lakes destination.

Draw refers to the impact that an asset has in drawing visitors to the destination. The Ontario Ministry of Heritage, Sport, Tourism and Culture Industries have defined a tourist as someone travelling more than 40 kilometres from their residence (one way) or staying overnight. Draw has been further defined below:

Low (1): The attraction is of local interest only and will not draw visitors or may serve as a short stop on the way to somewhere else.

Medium (3): A small number of visitors from outside the area may be drawn to the attraction.

High (5): The attraction is of great interest to visitors from outside of the area and as many as a third of all visitors are from outside the area.

Duration refers to the length of time a typical visitor will want to remain at the tourism asset. For the purposes of this analysis, duration is defined as follows:

Low (1): The typical visitor will remain only a few minutes.

Medium (3): A visitor may spend from an hour to a half day at this attraction and may include a small meal or snack in the destination.

High (5): The attraction is worth stopping for an entire day or overnight with one or more meals.

Off-season potential refers to the asset's access or potential, outside of the peak summer season. The off-season potential as be evaluated as outlined below:

Low (1): The asset is not open or available off-season.

Medium (3): There is limited access or potential for visitors in spring, fall and winter.

High (5): The asset is available year-round.

The detailed analysis of the individual tourism assets is included in the Appendix. The average scores for Draw, Duration and Off-season Potential by category are listed below. The analysis of Kawartha Lakes' tourism assets also includes an assessment of the market readiness of each of the asset categories.

Market-readiness is the degree to which the destination is prepared to meet the expectations of the target customer:

- Low (1):** The sector provides some basic elements of a tourism offering with an outline of what visitors can see or do, hours of operation, a contact phone or email address and branded on-site signage.
- Medium (3):** The sector is actively marketed, operations have a staffed business location and published pricing policies, visitors can communicate with sector businesses or representatives year-round, parking is in close proximity to sites, inquiries can be addressed within 24 to 48 hours.
- High (5):** Stakeholders participate in City tourism efforts, front line staff are trained in customer service, sites/ experiences have high resolution and video footage for promotional purposes, sites are able to accept reservations by phone, or email and provide same day confirmation of booking arrangements.

5.1 Branded Tours

Trent-Severn Trail Towns Kawartha Art and Heritage Trail Legends and Lore Walking Tour Kawarthas Northumberland Butter Tart Tour

These touring assets are key elements in introducing day trip or weekend travellers to Kawartha Lakes. The four themed and branded tours appeal to a mature demographic originating from larger urban centers with an interest in exploring new destinations within driving distance from home. These tours enhance visitor spending in the destination in retail and food and beverage while encouraging longer durations and an overnight stay in Kawartha Lakes. The propensity for off-peak seasonal travel creates additional value from touring trails, as the demographic tends to favour spring and fall weekends for this segment of travel.

The bundling of assets through branded tours represents a significant opportunity to increase the draw and duration of visitors to Kawartha Lakes. This strategy of combining assets has been used successfully by destinations to support tourism assets that are dispersed across a large geographic area such as Kawartha Lakes. It does however often rely on visitors to drive from tourism asset or experience (with the exception of the Legends and Lore Walking Tour). There may be opportunities to connect additional branded tours through boaters (especially ‘loopers’) and cyclists.

Branded Tours

Assessment	Average Score
Draw	4.0 (High)
Duration	3.5 (Medium)
Off-Season Potential	2.0 (Low)
Market Readiness	High

Key Visitor Profiles	
Outgoing Mature Couples	
Knowledge Seekers	
Family Memory Builders, Up and Coming Explorers, Connected Explorers (tied)	

5.2 Active Outdoor Recreation

The Kawartha Lakes tourism offering is defined by its natural environment offering a variety of active outdoor activities for its residents and visitors alike. Kawartha Lakes offers a combination of outdoor experiences ranging from summer camping and beach activity, to the plethora of trails and rugged terrain for those pursuing more strenuous pursuit of cycling, hiking, ATVing, and on/off road long distance running. Kawartha Lakes' combination of gentle and rugged terrain makes it a prime destination for snow mobile and cross-county skiing enthusiasts in the winter season. The City's location just two hours from the GTA makes it a viable option for day and overnight visitors.

The land-based trails and branded touring trails reviewed below are primary 'attractors' for visitors considering a short getaway or a one week or more vacation to an outdoor environment in Southern Ontario.

Land Based Trails

The Victoria Rail Trail, running approximately 60 kilometers through the heart of Kawartha Lakes from Lindsay to Kinmount, serves as an off-road artery for cyclists, hikers, and ATV enthusiasts. In the winter, Kawartha Lakes provides snowmobilers and cross-country skiers departing provided with a weekend outdoor experience that feels far removed from the city.

Kawartha Lakes' Trans Canada Trail, is part of a national network of trails from Atlantic Canada to BC. It traverses the southern part of Kawartha Lakes from Omemee through Lindsay and west through Ontario. The numerous walking segments along the Trail allows visitors to explore the hidden gems in Kawartha Lakes' towns and villages. The Trans Canada Trail is recognized by cyclists as an important off-road artery.

The Somerville Tract, located in the northern sector of Kawartha Lakes, east of Norland, is a circular, nine kilometre trail which serves as a one-day hike suitable for visitors looking for an immersive nature experience. These three examples of land-based trails rank as a substantial visitor draw and duration to Kawartha Lakes due to the more rigorous activity and length of time required on the trails.

Kawartha Lakes' land-based trails are a defining feature of the Kawartha Lakes' tourism product offering and have the potential for even greater profile in the marketing of the destination. The trails are strongly aligned with the target visitor profile and offer flexible single or multi-day activities. The trails have the potential to become an even greater influence on visitor draw and duration.

Land Based Trails

Assessment	Average Score
Draw	3.3 (Medium)
Duration	2.7 (Medium)
Off-Season Potential	3.3 (Medium)
Market Readiness	Medium

Key Visitor Profiles	
Up and Coming Explorers, Sports Lovers, Nature Lovers (tied)	

Waterway Facilities/ Activities

The Trent-Severn Waterway National Historic Site of Canada is a 386-kilometre route of connective rivers, lakes, locks and canals managed by Parks Canada. The Trent-Severn Waterway bisects Kawartha Lakes with lock stations and services for boaters in Bobcaygeon, Fenelon Falls, Rosedale, Lindsay and Kirkfield. The Waterway represents the most valuable asset to Kawartha Lakes in terms of tourism spending. This very busy canal system delivers boaters from throughout North America and beyond and in the summer months with high visitor spending levels. The economic impact of summer boating activity in Kawartha Lakes has a significant impact on fueling the success of tourism businesses located in the towns adjacent to the Trent-Severn Waterway.

One commonly mentioned downside of the impact of the Trent-Severn Waterway is the overcrowding of tourist activity from both boaters and other visitors who line the shores near the five locks to see the constant flow of high-end boats.

The waterways category also includes the numerous lakes with accessible beaches which serve as the main 'attractor' to Kawartha Lakes for four months of the year. While the destination development plan does not require strategies to increase the attraction of visitors to the Trent-Severn Waterway System and the various lake and river assets which bring cottagers, beach goers, and anglers from outside the municipality, the plan may consider opportunities to increase spending by existing boaters or encourage visitors to the waterway assets to visit less visited areas across the entire area.

The Waterways already draw significant summer attraction to Kawartha Lakes. There may be opportunities to expand the draw, duration and market readiness of the Rosedale, Lindsay and Kirkfield locks and increase the visitor spend overall. Kawartha Lakes could also expand the events on the lakes into late Spring and early fall to extend the off-season potential.

The Trent-Severn Trail Towns has the potential to encourage visitors to travel all the locks and establish some interesting experiences around the operation and engineering

of the locks. There is the potential to reflect the unique character of each community and feature the setting and amenities at each lock.

Locks

	Average Score
Draw	2.75 (Medium)
Duration	3.5 (Medium)
Off-Season Potential	1.2 (Low)
Market Readiness	High

Key Visitor Profiles	
Family Memory Builders	
Knowledge Seekers, Outgoing Mature Couples (tied)	
Nature Lovers	
Up and Coming Explorers, Sports lovers, Connected Explorers (tied)	

Beaches

Kawartha Lakes’ tourism image is tied in large part to its many lakes and beaches. Kawartha Lakes is a popular destination for visitors from larger urban centres to enjoy a lakeside escape in the summer months. Kawartha Lakes does not have the large beaches of communities such as Wasaga Beach and Grand Bend, located on the Great Lakes. Instead, Kawartha Lakes offers a more intimate waterside experience that can be paired with other water activities such as paddling and fishing. A key determinate in extending duration for a complete beach and waterfront experience is the access to amenities such as light watercrafts, food and beverage establishments and other activities.

The preservation and attention to environmental elements of Kawartha Lakes’ beaches is a key factor in their continued appeal. Local government has an important role in alerting beachgoers to any risks with respect to clean and safe waters. Programs such as the Blue Flag Certification, provide environmental and water quality standards along with an international eco-certification program. These types of programs have been adopted by communities on the Great Lakes and elsewhere to document and promote the safety and quality of their beaches.

The New Canadian segment, an emerging young demographic primarily located in the GTA with an urban lifestyle, is a desired demographic for destination across Ontario. The duration of these younger beach goers' visits may be impacted by the supply of accommodations to meet their needs. A younger demographic seeking an inexpensive accommodation may be limited by the availability of campgrounds. Younger travellers may also face challenges in finding accommodations as many cottage owners restrict younger groups, especially during the peak summer period. Many cottage rentals also have minimum rentals of one week which eliminates weekend travellers.

In order to increase visitor spend and duration for the summer beach market, Kawartha Lakes will need to connect elements such as evening concerts and entertainment with the lakeside locations. The very popular Highland Cinemas film experience complete with a unique cinema museum tour is one possibility. This experience is very popular with the younger demographic and provides a complimentary activity that will encourage a greater duration of stay. Summer evening concerts targeting the younger demographic are another way to increase duration and spending levels.

Beaches

Assessment	Average Score
Draw	3.4 (Medium)
Duration	2.1 (Low)
Off-Season Potential	1.0 (Low)
Market Readiness	Medium

Key Visitor Profiles

Family Memory Builders, Up and Coming Explorers, Sports Lovers, Nature Lovers (tied)



There are over 40 public boat launch areas and 14 marinas in Kawartha Lakes. Those boat launches that provide parking and proximity to a restaurant after boating have the greatest potential to increase visitor spend and duration in Kawartha Lakes. All public boat launches should have directional signs to parking and population centres (with restaurants, retail and other services) to capture visitor spending.

Boat Launches

Assessment	Average Score
Draw	5.0 (High)
Duration	3.0 (Medium)
Off-Season Potential	1.0 (Low)
Market Readiness	High

Key Visitor Profiles

Family Memory Builders, Up and Coming Explorers, Outgoing Mature Couples (tied)



5.3 Water Based Experiences (canoeing, kayaking, boating and fishing)

A summer visit to Kawartha Lakes is largely defined by its water themed activities. The visitor experience is typically dominated by water-based activities including power boating, canoe or kayaking, swimming or fishing.

There are opportunities to increase visitor duration and overall tourism spend in Kawartha Lakes by enabling easy access to the waterways through the rental of boats, canoes, kayaks and stand-up paddle boards. There is also opportunity to continue to position Kawartha Lakes as an anglers' paradise. The protection and stewardship of its rivers and lakes to sustain the product over future years must be a key element of destination development. Ensuring the pristine waters and environment continues to thrive in future years will maintain its appeal to sport fishing enthusiasts.

Also fundamental to this destination is the visitor experience of being able to access the waterways to find solace in a canoe in a peaceful setting on a river or lake, or in enabling a younger generation to rent boats to access the larger lakes.

The water-based visitor experience throughout the summer and fall seasons will continue to be a differentiating factor for travel to Kawartha Lakes. Key destination attributes such as access to boat rentals, canoes and other forms of enjoyment on the water will continue to position Kawartha Lakes as a desired option for one's summer travel experience.

Canoeing/Kayaking;

Kawartha Lakes' lakes and rivers, particularly in the north/west sector, give the destination a competitive advantage for attracting tourists seeking this experience. A key target is experienced paddlers and a younger demographic wishing to escape urban life. The Gull River route options south or north from Coboconk are an opportunity for serious paddlers with overnight camping at Balsam Lake.

Boating (Powerboating)

Kawartha Lakes is well known for boating within southern and eastern Ontario. The Trent-Severn Waterway access has a very high profile throughout Ontario the United States and Europe.

The Trent-Severn Waterway is part of the 'Great Loop', a system of waterways that encompasses the eastern portion of the United States and Canada. Boaters traveling on the loop are referred to as 'loopers' The looper culture is a recognized contributor to

the boating market in Kawartha Lakes with a high spend impact, particularly in Bobcaygeon and Fenelon Falls. Balsam and Sturgeon Lakes, among others, are popular destinations for boat launching. Other boaters would be considered medium-spend visitors for cottage rentals, groceries, retail and food and beverage.

Angling

Anglers, the more avid and committed recreational fishing enthusiasts, have long recognized Kawartha Lakes as a rich source of a variety of prized fish varieties. Experienced anglers are drawn to the area with its relatively easy access from the GTA and eastern Ontario. Kawartha Lakes is known for muskie; a challenging regional catch and edible fish such as pickerel, small-mouth and large-mouth bass and yellow perch. The angler demographic is deemed to spend at a medium level, due to the propensity to utilize campsites or cottages as location for dining. Ice fishing has been, for years, a popular winter activity but is at risk due to climate change and unreliable ice conditions.

Water-Based Experiences

Assessment	Average Score
Draw	High
Duration	Medium
Off-Season Potential	Low
Market Readiness	High

Key Visitor Profiles

Family Memory Builders, Sports Lovers, Nature Lovers (tied)



5.4 Parks, Outdoor Assets and Activities

Kawartha Lakes tourism product is defined by its summer outdoor assets, from its numerous beaches to its three provincial parks located on lakes. The outdoor camping and lakeside beach experience serves as this destination’s primary visitor draw during the summer season.

Additional outdoor events in the shoulder seasons are required to increase Kawartha Lakes’ profile within its target market.

Two current major active outdoor events: the Kawartha Lakes Classic Cycling Tour and the anglers’ Canada/US Walleye Tournament are significant attractors to the destination and, more importantly, create word of mouth value from its participants.

Assessment	Average Score
Draw	5 (High)
Duration	2.7 (Medium)

Off-Season Potential	1.3 (Low)
Market Readiness	Medium

Experiences (Hiking, Cycling, ATVs, Snowmobiling)

Assessment	Average Score
Draw	3.8 (Medium)
Duration	3.3 (Medium)
Off-Season Potential	2.0 (Low)
Market Readiness	High

Hiking

Hiking is one of Kawartha Lakes' high profile active outdoor activities. It appeals to a broad range of tourists including the 20 to 30-year-old demographic, families and mature, experienced hikers. The combination of rugged and flat terrain in Kawartha Lakes serves the needs of all levels of experience and conditioning. High profile trails include the Victoria Trail (a 50-kilometre trail bisecting the destination), the Trans Canada Trail, a branded attractor for visitors and others such as the Ken Reid Conservation Area, Dunsford Nature Trail and Emily Tract.

Cycling

Cycling is a high opportunity attractor facing some significant competition from other Southern ON destinations (e.g., Collingwood). Kawartha Lakes offers superb cycling terrain, less vehicle traffic outside of summer peak than other locations in southern Ontario. There is a strong, active local cycling culture which can support events targeting GTA. The Kawartha Lakes Cycling Tour is a high-profile event held annually in August. There is potential to develop additional high-profile events in spring and fall.

ATVs

Kawartha Lakes' abundance of trails which suit hiking/cycling activities are also popular with the burgeoning ATV market. There are numerous ATV clubs in Southern Ontario for enthusiasts which also promote safety and environmental sustainability. Common demographics for this activity are families, males age 20+ and middle-aged outdoor enthusiasts. They are typically medium spend visitors.

Snowmobiling

The snowmobile market is a similar demographic to warm weather ATV sector with a similar spend profile. The snowmobile market is at risk of declining activity due to climate change and a diminishing snow season. It is considered a marginal opportunity for growth as Kawartha Lakes cannot compete with communities a few hours north of the City with a longer and more reliable snow season and a greater network of snowmobile trails.

Key Visitor Profiles	
Sports Lovers	
Family Memory Builders and Nature Lovers (tied)	
Up and Coming Explorers	

5.5 Sports and Recreational Facilities

Many of the sport and recreation facilities within the City are designed serve the local community, although specific organizations may host activities that provide some visitor spending.

Two key sport hosting assets are located in Lindsay: the Lindsay Recreation Complex and the Wilson Fields and Ball Parks. Both of these facilities are first class, market ready installations which accommodate regional hockey, court sports, baseball and soccer tournaments.

The supply of limited-service hotel rooms within Lindsay, a requirement for hosting youth sporting events, supports the development of additional sports and recreation tourism activity. Also required are local organizations with the interest and sufficient staff or volunteer resources to host events.

Hosting tournaments is a result of the interest and staffing resources of local sport organizations to bid on potential events in future years.

Sport tourism is a potential growth factor within Kawartha Lakes, although it would require focus and support from the Lindsay community. The future growth of this segment is dependent on support in enhancing the regional profile of Lindsay as a sport hosting center.

Sports and Recreation Facilities

Assessment	Average Score
Draw	3.1 (Medium)
Duration	1.6 (Low)
Off-Season Potential	3.0 (Medium)
Market Readiness	Medium

Key Visitor Profiles

Family Memory Builders, Sports Lovers (tied)



5.6 Festivals and Events

Events contribute to a destination by attracting visitors, providing media exposure, building awareness and stimulating infrastructure upgrades. Destination marketers generally recognize the value of high-profile events or festivals to build awareness of a destination. Large summer music events or a recognized winter festival, held on a regular basis can help to ‘trademark’ a destination. Niche events with close links to the host destination including arts, food drink events and sports events attract travelers of all demographics and encourage VFR visits. Participatory sports events attract competitors and other supporters such as spouses, friends and family members. Large scale cultural events such as Barrie’s Boots and Hearts and Toronto’s Nuit Blanche build the community’s image with target visitor groups.

An attractor event is one that generates attention and draws visitors to the destination. The events can be large or small in scale. The Kawartha Yarn and Fibre festival is an example of a small-scale event that attracts a niche loyal visitor segment with strong appeal outside the local community.

Event tourism includes a marketing orientation attracting tourists in contrast to community events focused on local residents. Community events can develop into tourism events by incorporating a profiled entertainment component that draws interest and visitors from other regions. The bundling of community focused events with Kawartha Lakes’ culinary and agricultural assets pose an opportunity to create a compelling tourist offering that cannot be replicated in another destination and draw visitors from outside the City.

One of the key differentiators for the target visitor market of the GTA with its abundance of entertainment and cultural options throughout the year, lies in the positioning of events within the outdoor natural setting not found in the large urban centers.

Another opportunity for event tourism is the growing demand for green or zero waste events. This approach to events will appeal to the same visitors attracted to Kawartha Lakes’ natural features. Events derived from Kawartha Lakes culinary and agricultural amenities and outdoor experiences are an ideal complement to sustainable events.

Kawartha Lakes boasts a number of high-profile events. Bikefest, Classics on Kent, and the Milk Run all take place in summer while Farmfest is held in October. Long standing

assets such as the Lindsay Exhibition Center and Highland Cinemas continue to add value as a visitor attractor in the peak season period. Investment in developing additional fall or winter activities such as Fenelon Falls’ Santa Day to expand its tourist draw would enhance Kawartha Lakes’ reputation as a key event destination.

The municipality has a role in defining the tourist draw and incremental spend of current festivals and events. The City needs an established process to identify the origin and volume of visitors from outside the region. This information will assist the City in identifying true tourism events and in assisting event organizers from accessing provincial funding and expanding event programming and draw.

This visitor information can include tallying receipts and festival staff comments, on-site visitor intercepts or mobile data collection. Social media interaction is another common method of determining the share of attendees originating from outside the destination. Kawartha Lakes’ can assist event organizers by conducting workshops for local event staff or volunteers on how to measure the number and economic impact of out of town attendees. The City could also provide online event planning resources along with information on municipal requirements for tracking event activity and tourist attendance. It could also provide training on the use of tools such as TREIM, the Tourism Regional Economic Impact Model and STEAM to estimate the economic impact of the events and sporting events respectively.

Entertainment/Events

Assessment	Average Score
Draw	3.7 (Medium)
Duration	1.3 (Low)
Off-Season Potential	1.8 (Low)
Market Readiness	Medium to High

Key Visitor Profiles	
Family Memory Builders and Up and Coming Explorers (tied)	
Ongoing Mature Couples	
Knowledge Seekers, Connected Explorers, Sports Lovers (tied)	

5.7 Main Streets

There is growing recognition of the important role of downtowns, placemaking and the interconnection with tourism and economic development. Placemaking is focused on

creating vital, vibrant and livable communities where people want to live, work and play. Destinations need strong community spaces that attract both residents and visitors.

The Project for Public Spaces outlines four elements required to make a great place:

1. They are accessible and well connected to other important places in the area.
2. They are comfortable and project a good image.
3. They attract people to participate in activities there.
4. They are sociable environments in which people want to gather and visit again and again.⁸

Successful downtown destinations have multiple places addressing these four categories to attract residents and visitors. According to the Project for Public Spaces, a great place has at least 10 things to do. Cumulatively these activities and destinations make a great place. These spaces are further defined by their sociability, uses and activities, comfort and image and access and linkages.

Kawartha Lakes' Main Street assets are situated in the towns of Lindsay, Bobcaygeon, Fenelon Falls and Coboconk. Additionally, Omemee is an attractive and quaint community which attracts visitors to its downtown core and has potential to increase its profile as an entry point for visitors on the way through Kawartha Lakes. All four towns have witnessed an increase in the number of young entrepreneurs seeking to leave the more congested and expensive GTA. The migration of business owners from the larger urban centers to the Main Streets of Kawartha Lakes' towns is evident over the past five years.

Kawartha Lakes' downtown core refurbishments have the significant potential of attracting and engaging tourists in the three seasons beyond the summer peak season. Currently, Lindsay's downtown assets are currently more closely aligned with the needs of its residents. The retail and restaurant offerings in Lindsay would benefit from a closer alignment with the visitors visiting the arts, culture and heritage assets in Kawartha Lakes. The retail sector has the greatest opportunity to drive tourism spending by providing interesting and unique options for visitors. Visitor activity in Lindsay would benefit from greater connection from the Lindsay lock and the downtown through wayfinding or other connections.

In Bobcaygeon, retailers such as Bigley's, coupled with emerging cafes and independent restaurants, attract day trip activity during the spring, fall and winter

⁸ Placemaking, the Project for Public Spaces, www.pps.org/article/what-is-placemaking

seasons. Increased use of public spaces and programs to animate Bobcaygeon’s downtown area would be particularly beneficial during lower traffic periods.

Fenelon Falls has seen an influx of public space improvements along with new retail businesses, restaurants and bars to bring the number of things to do in the summer months above the threshold of 10. The town would however also benefit from increased programs and activities in other periods. Accessibility during the summer months can also be an issue due to traffic congestion. The recently completed parking strategy recommends using wayfinding to help visitors and residents find parking spaces so they can enjoy the downtown area.

There is significant potential for increased visitor spending in all seasons with the continued development of retail, arts, and culinary experiences in Lindsay, Bobcaygeon and Fenelon Falls and Omemee. Municipal events, arts and culture events and promotional activities could all contribute to the activation of downtowns, connecting the tourism demographic and accessing the retail and food and beverage options in the downtowns.

Omemee is home to the well-known Mikael’s Café and is one of several downtowns undergoing refurbishment which is expected to attract greater small business investment. This small community would benefit from a focus on expanding the activities or things to do up to 10.

The branded touring routes also serve to connect the smaller communities and destinations within Kawartha Lakes to provide a compelling product offering.

Main Streets

Assessment	Average Score
Draw	4.0 (High)
Duration	3.6 (Medium)
Off-Season Potential	2.8 (Medium)
Market Readiness	Medium

Key Visitor Profiles	
Outgoing Mature Couples	
Knowledge Seekers	
Family Memory Builders, Up and Coming Explorers, Sports Lovers, Connected Explorers (tied)	

5.8 Arts, Culture and Heritage

Kawartha Lakes has a valued offering of galleries and artisan installations attracting a similar demographic to the branded touring trails. These assets combined with the Globus and Academy Theatres further define Kawartha Lakes' image as a touring destination for the large visitor segment seeking a getaway from the urban centers.

Arts and Culture

Assessment	Average Score
Draw	4.2 (High)
Duration	Medium
Off-Season Potential	Medium
Market Readiness	High

Key Visitor Profiles	
Knowledge Seekers	
Up and Coming Explorers, Outgoing Mature Couples (tied)	
Family Memory Builders, Connected Explorers (tied)	

Arts and Culture Experiences

Assessment	Average Score
Draw	4.3 (High)
Duration	2.7 (Medium)
Off-Season Potential	2.0 (Low)
Market Readiness	High

Key Visitor Profiles	
Knowledge Seekers	
Up and Coming Explorers, Connected Explorers, Outgoing Mature Couples (tied)	

The various heritage assets such as the Dry Stone Wall, Quaker Oats Farm, and Settlers' Village support the interests of visitors seeking arts and culture amenities. The key element to driving further visitor spending within this category will be connecting these experiences to enhance the area's profile with a specific target market.

Heritage

Assessment	Average Score
Draw	3.0 (Medium)
Duration	1.7 (Low)
Off-Season Potential	2.3 (Low)
Market Readiness	Medium

Key Visitor Profiles	
Knowledge Seekers, Family Memory Builders (tied)	
Outgoing Mature Couples	

5.9 Culinary Experience

The Growing Food Tourism in Kawartha Lakes strategy (2018) aims to define Kawartha Lakes with a variety of restaurants and culinary options that allow visitors to immerse themselves in the local culture, agritourism and unique foodways, highlighting local food and drink.

Visitors can enjoy a local farm to table dining experience, promoting long-term sustainability and increasing demand for local food and beverages. A key initiative to promote the local culinary experience is through festivals and culinary events. These events will set Kawartha Lakes apart from other communities. Tourism development will grow and benefit when a critical mass of market-ready local food operators creating a regional product are recognized throughout its visitor catchment region.

The strategy is a platform to support the growth and financial health of local food and beverage producers. The study is intended to create greater awareness and facilitate access to local producers. storytelling is an important element of the strategy. Over the past decade, there has been increased recognition of storytelling to create a greater understanding, appreciation and enjoyment of local offerings.

Continued support and implementation of the Tourism Strategy will strengthen Kawartha Lakes' food offerings and provide a compelling attraction for the majority of the City's key visitor segments including as Knowledge Seekers, Up and Coming Explorers, Connected Explorers, Nature Lovers and Outgoing Mature Couples.

Kawartha Lakes boasts a host of restaurants mostly located in the downtown cores, which attain significant volumes in the peak summer periods. The Riverview Inn in Norland is a particularly well-known destination restaurant serving the summer cottagers in Kawartha Lakes and beyond.

Craft breweries in Lindsay, Fenelon Falls and Bobcaygeon can play a key role in attracting all-season visitors to their respective Main Streets. This fast-growing segment of the food tourism sector has the added benefit of attracting a younger demographic to the area which spend freely on nearby food and beverage and retail businesses.

The City should continue to support the use and highlighting of local produce by Kawartha Lakes’ restaurants through networking and procurement events. Local producers and restaurants should also be encouraged to participate in tourist and cultural events which highlight the use of local products and business.

Culinary Experience

Assessment	Average Score
Draw	3.9 (Medium to High)
Duration	Medium
Off-Season Potential	3.0 (Medium)
Market Readiness	Medium

Key Visitor Profiles	
Knowledge Seekers, Up and Coming Explorers, Connected Explorers, Nature Lovers, Outgoing Mature Couples (tied)	
Couples (tied) Family Memory Builders, Sports Lovers (tied)	

Farmer’s Markets

Assessment	Average Score
Draw	3.8 (Medium)
Duration	1.4 (Low)
Off-Season Potential	1.0 (Low)
Market Readiness	Medium

Key Visitor Profiles	
Knowledge Seekers, Family Memory Builders, Up and Coming Explorers (tied)	

Closely aligned with the culinary experience in Kawartha Lakes is the agri-tourism offerings of South Pond Farms, the roadside stands (many of which are operated by the Mennonite community), the Fenelon Craft Brewery, the Kawartha Choice Farm Fresh non-restaurant offerings and the Zehrs’ Family Amish Farm. These agri-tourism products serve are a strong nucleus of tourism offerings that connect agriculture with the culinary offerings in Kawartha Lakes.

5.10 Accommodation

Kawartha Lakes' tourist accommodation supply consists of fixed roof accommodations (hotels and motels), cottage and home rentals, bed and breakfasts and camping/ RV sites. The largest share of accommodation supply is in private homes and cottages.

Kawartha Lake's fixed roof accommodation supply is primarily made up of limited service hotels based in Lindsay. An upgrade Select Service Holiday Inn product will be added within the next year by the owners of the Days Inn. Both of these properties will provide approximately 250 rooms of good quality product that exists in mid-size communities throughout Ontario.

Overall, the majority of the fixed roof lodging segment, located primarily in the Town of Lindsay, represents an assortment of Limited Service⁹, motel style options. Limited-service accommodations are typically designed for business travellers and do not meet the service expectations of many leisure visitors. Contemporary hotel options are lacking in Bobcaygeon, Fenelon Falls, and communities in the northern region of Kawartha Lakes.

Kawartha Lakes does not have a branded hotel product in Bobcaygeon and Fenelon Falls. The Eganridge Inn and Country Club, located outside of Fenelon Falls, is the lone resort asset currently existing in Kawartha Lakes. The lack of branded hotel development outside of Lindsay is due to the limited hotel demand and owner return on investment during the non-summer seasons.

Investment in a four-season resort, serving a combination of summer upscale travellers and the increasing volume of winter activity enthusiasts, would advance the tourism profile of Kawartha Lakes.

The short-term overnight accommodation market is primarily served throughout much of the municipality by the sharing economy segment, namely Airbnb and VRBO. The vibrant short-term rental market of cottage product represents the largest majority of the Kawartha Lakes accommodation supply.

There is a small supply of high-quality bed and breakfast (B&B) product throughout Kawartha Lakes. B&Bs offers a high level of service in contrast with the large volume of sharing economy overnight rentals.

⁹ Branded limited service accommodations typically have established standards for room size and furnishings as well as amenities or services such as free Wifi, complimentary breakfast, business centres, fitness centres and laundry facilities

Overall, the market will continue to be served by cottage owners offering their product on Airbnb or VRBO sites as the large percentage of overnight demand from the GTA is comfortable with the sharing economy options.

Private Homes and Cottages

Kawartha Lakes has a very strong rental market especially with the growth of sharing economy profiles such as Airbnb and VRBO. There are opportunities to target winter rentals, promoting the solitude on the lakes and engaging and supporting operators and VFR hosts. In 2018, City Council considered by ultimately declined to establish additional controls for short-term cottage and home rentals, providing tacit approval of self-managed tourist accommodations.

B&Bs

Kawartha Lakes is defined by its proximity to natural setting, heritage motif and non-standard building style, incorporating food and beverage, quality and reputation. There are 15 B&Bs in Kawartha Lakes, half of which are in suburban (standard) houses. There is an opportunity to grow its appeal to the arts and culture tourist looking for unique accommodation paired with local food.

Fixed Roof

The fixed roof accommodation in Kawartha Lakes is appropriate for business travelers and sport groups. The lack of branded fixed roof accommodation outside of Lindsay is a result of insufficient demand outside the summer months.

Camping/RV Parks

The camping and RV park market supports an older, wealthier demographic with longer stays. The camping in Balsam Lake and Emily Provincial Park camping is a significant draw. The parks have a great appeal for New Canadians. The supply of RV sites is growing. The camping sector represents a high growth opportunity with a low spend.

Resort

Eganridge Resort is currently the only resort in Kawartha Lakes. Resorts require the appropriate resort property and a motivated investor. The best opportunity in Kawartha Lakes would be to combine with Kawartha Lakes' other key assets or draws. Options include building on the existing golf base at Eganridge, a fishing-oriented resort on one of the many lakes or a wellness resort to capitalize on the growing interest in providing wellness programming in a natural setting.

Key Visitor Profiles

The Lindsay accommodation market serves the corporate traveller including the significant demand from work crews servicing the region. The lucrative conference market existing throughout the surrounding region of the GTA is currently not served by

the existing hotel supply in Lindsay or anywhere in Kawartha Lakes with the exception of the Eganridge Resort.

The recreation facilities within Lindsay create a market for amateur and high school ice, indoor courts, and field sports. Many of the hotels in Lindsay referenced the sport leisure segments as a source of room nights along with social and wedding events.

The largest segment of the overnight market to Kawartha Lakes is served by the private cottage rentals through Airbnb and other sharing economy participants. The visitor profile utilizing this component of the accommodation market is virtually all segments of the travel industry with particular emphasis on Up and Coming Explorers, Connected Explorers and Knowledge Seekers.

An increasing expanding element of the overnight accommodation segment in Kawartha Lakes, particularly during the summer, is the Camping/RV travel segment. The natural beauty and outdoor experience offered in Kawartha Lake lends to travellers seeking an overnight natural setting for their campers and recreational vehicles. Recognizing that this market skews toward the Outgoing Mature Couples and possibly Nature Lovers, the potential for growth across Ontario, and particularly in Kawartha Lakes, is obvious.

The value of the sharing economy inventory offered in Kawartha Lakes is not necessarily price driven, but more a product decision as families or couples can rent an entire house/cottage which affords more space, cooking facilities, and privacy not found in conventional accommodation.

5.11 Additional Opportunities

Kawartha Lakes' proximity to the GTA, natural assets and beautiful setting provide some additional opportunities as a location for film and television production and wellness retreats. These options are explored in the Appendix of this report. A discussion on the potential for a conference centre is also included later in this report.

An obvious consideration for a destination located within two hours of approximately six million people is the development of a regional attraction, typically targeted to families or young adults. Notwithstanding the investment hurdles involved in developing a large-scale business, the financial risk profile related to a tourism attraction is a deterrent.

The comparator community section of the study reflects that the existence of a year-round attraction such as a museum may provide a draw for visitors in the less busy non-summer seasons. The investment in a legitimate 'destination' museum is only going to occur with the involvement of a provincial or federal government, as is noted in the information relating to Shawinigan, Québec. There is potentially a strategy to be adopted by a municipal or regional jurisdiction that considers support in a private or

public facility connected to the heritage of Kawartha Lakes, such as the waterways and boating culture. It is more certain that the primary role of the Municipality is that of an enabler in support of a private venture that has potential to be a visitor draw

6. Connecting Destination Assets with Visitor Profiles

A key element in the creation of a Destination Development Plan involves the connection of a destination's assets to the profiles of those seeking the experiences associated with a destination.

The asset study has identified seven profiles that relate to the Kawartha Lakes current tourism asset inventory. Each of these identified profiles may be now connected to specific categories of Kawartha Lakes' assets in order to move the process on to the recommendation phase of the study.

The asset charts, representing all of the visitor profile categories positioned against the asset groupings, provide the following areas of visitor to asset connectivity, as well as the importance of specific visitor profiles to the Destination Development Plan.

The visitor profiles utilized in the asset study have been separated into three groups of visitor categories: highest, high and medium potential.

The visitor profiles that reflect the highest potential for experience enhancement and potential investment are: Knowledge Seekers and Up and Coming Explorers, Family Memory Builders, Sports Lovers, and Nature Lovers.

The Outgoing Mature Couples and Connected Explorer profiles have marginally less potential for generating greater economic impact than the above five visitor profile categories and will be addressed to a lesser degree in the Destination Development Plan.

The Knowledge Seekers and Up and Coming Explorers visitor profiles have the highest potential in that they relate to the Arts, Entertainment, Main Streets, and Culinary asset categories. The younger demographic Up and Coming Explorers is active in both the Parks and Outdoor and the Sport and Recreation asset groups.

The Sport Lovers, Nature Lovers, and Family Memory Builders visitor profiles are also key targets for Kawartha Lakes due to the connection to all of the natural outdoor activities, particularly the trails which support cycling, ATV's, winter cross-country/snowshoeing. Additionally, the waterways, which define the municipality, connect to these three visitor profiles.

The less time-sensitive Outgoing Mature Couples are recognized as frequent regional travellers. This segment is already well represented in the tourist base in Kawartha Lakes and as a result does not require further development.

The Connected Explorers who are research and digitally driven in the selection of their travel plans clearly connect with various asset groups existing in Kawartha Lakes. They do not, however, utilize the outdoor activity opportunities to the extent of the other five visitor profile categories.

Highest Potential

Knowledge Seekers



Up and Coming Explorers



High Potential

Family Memory Builders



Sports Lovers



Nature Lovers



Medium Potential

Outgoing Mature Couples



Connected Explorers



6. Comparator Communities

A study of practices of destinations with comparable geography and other tourist assets provides key insights into best practices and potential approaches to destination development for the City of Kawartha Lakes. This assessment of comparator destination details three communities with location and seasonality elements that resemble Kawartha Lakes. Each of the three communities are located in states or provinces adjacent to Ontario. They are potential competitors to Kawartha Lakes in that they derive a component of visitor spending from the GTA. These selected destinations offer visitor experiences and have developed assets in periods outside of their peak

summer seasons; an issue that is key to expanding the annual visitor spend in Kawartha Lakes.

The three destinations were selected based on tourism assets similar to that existing in Kawartha Lakes. Assessing the tourism product of alike communities, including the broad strategic initiatives and the marketing outreach to a similar demographic target market, provides context to the potential enhancements to Kawartha Lakes' tourism product offering.

The communities were selected based on the following attributes:

- The natural environment and amenities are a dominant factor and attractor.
- Located within a two to three-hour drive from a major urban center source travel market.
- Has a peak summer tourist season and requires specific development strategies to increase travel interest and spending in the remaining three seasons.
- Does not possess an iconic regional attraction, such as a theme park, or a broadly recognized natural asset attracting tourism from varied source markets.

For the purposes of this review, Kawartha Lakes has been compared to the communities of:

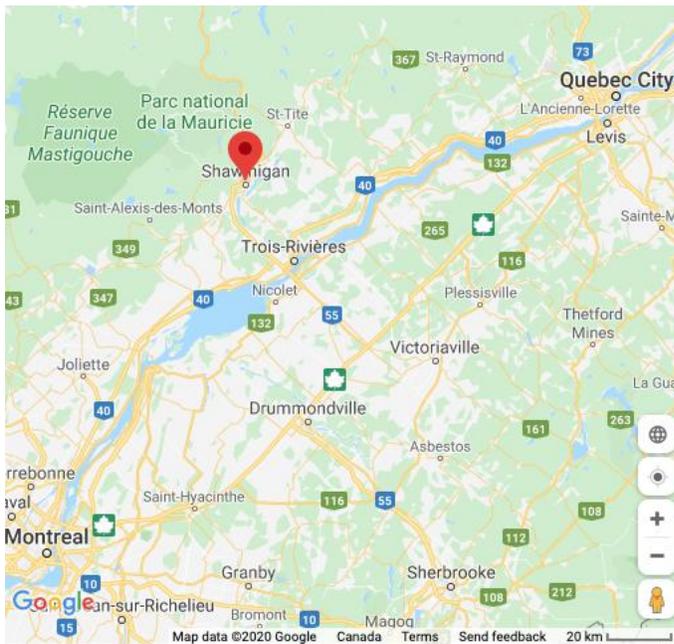
- Shawinigan, Québec
- Skaneateles, New York
- Muskegon, Michigan

Community	Population	Rationale
Kawartha Lakes	75,423	Project Focus
Shawinigan, Québec	54,181	<ul style="list-style-type: none"> • Summer and winter ‘getaway’ destination – Montreal • Vibrant downtown core reflecting both its cultural assets and large selection of popular food and beverage. • Active Outdoor destination: all-season camping and glamping, combined with rugged terrain supporting winter cross-country, skiing, and snowmobiling. • Access to lakes offering summer water activities and a noted ice fishing destination within southern Québec. • Reputation of art, culture and heritage sites. • Winter-season event: Geekcon
Skaneateles, New York	7,209	<ul style="list-style-type: none"> • Gateway to Finger Lakes, NY cottage/boating • 8 annual events: Concert on lakes, Art walks • Agritourism focus, local farm tours, wineries • ‘Norman Rockwell’ downtown core recognized for upmarket retail, antiques, food and beverage • Targeting younger demographic: casino/entertainment complex, craft breweries/wineries
Muskegon, Michigan	38,401	<ul style="list-style-type: none"> • Located two to three hour drive from Detroit and Chicago • Median age of 35 • Known for sand dune beaches, active Outdoor hiking, cycling, boating • Winter sports complex attracting events from mid-north Michigan • Regional arts and culture center outside Detroit • Three museums targeting off-season visits • 30+ art/photography galleries, antique center • Fall: Arts and Drafts Festival attracting young urban visitor • Egelston Lake Festival – use of lakes for concerts

a. Shawinigan, Québec

Overview:

The City of Shawinigan is located an approximate two-hour drive from Montréal along the Sainte Maurice River 30 minutes northwest of Trois-Rivières. Shawinigan has a population of approximately 50,000¹⁰ and is located in Québec’s Maurice County. Shawinigan is similar to Kawartha Lakes, spanning a diverse landscape of forest, mountains, and lakes.



Shawinigan is a summer and winter ‘getaway’ destination for the approximate 1.75 million inhabitants of and southern Québec communities along the St. Lawrence River. It has popular natural features accompanied by the city’s well-known reputation of art, culture and heritage sites. Shawinigan’s vibrant downtown core is home to cultural assets and a large selection of popular food and beverage locations. Shawinigan has a significant inventory of festivals and events which introduce Montreal and other provincial visitors to its varied assets throughout the four seasons.

Shawinigan is also recognized as an adventure travel destination boasting all-season camping and glamping, combined with rugged terrain supporting winter cross-country, skiing, and snowmobiling. It is known for its lakes, summer water activities and ice fishing within southern Québec.

¹⁰ Québec Census 2016

Review of Tourism Assets

Shawinigan draws provincial visitors throughout the year for three key assets:

- Contemporary circus theatre evolving from the success of Cirque de Soleil
- Active outdoor competitions utilizing its waterways and natural hilly terrain. This destination's Canoe and Dragon Boat competitions draw in excess of 50,000 visitors, while boating and cycling events are predominant features of Shawinigan's tourism product
- Art and culture including two museums and summer art throughout the downtown

Three signature summer assets which draw visitors from throughout southern Québec: TreeGO, Parc de L'Île Melville, and the July Tribal Fest sporting event have positioned Shawinigan as a popular choice for families and young adults touring Québec.

Two major circus themed shows: Cirque Eloise and Dragao Acrobat Festival operating each summer are high profile entertainment assets which serve as a focus for destination marketing representing landmark visitor attractors to the destination.

The Shawicon convention targets a younger tech-focused demographic. The winter has developed as a significant off-peak tourism draw from the surrounding urban centers. Promoting local artists throughout Québec is a staple of tourism marketing. Shawinigan is home to a street side Painter's Alley in summer and the Saint Flore Art conference drawing artists and cultural tourists from throughout the province each July.

Shawinigan operates two museum attractions throughout the year; Musée de Jean Chretien and Le cite d'Énergie. Both attractions draw school groups and a broad range of visitors year-round.

Shawinigan targets the regional food and beverage casual traveller with nine mid to high-end restaurants/brasseries and seven cafe/bakeries. Restaurants in Shawinigan including Zele, Café Bucolique and Le Trou du Diable, feature local Québécois cuisine and serve as a regional draw to the destination.

Similar to Kawartha Lakes, Shawinigan is both a summer and winter getaway option located in Québec's cottage country. Shawinigan ranks higher than Kawartha Lakes' accommodation offering of highly ranked bed and breakfasts, and a somewhat larger selection of restaurants and brew pubs. including the highly ranked Broadway Pub.

The accommodation sector includes mostly three-star properties and B&B's including

- Four Full Service: Two four-star and three two-star properties
- Four Limited Service: Three three-star and one two-star properties
- Nine Bed and Breakfasts

The accommodation offering, particularly the bed and breakfasts, are highlighted in destination communications, particularly those well regarded on guest rating sites such as Auberge du Missionnaire, Gite les Petites Pommiers, and Gite Chez Baza. The two four-star hotels: the Domaine St. Flore and the Hotel Marineau Shawinigan provide the destination with signature properties widely recognized on tourism sites.

Tourism Messaging

Shawinigan: *Your source of energy, naturally*

Shawinigan Tourism positions itself as the outdoor enthusiast's destination within Québec. The reference to energy is an indicator of its younger demographic target. The destination is known for its art and culture assets including two museums which have a high profile throughout the province.

The Shawinigan website reflects numerous outdoor competition events primarily in summer months as the winter Québec travel market is very much connected to the downhill skiing centers north of Montreal and Québec City.

A secondary tourism marketing message references the 'quick access to Shawinigan's natural landscapes, and small urban delights like cafes, breweries, shops and fine restaurants.'

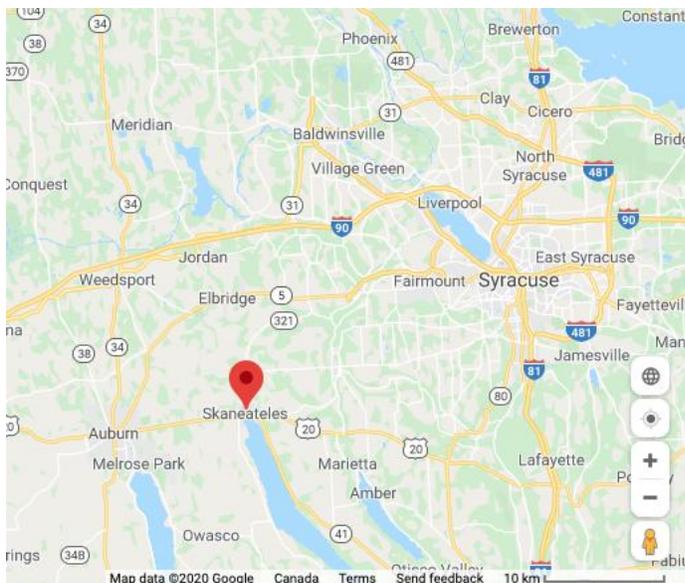
The experiences promoted by the tourism marketers which best define Shawinigan include:

- Four seasons active outdoor activity
- A culture of local culinary farm-table products including craft breweries
- Art and culture including the La Cite de Énergie historical theme park and the Musée de Jean Chrétien
- Shawinigan targets the regional food and beverage casual traveler boasting its mid to high end restaurants/brasseries as well as the cafe/bakeries. The destination is recognized by 'foodies' with four to five well known restaurants featuring local cuisine and fine wines
- Trendy Brew Pubs, attracting visitors seeking a casual lunch or dinner, are highlighted in Shawinigan's tourism messaging attracting the younger active demographic

b. Skaneateles, New York

Overview:

Skaneateles is located in upper, western New York and serves as the unofficial eastern gateway to New York State’s popular Finger Lakes cottage and boating region. It is situated on the shores of Skaneateles Lake, boasting historic downtown shops and galleries housed in restored 19th century buildings. The small upscale town of 2,500 residents swells five-fold each summer as visitors arrive to partake in activities around the popular Finger Lakes, and to visit the small-town retail boutiques, upscale eateries and heritage architecture.



The Finger Lakes District, approximately two hours beyond the Canadian border and 3.5 hours from New York City, serves as a cottage and boating playground during the summer season. The area is also well known for its multitude of wineries drawing visitors in the spring and fall seasons. Skaneateles is a renowned food and agritourism destination, with a calendar of festivals and food and beverage events.

Skaneateles hosts numerous music festivals, a classic boat show, and a regionally acclaimed Dickens Christmas event.

Review of Tourism Assets

Skaneateles Tourism is home to eight major events largely focused on live concerts and art shows. The events take place on Lake Skaneateles or in the town centre. The high-profile festivals include Curbstone, Dickens Christmas and Winterfest take place on Main Street Skaneateles in proximity to its restaurants, antique stores and somewhat exclusive retail shops.

Skaneateles visitors are predominantly middle age, originating from either the GTA, Niagara or upstate New York. It also attracts the Northern Pennsylvania and Ohio visitors in summer. Most visitors are interested in two primary assets beyond the summer lake experience: Skaneateles' well-known shops as well as its popular farmers' markets and local food stands.

Skaneateles competes for the Knowledge Seekers and Outgoing Mature Couples segment of the urban source markets within the Ontario and New York regions. Additionally, the Up and Coming Explorers segment, seeking a summer lake, nature and winery experience, frequents the Finger Lakes region.

This destination has over ten winter hiking and cross-country ski trails providing outdoor activities for the winter getaway. The nearby casino / entertainment center, craft brewery and three Finger Lakes' wineries are added features for a smaller destination with such natural outdoor appeal.

There is an abundance of accommodation options for a small center: seven unique high service inns and nine bed and breakfast options, many of which appeal to upscale middle-aged visitors.

Skaneateles offers a variety of high quality, somewhat formal restaurants throughout its downtown and environs. Lighter fare options include seven café / bakery combinations which provide a quick stop for the traveller.

Skaneateles offers less active outdoor options than Kawartha Lakes but serves as a competitor targeting the GTA two to three-hour getaway drive market interested in arts, culinary experiences and romantic inns.

Tourism Messaging

Skaneateles: A Unique Visit on the Lake

Skaneateles' marketing materials present the destination as a quaint 'Norman Rockwell' village located within the lakes district of Western New York. The marketing materials feature the ambience of Skaneateles downtown heritage buildings, high end shops, antique stores and restaurants. Although the area is a mecca for summer and winter outdoor activity including boating and snowmobiling, Skaneateles targets urban travelers seeking upscale inns and culinary options.



Image Source

Skaneateles does not have the variety and expanse of winter activities compared to Kawartha Lakes, such as cross-country skiing, trail hiking and snowmobiling. The destination is positioned as a visitor destination for Up and Coming Explorers and those seeking a variety of food and beverage quality options setting it apart from many destinations, particularly those located in non-urban regions.

Key experiences which best define Skaneateles and are promoted by the tourism marketers include:

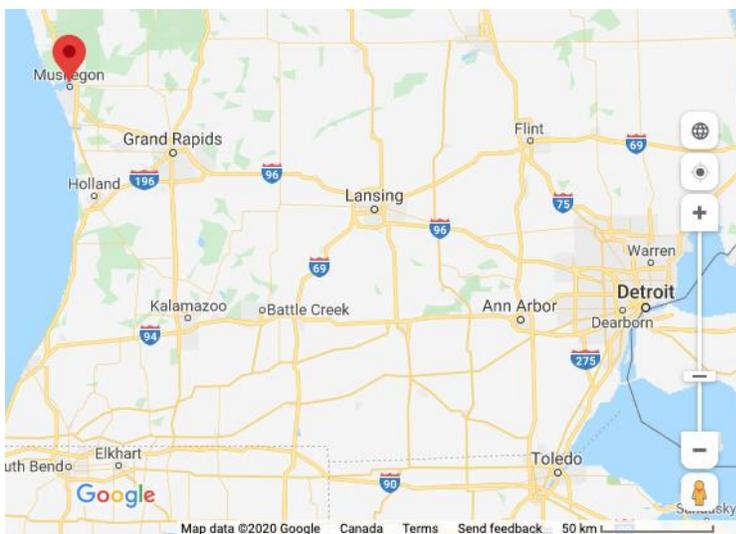
- Historic village with upscale food and beverage and cultural amenities
- Access to outdoor adventure on both lakes and rugged terrain
- Access to the Finger Lakes wine region
- Quality accommodation particularly within the B&B category

c. Muskegon, Michigan

Overview:

Muskegon, population 38,000, is located in north western Michigan on the shores of Lake Michigan, approximately 2.5 hours from Detroit and Chicago. The city is famous for its sand dune beaches and its well profiled fishing within Michigan and Illinois.

Muskegon is a burgeoning municipality with a median age of 35, attracting young families seeking employment and a less hectic lifestyle in comparison to the large urban centers to its south.



Muskegon is an outdoor focused destination, housing a winter sports complex which offers speedskating, luge, and cross-country skiing. Its location on the Lake Michigan shoreline features 26 miles of sandy beaches, well known Pere Marquette Park with a variety of lakeside summer sports, and three state parks with hiking paths and sand dune trails.

The surrounding Muskegon County area attracts recreational boaters and anglers to its numerous inland lakes and rivers. In winter, the Pere Marquette has over two acres of outdoor skating trails, miles of cross-country and snowshoe trails along the Lake Michigan shoreline.

Muskegon is the primary regional arts and culture center outside of the urban centers of Detroit and Chicago. The small city lists over 30 art and photo galleries in addition to numerous antique and heritage shops.

Review of Tourism Assets

Muskegon programs its summer season with a variety of music festivals ranging from rock to chamber music. The Fourth of July Rock Stock Festival combines a rock concert, weekend carnival and holiday fireworks extravaganza. The Egelston Lake Festival running one week later in July, is a family-oriented festival featuring live music for all ages.

Muskegon houses museums such as Muskegon Museum of Art, Jesse Jackson Museum of African American Culture, and the SS Milwaukee Clipper ship museum on its waterfront attract visitors from across Northern Michigan.

Although it is recognized for its winter outdoor activities, the destination does not program festivals celebrating winter similar to that of the Shawinigan and Skaneateles examples.

Muskegon has a variety of craft breweries within the city. It features this burgeoning sector by developing a unique Arts and Drafts Festival held in the fall. This concept serves as an interesting tourist event combining the younger and middle-aged demographic, the City's arts assets and the popularity of craft beer facilities.

Tourism Messaging *Adventure Begins Here*

Muskegon's tag line promotes its outdoor adventure to the target market of the large urban centers of Chicago and Detroit. Muskegon is similar to Kawartha Lakes in that it is located in an expansive natural outdoor rugged region similar to that of Kawartha Lakes northeast of the GTA, however it is much more defined by Lake Michigan in terms of its boating amenities.



Image Source

The water experience on the Great Lakes is clearly not comparable to the numerous lakes and rivers on the Trent-Severn Waterway. However, Muskegon is a larger urban center with more amenities and accommodation options including a conference center, than each of the three towns of Lindsay, Bobcaygeon and Fenelon Falls.

Muskegon Tourism promotes its activities and events with a simple 52-week slide show on its website. All city events that may interest a visitor are presented in an easily accessible manner over the calendar year.

Muskegon has created a *Sports Muskegon* web component which combines its outdoor amenities such as trails, lakes, and beaches with its recreational assets which target competitive amateur tournaments. It positions the destination as an outdoor/ organized sport option for the northern sector of Michigan. Typically, destinations promote organized sports separately from the outdoor/adventure assets.

Within this selection of destinations, Muskegon promotes fall in a significant manner with fall colour tours promoted each weekend in October. Combined with specific promotions of its craft breweries and restaurants, Muskegon recognizes that October is the last month prior late spring to attract visitors, with the exception of specific Christmas events.

Muskegon's destination development includes the presence of indoor assets that draw visitor activity through the entire year. Fixed cultural assets such as museums or galleries offering programming through twelve months serve as a required element in the destination asset mix. Shawinigan, as stated above, benefits from the Province of Québec's investment in both the Musée de Jean Chretien and Le cite d'Énergie museums which adds profile to the destination throughout the year. Shawinigan also hosts fixed installation circus companies that draw families and regional tourists throughout the off-peak seasons.

Muskegon possesses three museums operating year-round which add to its product offering in the quieter winter and spring seasons. It also focuses its marketing on a year-round weekly 'slide show' of events promoting activity in the destination throughout the off-peak periods.

d. Best Practice Considerations for Kawartha Lakes

The analysis of the three comparable communities provides the following observations that can assist in the development of Kawartha Lakes' Destination Development Plan:

- None of the three comparable destinations possess the expanse of natural outdoor amenities such as lakes, trails, and parks for camping, outdoor excursions as exist in Kawartha Lakes.
- Kawartha Lakes' five locks on the Trent-Severn Waterway are strong visitor attractors; an attraction not matched by the other destinations.
- The three destinations have developed signature festivals and events which are promoted prominently by the destination.
- Each destination puts significant focus on its Main Street product which includes numerous food and beverage options and a strong retail presence to target visitor spending.
- Neither Muskegon nor Skaneateles have created a strong off-season event offering.
- Shawinigan has two well-known circus attractions coupled with Shawicon / Geekcon in February. These events and the abundance of winter sport activity positions it as a strong off-season tourism product, driving spending throughout the year.
- The three destinations all utilize their lakeside assets for music concerts in the summer.
- All three destinations have a number of craft brewery outlets and have prominently promoted the local beer experience on their websites. This promotion reflects a recent move in destination development targeting the Up and Coming Explorer.
- The three destinations highlight their unique restaurants and bed and breakfast offering. These assets are of particular interest to Knowledge Seekers and Outgoing Mature Couples visitor segments which are typically high spenders.

The comparator communities also provide some offerings that merit consideration in Kawartha Lakes:

- Concerts on the lake
- Sport Muskegon website featuring outdoor activity focus, supported by related regional sponsors
- Events celebrating local beer
- Focus on fall/ winter season events (e.g., Shawicon/ Geekcon, concerts)
- Active winter sport agenda outdoor competitions

- Winter camping / glamping combined with x-country, snowshoe
- Fixed all-season assets: museum, gallery tours off-season paired with culinary attractions
- Four-star accommodation options hotels and B&B
- Main Street: heritage motif up-market retail, food and beverage, brewpubs, galleries

e. Kawartha Lakes Destination Opportunities

The City of Kawartha Lakes is a dispersed community offering varied travel experiences across a vast area. By comparison, the three destinations offer a concentration of food and beverage, accommodation and cultural amenities within a defined area providing a different visitor experience.

The recent practice of connecting experiences through branded driving routes is an opportunity to create a more robust destination experience, particularly when combined with the local culinary experience. There may be potential for a limited summer peak season transportation offering to connect the three largest towns.

The future revitalization of Main Streets in Lindsay, Fenelon Falls, and Bobcaygeon should result in an enhanced dining, retail and gallery experience and support visitor interest outside of the peak summer period. The addition of smaller-sized lodging options for an up-market traveler, required to support Main Street as a four-season destination. The destinations offer the B&B experience in their downtown cores as well as in the adjacent rural areas. Investment in larger scale hotels depends on lodging brands investment requirement, which include a strong level of demand outside of the summer peak travel period.

The comparator communities use a variety of events or festivals to generate visitor awareness and activity throughout four seasons. All three communities promote food and beverage events such as local brewery festivals, supported by outdoor concerts to attract the casual traveller.

Kawartha Lakes' would benefit from the development and funding of strategic attractor events. It could also build awareness and draw for the active, young GTA demographic by establishing a concert site with entertainment in the fall and winter in an outdoor natural location.

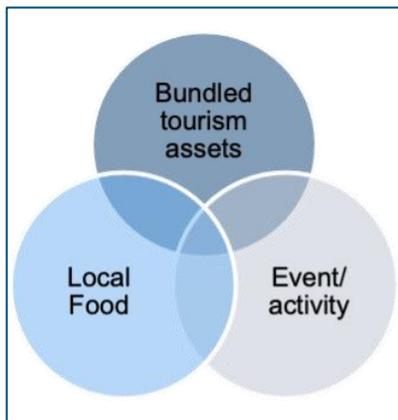
A year-round cultural or sports institution related to the history of the region could drive visitation outside the busy summer season. Museums and cultural institutions can serve as visitor attractors as well as elevating the awareness of the history and culture of Kawartha Lakes. The City could consider the potential of an existing facility for an

expanded role in supporting tourist activity through enhancement of its current assets, along with additional connections with other tourism assets and activities including outdoor activities, local foods and tourism events.

Kawartha Lakes is located relatively close to major source markets in the GTA, eastern Ontario and Québec. It could endeavour to ‘own the winter outdoor experience’. Shawinigan and Muskegon, in particular position the winter getaway out of the large regional urban source markets as a key element of their product development and marketing.

7. Clustered Tourism Offerings

Kawartha Lakes is home to a variety of tourism assets including natural landscapes, outdoor activities cultural installations and quaint and historic downtowns each offering a variety of amenities within their respective Main Streets. The City is the second largest single-tier Ontario municipality in terms of land area at 3,000 square kilometres. The distance between the various tourism assets may be a challenge for the short-term visitor.



Kawartha Lakes’ Destination Development Plan includes a broad strategy to extend visitors’ length of stay and incremental spend. It focuses on an emerging younger demographic typically residing in rental accommodation in the GTA and a more mature demographic with more discretionary income.

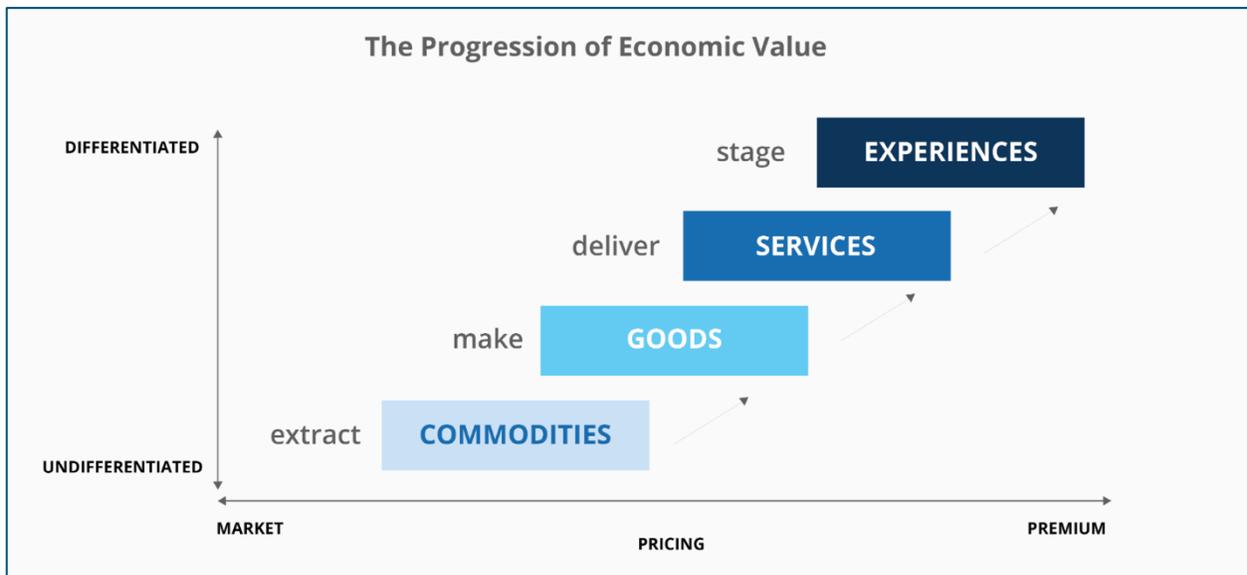
As shown in the tourism asset evaluation outlined earlier in this report, the various tourism assets, when experienced individually may not provide a compelling value proposition to support extended stays and spending in Kawartha Lakes. By building on the branded touring offerings with clusters of culinary, cultural and outdoor activities, natural amenities, events and entertainment, Kawartha Lakes can provide an attractive

tourism product that encourages longer stays, connects with higher spending visitors and supports greater tourism activity outside the summer peak season.

By clustering, the tourism offering in Kawartha Lakes becomes the combination of the visitors' experience with the physical assets, event or activity and the local food.

The following clustered tourism offering illustration provides an example of a cluster of tourism activities and assets including a branded tour such as the Kawartha Heritage and Arts Trail, local food and a special event. While any one of these elements could be deemed to be a visitor 'attractor' on its own, the combination of the three experiences enhances both a broader range of visitor types and the potential for an overnight stay.

Developing and profiling cluster asset groups creates longer excursions including greater demand for overnight stays. The notion of combining travel experiences in such as widespread destination as Kawartha Lakes influences visitor spending particularly when an overnight stay is included.



Source

Clustering tourism offerings also increases the yield or tourism spend while differentiating the tourism offering. By clustering tourism assets Kawartha Lakes can take a standardized offering and customize it to the needs and interests of the individual visitor. Authors Joseph Pine and James Gilmore pioneered the concept of the

“experience economy”¹¹ in 1998. They demonstrated that the economic value of the offering is increased through mass customization or elevating a standard product offering or commodity and creating a unique experience for the visitor. By customizing the experience of the visitor, Kawartha Lakes can differentiate itself from other destinations while providing an experience for which visitors are prepared to pay a premium.

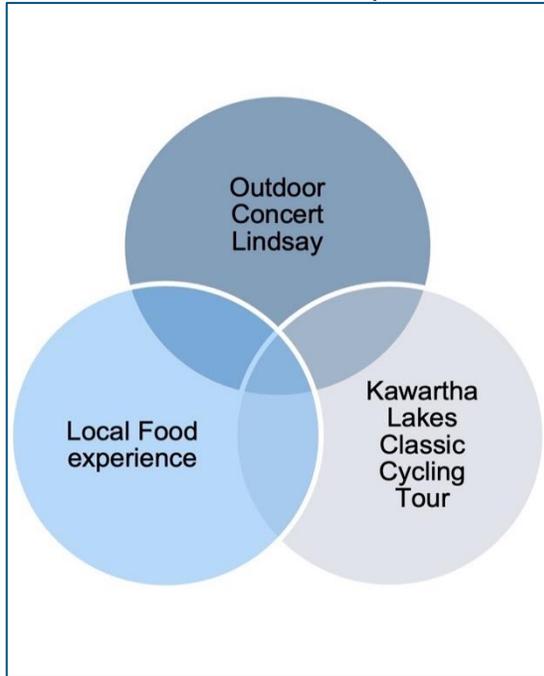
The following clusters, combining the various towns’ retail and food and beverage offerings with an outdoor activity broadens the visitor options for a proposed destination visit. Targeting the active outdoor enthusiast, such as a cyclist, allows marketers to combine the August Kawartha Classic Cycling Tour with scheduled entertainment options such as cultural events or concerts. Kawartha’s culinary tourism product adds a third dimension to the trip planning process. It serves to strengthen the visitor demand potential of the destination.

Retail, food and outdoor recreation



¹¹ The Experience Economy, Competing for Customer Time, Attention and Money, B. Joseph Pine II and James, H. Gilmore, Harvard Business Review (Updated December 2019).

Food, cultural event and sports event



Bundled tourism activities can include branded tours, events or experiences, local food, entertainment and culture, Kawartha Lakes' downtowns, hidden gems throughout the City including restaurants, destination retail, artisans and heritage assets, agri-tourism activities and experiential tourism activities.

Music Festival	Art Tour	Farmfest
<p>A Venn diagram with three overlapping circles. The top circle is dark blue and labeled "Cultural Event". The bottom-left circle is light blue and labeled "Shopping". The bottom-right circle is light grey and labeled "Food & Beverage".</p>	<p>A Venn diagram with three overlapping circles. The top circle is dark blue and labeled "Branded Touring Route". The bottom-left circle is light blue and labeled "Experience / Event". The bottom-right circle is light grey and labeled "Local Food".</p>	<p>A Venn diagram with three overlapping circles. The top circle is teal and labeled "Local entertainment". The bottom-left circle is teal and labeled "Food & Beverage". The bottom-right circle is light grey and labeled "Local Food".</p>

8. Opportunity Review

a. Active Outdoor Experiencers

As previously outlined, clustering visitor experiences has potential to fuel the overall duration and spend within the destination. The cultural assets found on the Arts and Heritage Trail combined with the retail, and food and beverage options within the three primary towns is one example of a tourism cluster which targets specific visitor profiles during the summer and early fall. The developing culinary segment throughout Kawartha Lakes, including participating in a farm to table experience at South Pond Farms, represents an emerging growth segment and valued experience for a combination of visitor profiles and seasons.

Active outdoor experiences are a well-regarded prime attractor for visitation to Kawartha Lakes available in all four seasons. The lakes and waterways support powerboat and paddling enthusiasts in summer months. The cycling routes on paved roads and gravel trails support cycling and ATV activity in spring, fall and summer. The land-based trails also support cross-country skiing and snowmobiling in the winter months.

The younger demographic, ranging from 25 to 35 year of age, residing in the heavily populated Southern Ontario region, is attaining a level of affluence that supports increased travel spending. This wide range of highly active options aligns with their interests and is sure to drive future destination spending. The opportunity lies in Kawartha Lakes' continued focus on maintaining and sustaining the natural assets which define the destination.

The following Active Outdoor pursuits comprise a significant competitive offering within a few hours' drive from large urban centres in Ontario and Québec. These opportunities are described in terms of the infrastructure, seasonality, and visitor profile. The opportunity lies in matching the branding and marketing components to the appropriate demographic targets.

Cycling

Cycling is a rapidly growing recreation and tourist segment. The superb cycling terrain, combination of on and off-road options and low vehicle traffic positions Kawartha Lakes as a priority destination within Southern Ontario. The destination possesses a high profile, active local cycling culture with the ability to facilitate competitions and events targeting participation from the GTA.

The Kawartha Lakes Classic Cycling Tour held annually in late August continues to increase its profile in attracting all cycling skill levels and has the potential to serve as a province-wide signature event for the destination. The event has developed into a

recognized attractor not only for cyclists, but for drawing recognition to Kawartha Lakes for those who may not have previously visited.

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Superb riding terrain • Some routes already established • Long-term commitment to shoulder widening • Active Transportation Plan underway • Additional wayfinding required
Activities	<ul style="list-style-type: none"> • Opportunities for independent travel, group tours, special events
Seasonality	<ul style="list-style-type: none"> • Opportunities for shoulder season travel and events
Visitor Profile	<ul style="list-style-type: none"> • Sports lovers • Middle age • Higher spend
Potential	<ul style="list-style-type: none"> • High

Canoeing/Kayaking

The expanse of lakes and rivers throughout the destination positions Kawartha Lakes at a competitive advantage throughout Southern Ontario within this segment of summer outdoor activity. The less populated northwest sector of the Municipality is a haven for experienced paddlers, particularly a younger demographic escaping summer urban life. The Gull River water routes through Coboconk attract the highly experienced paddler and may have future potential in developing events to increase the area's profile. The access to camping in Balsam Lake Provincial Park supports a longer stay and increased spending in the region.

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Limited municipal rentals starting in 2020 • Highly desirable canoeing, kayaking locations
Activities	<ul style="list-style-type: none"> • Currently limited to independent travelers • Gull River Route north and south of Coboconk for serious paddlers • Opportunity for rentals, outfitters and guides
Seasonality	<ul style="list-style-type: none"> • Summer season

Item	Notes
Visitor Profile	<ul style="list-style-type: none"> • Sports lovers • Up and coming explorers • New Canadians potential • Younger demographic
Potential	<ul style="list-style-type: none"> • Medium

Angling

Angling in Kawartha Lakes is a key asset attracting visitors from the GTA and Eastern Ontario into Québec. The opportunity to challenge the landing of the regional Muskie draws anglers to this region. Well known edible catch including Pickerel, Bass and Yellow Perch attract all levels of anglers and families. The winter ice fishing experience is still relevant although the length of season due to environmental warming is shorter than in past decades. The younger new Canadian residing in the GTA is an emerging sector interested in experiencing Kawartha Lakes' natural environment with weekend fishing excursions.

Another factor with respect to angling in Southern Ontario relates to the younger New Canadian residing in the GTA; a demographic that is rapidly exploring the natural environment in the destination through weekend fishing excursions.

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Recognized strengths • Easy access to GTA and Eastern Ontario market
Activities	<ul style="list-style-type: none"> • Independent • Canada/US Walleye Tournament (May)
Seasonality	<ul style="list-style-type: none"> • Year round – dominated by summer • Ice-fishing at risk due to climate change
Visitor Profile	<ul style="list-style-type: none"> • Nature lovers • Medium spend
Potential	<ul style="list-style-type: none"> • Medium

Land-Based Trails

Kawartha Lakes, with over 600 km of self-directed trails, has the potential to define the destination as an active outdoor target for virtually all types of visitors from experienced hikers, young families, and the young urban sector looking to escape the city. The various terrains from rugged to flat serves the abilities of all levels of experience. The Victoria Rail Trail, Ganaraska Trail and the Kawartha Trans Canada Trail are high profile trails, providing varying levels of hiking experiences for visitors.

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Combination of rugged and flat terrain serving all levels and experiences • High profile assets: Gararaska Trail, Victoria Rail Train, Trans Canada Trail
Activities	<ul style="list-style-type: none"> • Independent travelers
Seasonality	<ul style="list-style-type: none"> • Four-season potential • Hiking, ATVs, snowshoeing, snowmobiling
Visitor Profile	<ul style="list-style-type: none"> • All levels of experience and conditioning • Up and coming explorers, family memory builders, sports lovers, nature lovers
Potential	<ul style="list-style-type: none"> • High

ATVs, Snowmobiling

Kawartha Lakes attracts numerous ATV and Snowmobile clubs due to the abundance of similar trails that attract mountain cyclists and hikers. A range of demographics including families, mature outdoor enthusiasts and the 20-30 predominantly male segment participate in both winter and summer pursuits. The spending profile of this group ranges from medium to high depending on the age group.

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Existing trail network
Activities	<ul style="list-style-type: none"> • Independent travelers • Group travel • Active ATV and snowmobile clubs
Seasonality	<ul style="list-style-type: none"> • Four-season • Snowmobiling under threat due to climate change
Visitor Profile	<ul style="list-style-type: none"> • Male 20+ and middle age demographic • Nature lovers • Snowmobile high spend, more couples • ATVs medium spend
Potential	<ul style="list-style-type: none"> • ATV High • Snowmobile medium to low

Boating (Powerboats)

Kawartha Lakes has a long-standing reputation for boating throughout Ontario, USA and overseas. The ‘Looper’ community, made up of predominantly US based travelers traversing a continuous waterway that connects the Trent-Severn Waterway with inland rivers, the Great Lakes and Gulf Intercoastal waterways, are a valued summer visitor to the area with a high visitor spend in Bobcaygeon and Fenelon Falls. Growing activity on the Trent Severn Waterway has resulting in a shortage of docking.

Additionally, Sturgeon and Balsam Lakes offer additional boat launch facilities. These boaters have a medium to high spend impact, particularly in cottage rentals, grocery, retail, food and beverage.

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Additional boat slips required to address seasonal demand
Activities	<ul style="list-style-type: none"> • Independent travelers at cottages • Strong VFR component • “Looper” cluster • Houseboat rentals
Seasonality	<ul style="list-style-type: none"> • Strictly summer activity
Visitor Profile	<ul style="list-style-type: none"> • Higher spend demographic • “loopers: primarily US based • Family memory builders, outgoing mature couples, up and coming explorers
Potential	<ul style="list-style-type: none"> • Medium

Accommodation

Overnight visitors to Kawartha Lakes have three main accommodation options:

- Conventional fixed roof lodging
- Cottage and home rentals (typically via a web-based platform such as Airbnb and VRBO)
- Camping and RV sites

Standard fixed room accommodation is in short supply outside of Lindsay. Lodging developers have focused primarily on the business travel market clustered in the town of Lindsay. However, north and eastern areas of the municipality have seen the continued emergence of ‘Sharing Economy’ supply with cottage owners renting their premises for overnight stays. Brands such as Airbnb, VRBO, and One Fine Stay have supplied the lodging requirements that the standard accommodation supply does not fulfill.

In the peak summer season, a majority of visitors to Kawartha Lakes are seeking a selection of rentable waterfront properties or campsites with appropriate amenities.

Fixed Roof Accommodation

Limited services hotel for the family market with a moderately priced offering including a suitable guest room, self-serve breakfast and typically an indoor pool are limited outside the town of Lindsay. Lodging brands such as Super 8, Days Inn, Comfort Inn and Hampton Inn have grown in popularity for business and leisure travellers seeking

moderately priced, clean and comfortable accommodation located outside of downtown locations.

Conventional fixed roof accommodation is typically established in locations that can provide stable occupancy rates. Transportation costs and the availability of skilled workers are also considerations in establishing revenue certainty.

The average cost for constructing a limited-service hotel such as the Days Inn in Lindsay is approximately \$140,000 per room. Thus a 90 to 110 room property would require an investment of approximately \$14 million. The debt load for this investment would typically be between 60 and 65%. A lodging developer in Ontario building new limited-service assets would want to ensure predictable occupancy and rate levels to service the debt¹².

Conventional fixed room accommodation is typically located in communities with four season business activity providing stable occupancy and rates for the hotel owner/operators and amateur sport infrastructure to attract sports tournaments and events year-round.

The limited-service accommodations are located in and around Lindsay, the largest community in Kawartha Lakes and the centre of the majority of year-round business and government activity. Lindsay also has the amateur sport facility infrastructure to support sports tournaments and competitions. The summer demand for Bobcaygeon and Fenelon Falls would fill hotels with high rates providing short-term profits for the owner operator from June to labour day. Outside of the peak season however, there would not be sufficient business travel to provide the hotel owner/operator with the required occupancy and rates to justify the investment.

Another key consideration for a prospective investor is the customer mix attracted to the hotel's size and service level. A property located in the heart of Kawartha Lakes' tourism activity near the Trent Severn Waterway would provide seasonal occupancies ranging from 80% in the late June – Labour Day period, to a low of 30% average daily occupancy between January and April¹³.

¹² Canadian Hotel Development Cost Survey 2018

¹³ These figures represent an estimate of hotel occupancies based on the annual leisure travel market demand for the region based on a low corporate travel demand factor as existing hotel room supply in both Peterborough and Lindsay more than satisfies the winter business travel demand for the region.

A prospective hotel developer will also view the high demand for summer accommodation and factor in the desirable cottage rental market on the sharing economy platforms such as Airbnb and other competitors. In many cases, a fully outfitted cottage will be made available throughout the year for similar prices similar to a hotel supply during the peak summer period.

Resorts

Resorts are purpose-built facility targeted to the leisure individual or groups, located on a lake or natural setting away from urban centers. The Eganridge Inn and Country Club located north of Fenelon Falls is the Municipality's sole resort accommodation with a focus on golf during warm weather seasons. Resort properties such as Eganridge usually include meeting facilities, providing an added dimension in non-summer periods to add occupancy and food and beverage revenues.

Attracting a second resort to Kawartha Lakes would require an investor with plans to serve the itinerary warm season traveller and a method of generating revenue in the fall through spring period. Other resorts such as Deerhurst or Grandview in Muskoka run low occupancies in the winter outside of the Christmas season. This type of resort heavily relies on meetings and conference business in the Fall and winter to maintain minimum occupancies required to finance the operation. Additionally, summer properties in Muskoka attain peak season rate levels at the highest level in the Province. Investors would also consider that the overall demand and room rate expectations for customers in Kawartha Lakes would be lower than the Muskoka.

The development of a niche resort product in Kawartha Lakes targeting the outdoor enthusiast, such as anglers, hikers or snowmobilers could be a consideration for an investor. This type of investment would most likely require a local or regional well-financed resident with a long-term return-on-investment perspective who is prepared to market and engage significantly with Ontario's outdoor associations.

In this scenario, a themed resort outfitted for sport and outdoor guests could potentially attract a four-season clientele and support a well-run cost-driven business. This type of venture would require appropriate meeting space at a competitive price in order to attract fall through spring groups and regional associations and compete with meeting facilities located in Collingwood or Muskoka.

RV Parks

Another accommodation option that has gained traction with the mature travel market is the RV Campground experience including Lonesome Pine in Bobcaygeon and Beaver Narrows in Omemee. This segment of the market consists of higher spending visitors. This segment has extended length of stay in summer or late spring/early fall, exceeding

any other visitor profile in Ontario. They are an older more financially stable demographic with the leisure time to enjoy a mobile lifestyle.

The relatively low cost of development of RV parks with appropriate amenities includes much less developer risk in comparison to fixed roof accommodation, when demand is very much tilted toward the warm weather months. Access to land for this form of accommodation is much easier considering the abundance of natural landscape sites throughout Kawartha Lakes. This leisure travel niche may be looked at similar to boaters utilizing the Trent Severn Waterway. Additionally, RV culture is expanding in all parts of North America as the mature demographic sells their valuable family homes and move into condominiums in the large urban centers. The re-investment in a mobile option provides freedom to travel anywhere in North America. This market is projected to grow even further as the baby boomer segment retires.

Bed and Breakfasts (B&Bs)

B&Bs represent an area of opportunity for Kawartha Lakes. A B&B is a small lodging offering overnight accommodation and breakfast. The hosts typically live in the house and provide a high level of catering and personalized service.

Despite the alignment of B&Bs and Kawartha Lakes' visitor profiles, there is a limited supply of B&Bs in Kawartha Lakes. B&Bs continue to gain popularity within the short haul touring segment, particularly with the mature market seeking a combination of heritage accommodation matched with personal attention. These properties are particularly suited to the Mature Outgoing Couples visitor profile.

The current availability of a true B&B experience in a heritage or unique residence located in a small community or natural setting, offering friendly service coupled with a high-quality breakfast is limited. This lodging requires a commitment to operate one's home as a B&B by an outgoing individual, typically of mature age, who is less dependent on the income than the numerous enjoyable relationships created throughout the year.

The City can have a significant impact on encouraging expanded B&B offerings. Homeowners within both the Towns and outlying areas typically require by-law and licensing support to convert their home or outer building to a guest house. The investment requirement, even for a small scaled B&B, is a factor for 'heritage motif' accommodations to attract the traveller. The City can also support the repurposing of these buildings with heritage programs and incentives.

Establishing a significant number of Bed and Breakfast options can help define Kawartha Lakes' brand with its target visitor groups, particularly those interested in the City's emerging culinary and arts and culture offerings.

Cottage and home rentals

According to market analysts Airdna, rentals through Airbnb and VRBO peaked with 513 active rentals July through August 2019. The average rental size was 3.6 bedrooms and the units accommodated 9.3 guests on average. Occupancy rates ranged from a low of 21% in February 2019 to a high of 81% in August.¹⁴ Kawartha Lakes City Council has recognized the role of these rental platforms to support overnight visits to the area and have determined that the City will not restrict these operations. Currently the Kawartha Lakes Tourism does not have any formal programs or supports designed specifically for cottage and home rental operators.

Meetings and Conferences

Many destinations include meetings and conference facilities in their tourism product offering. Meeting and conferences are a high potential option for increasing both the tourism visitation and average spend in the destination with the development of a meetings facility that would be of the scale to attract Ontario-based associations. A conference center in Kawartha Lakes would attract corporate meetings, including board and staff breakaways from the GTA.

A conference centre in Kawartha Lakes would face stiff competition however from existing facilities, located in Haliburton, Muskoka and Orillia that have been in existence over a number of decades and have established a corporate and association customer base. Furthermore, Trent University in nearby Peterborough has significant meeting space for conferences in the summer. Another key factor is that most Ontario-based associations seek warm weather May-September conference scheduling as opposed to Kawartha Lakes' off-peak periods.

While the notion of the Municipality investing in a stand-alone purpose-built facility may not be financially viable, there may be potential for a private sector developer to establish a small-medium scale resort with appropriately sized space for small to medium meetings. The most viable option would involve the expansion of the existing Eganridge Resort to include meeting facilities.

¹⁴ [AirDNA.co Vacation Rental Data](#)

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Dominated by cottage rentals • Lack of upscale accommodation • Seasonal demand limits fixed roof accommodation supply • Growing supply of RV parks • Provincial park camping at capacity in peak season
Activities	<ul style="list-style-type: none"> • Fixed room accommodation supporting business travel, sports teams and social family events
Seasonality	<ul style="list-style-type: none"> • Heavy summer demand • Sufficient cottage capacity in off-season to build four season activity
Visitor Profile	<ul style="list-style-type: none"> • All visitor profiles
Potential	<ul style="list-style-type: none"> • Opportunity to expand B&B offering • Limited potential for resort development (fishing?)

Arts, Heritage and Culture

The arts, heritage and culture tourism assets are particularly poised to benefit from the clustering of experiences as outlined earlier in this report. They have strong appeal to four of the key visitor profiles; Knowledge Seekers, Family Memory Builders, Up and Coming Explorers and Outgoing Mature Couples.

Currently most cultural events are scheduled in the summer season however there is significant potential for additional off-season cultural events, especially those bundled with local food, agri-tourism and related programming. Cultural and heritage organizations should be encouraged to participate in or host events in the downtowns to build critical mass. Additional wayfinding is required to connect the culture and heritage assets with each other and with the downtowns.

Item	Notes
Infrastructure	<ul style="list-style-type: none"> • Arts and Heritage Trail • Farmfest • New Amphitheatre potential • Limited cultural & heritage activities in the downtowns
Activities	<ul style="list-style-type: none"> • Independent travelers
Seasonality	<ul style="list-style-type: none"> • Events currently clustered in summer season

	<ul style="list-style-type: none"> Potential for greater attractor events off peak
Visitor Profile	<ul style="list-style-type: none"> Knowledge seekers Family memory builders Up and coming explorers Outgoing mature couples
Potential	<ul style="list-style-type: none"> High

Opportunity Summary

Based on the above evaluation, the areas with the greatest opportunity are clustered tourism offerings, cycling, land-based trails and ATVs. Those opportunities assessed as having medium potential include canoeing/kayaking, angling, boating and B&Bs. Snowmobiling is assessed as medium to low potential and the resort potential was identified as limited.

Opportunities	Sector	Potential
	Clustered Tourism Offering	High
	Cycling	High
	Land Based Trails	High
	ATVs and Snowmobiling	ATVs High Snowmobiling medium to low
	Canoeing/ Kayaking	Medium
	Angling	Medium
	Boating	Medium
	Accommodation	B&B Medium Resort Limited

9. SWOT Analysis

The purpose of a SWOT Analysis included in a Destination Development Plan process is to attain broad-based agreement from key decision-makers and stakeholders on the specific elements that determine growth opportunities moving forward.

Key to understanding the way forward on producing a plan that will affect positive change to the tourism spending and long-term sustainability is the identification of the

current attributes supporting visitation from key source markets. Conversely, the identification of a destination’s weakness relative to its current tourism assets is a necessary component in establishing a base level for future improvement.

The function of a SWOT is to identify the elements, in both the current and future state, which require action over a mid to long-term period to increase destination tourism spending. In the case of Kawartha Lakes, a SWOT is required to define both the volume of tourism activity required, as well as providing context to the balancing of seasonal tourism growth to achieve a more robust overall product. Clearly, there potentially is a threat to future visitation if the two peak summer months take on the image of an overcrowded and, somewhat, undesirable destination. Furthermore, the longer-term potential and opportunity associated with the other three seasons should be a focus of destination development.

The following identification of each element of the SWOT is derived from a combination of extensive stakeholder feedback over a three-month timeframe, coupled with an extensive tourism asset analysis over a similar period. This analysis considers the following:

- Strengths:** Major internal strengths of Kawartha Lakes’ tourism product offering.
- Weaknesses:** Major internal weaknesses of Kawartha Lakes’ tourism product offering.
- Opportunities:** Major external factors that will affect Kawartha Lakes’ tourism product offering in a positive way.
- Threats:** Major external factors that will affect Kawartha Lakes’ tourism product offering in a negative way.

One of the key building blocks in the Kawartha Lakes Destination Development process is the identification of the elements describing the destination’s Strengths and Weaknesses coupled with the impact that is defined within the Opportunities and Threats.

Kawartha Lakes has an array of tourism product strengths, particularly its natural beauty, outdoor amenities and proximity to Canada’s largest metropolitan center. The strong arts and heritage sector offer a cluster of cultural amenities, available throughout its towns and rural natural settings. The collection of tourism assets available throughout this large municipal area provide a robust touring experience.

The vast majority of Kawartha Lakes' tourist activity and spending occurs in the summer season. The warm weather draw for visitors from the large urban center is a positive for local business while, at the same time, creating a busy tourism season with traffic and waterway overcrowding. The lack of resorts, or appropriate hotel product, outside of Lindsay limits the ability to attract additional tourism spending. Much summer demand is housed in cottage rentals which appears to correspond with a weakening effect on the overall tourism spend.

The current Main Street experience tourism product requires upgrading. There is also demand for greater food and beverage selection especially up-scale dining options which could be served by innovative young chefs escaping the high cost of start-up in the GTA.

There are a number of external factors which could support the growth of tourism in Kawartha Lakes. Improved road access from the GTA with the extension of Hwy 418 to Hwy 35/115 makes it easier for travelers to access Kawartha Lakes. The growth of the younger demographic and New Canadian travellers escaping the large urban centers in Southern Ontario bodes well for future travel activity to the destination with a host of outdoor activities throughout all seasons. The growing popularity of cycling, hiking and culinary travel all support potential tourism growth for Kawartha Lakes. There is also potential to promote overnight getaway travel from the GTA during the three non-summer seasons where the beauty of the destination can be enjoyed with less traffic.

The most significant threat to the Kawartha Lakes tourism product is environmental. Climate change has resulting in warming winters which decrease the opportunity to provide snow and ice related activities and make the winter season less predictable. Additionally, the beauty of Kawartha Lakes coupled with a less hectic lifestyle is currently and will continue to attract a greater number of retirees relocating to the area who will occupy the cottage rental supply and reduce visitor inventory options. In the short term, the projected construction required to refurbish the downtown cores of Lindsay and Fenelon Falls will impact the visitor enjoyment, although the improvements to the Main Street product will improve offering in the longer term.

A thorough list of Kawartha Lakes’ strengths, weaknesses, opportunities and threats is included in the table below.

Strengths	Weaknesses
<ol style="list-style-type: none"> 1. Iconic waterway: Trent-Severn Waterway 2. Diverse Natural Outdoor features 3. Self-guided trails 4. Arts/ Creative Economy 5. Proximity to GTA population 6. Provincial Park camp, hike, canoe 7. Variety of hiking trails 8. Recognized cultural cluster 9. Boat launch access 10. Fishing (summer and winter) 11. Cottage rental inventory 12. Emerging arts reputation 13. Newly established Healthy Environment Plan 	<ol style="list-style-type: none"> 1. Shortage of non-summer assets fueling visitor draw 2. Lack of concentration of tourism assets (dispersed) 3. Upscale, trendy accommodation (matching needs of GTA market) 4. Lack of quality accommodation for upscale travel segment 5. Lack of a year-round attraction 6. Brand recognition: City of Kawartha Lakes 7. Towns’ Main Street visitor appeal 8. Limited food and beverage options 9. Off- season events 10. Beach access 11. Inconsistent non-summer hours of tourism businesses 12. Reputation: summer boating – overcrowding 13. Accommodation – no resorts

Opportunities	Threats
<ol style="list-style-type: none"> 1. Hwy 418 extension to Hwy 35/115 2. Emerging younger demographic relocation 3. Sharing Economy: awareness / growth of overnight visitors 4. Growing popularity of cycling tourism 5. Growing GTA population (especially the emerging new Canadians market) 6. Growing popularity of touring trails 7. Growing popularity of tourist experiences 	<ol style="list-style-type: none"> 1. Climate change: eroding winter snow/ice activities 2. Impact of Main Street revitalization closures: retail, FandB, galleries 3. Conventional vacation patterns (lower demand outside of summer months) 4. Competition 5. Transition from cottage accommodation to four season housing could further limit supply of accommodation 6. Provincial Parks funding, marketing subject to changes in provincial government 7. Locks management/ operation/ funding subject to changes in federal government budgets 8. Competition from established vacation destinations with large budgets and sophisticated product development and marketing plans

10. Strategic Priorities

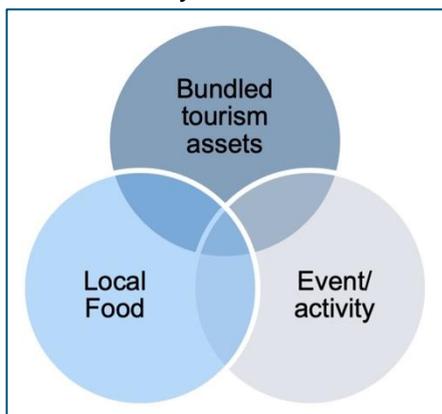
Strategic Priorities are those items which must be addressed to ensure Kawartha Lakes thrives as a tourism destination with increased visitor spend and greater off-season tourist activity. The strategic priorities for Kawartha Lakes' Destination Development Plan are as follows:

- **Asset development** – building the breadth and depth of tourism assets to encourage greater duration and spend of targeted visitor segments.
- **Sustainability** – making environmental and economic sustainability cornerstones of Kawartha Lakes' tourism sector.
- **Tourism Development Capacity** – providing the human and financial resources to drive Kawartha Lakes' Destination Development Plan.

Asset development

Clustering the tourism assets is critical to establishing a compelling value proposition for visitors to Kawartha Lakes. Independently Kawartha Lakes’ assets do not have the draw nor the duration required to act as a true attractor. The combination of tourism assets, local food and an event or activity establishes a compelling product offering that cannot be replicated in another destination. It also encourages visitors to stay longer, encouraging overnight stays which contribute to a greater visitor spend.

Clustering tourism offerings in the spring, fall and winter can also offset the water-based activities only available in the summer months thus extending the tourist season.



Sustainability

Kawartha Lakes’ tourism offering is grounded by its pristine waters, beautiful vistas and natural environment. This finite resource must be preserved, protected and restored for future residents and visitors. This philosophy resonates with Kawartha Lakes’ key visitor segments and creates an even greater connection between the visitor and the destination. Tourism operators and stakeholders must be active partners in developing a sustainable tourism offering.

Seasonal overcrowding issues could be addressed in part by encouraging visitors to explore areas with less traffic, spreading the economic potential more broadly throughout Kawartha Lakes. By expanding product offerings in the fall, winter and spring, the destination development plan can contribute to year-round business sustainability and the overall economic impact of the tourism sector.

Tourism Development Capacity

Developing a destination is a long-term commitment with long-term rewards. This effort requires dedicated staff and financial resources. Kawartha Lakes currently has one staff person responsible for product development and tourism marketing. Kawartha Lakes will require additional resources to effectively implement the Destination Development

Plan as outlined. Separating the marketing and product development functions would allow a dedicated staff member to begin the time-consuming work of engaging with tourism operators and other stakeholders to expand and enhance Kawartha Lakes' tourism assets.

The Destination Development Plan serves as a tool which guides the process of enhancing both the overall product offering within Kawartha Lakes, and in supporting the destination's profile and brand presence within the Southern Ontario tourism target market.

The role of developing Kawartha Lakes tourism brand requires investment in marketing communications provided by an outside marketing agency, or a staff person within the Economic Development department dedicated to the tourism marketing. The primary mandate of the marketing activity would include a comprehensive digital marketing program, ensuring that appropriate tourism partners, (including external sites such as the RTO or Destination Ontario) are provided with updated content and, to support local tourism operators with the ongoing requirements of developing and promoting their businesses.

Another key factor in developing a greater marketing presence on behalf of Kawartha Lakes tourism is the tourism brand management on a daily basis; one which is imperative in ensuring that a consistent message and appropriate tactics are communicated to the target market in Southern Ontario and neighbouring jurisdictions. The requirement to promote Kawartha Lake's non-summer seasons should be a primary focus for the marketing role and the communications strategy in order to address the significant issue of off-season tourism revenue generation.

11. Goals and Objectives

Kawartha Lakes’ tourism product offering is a collection of the assets and experiences that visitors experience in the destination. The destination development should be focused in four areas: active outdoor experiences, culinary, culture (include art, music and heritage) and accommodation.

Tourism Product Offerings

			
Active Outdoor Experiences	Culinary	Kawartha Lakes’ Culture	Accommodation
boating, paddling, hiking, cycling, camping, angling, etc.)	Local food, food markets, food and beverage establishments	art, music, heritage, festivals and events, agri-tourism and community connections	rental cottages/homes, B&B, fixed roof, resort

Goals

Goals are the desired results the destination wants to achieve while objectives are the strategic actions the destination must take to attain the identified goals. The overriding **goals** of the Destination Development Plan are to:

- **Increase visitor spend**
- **Increase tourism activity outside the summer season**

The following objectives are the culmination of the efforts documented above in this document. The key findings of the environmental scan, visitor profile, and patterns, asset analysis, stakeholder consultation all resulted in the identified strategic priorities. These five strategic objectives are detailed in the section below. There are 57 specific actions recommended to achieve these five strategic objectives.

Strategic Objectives	
	1. Establish Kawartha Lakes as a leader in outdoor experiences
	2. Build culinary, local culture and accommodation infrastructure
	3. Bundle Kawartha Lakes' offerings to expand draw and duration
	4. Become a leader in sustainable tourism practices
	5. Allocate the resources to implement the Destination Development Plan

12. Strategic Actions

Strategic Objective	
	1. Establish Kawartha Lakes as a leader in outdoor experiences

Kawartha Lakes offers an abundance of outdoor visitor experiences, particularly in the highly active segment which, generally, targets a younger demographic located within the urban target markets. Additionally, camping and boating outdoor activities will continue to define the Kawartha Lakes destination within Southern Ontario.

Activities such as cycling, hiking, and overnight camping continue to gain popularity with visitors of all ages from the metropolitan centres. There are a number of opportunities to leverage the popularity of cycling to attract additional participation in Kawartha Lakes, some of which focus on extending the season into the quieter and more adventurous winter months.

Kawartha Lakes' hiking trails must compete with trails throughout Ontario. Maintenance and improvements to the trail network will be important to ensure Kawartha Lakes can match the quality of competing destination. There are a number of options for elevating the experience and profile of the destination by developing hiking product at all exertion levels. Hiking appeals to a broad range of the population and can be clustered with other experiences to extend the visitor's length of stay. Outdoor experiences are the

root of the tourism product in Kawartha Lakes and efforts to enhance these experiences will further define Kawartha Lakes as a premier destination for outdoor activities.

Strategic Objective	
	<p>1. Establish Kawartha Lakes as a leader in outdoor experiences</p>
<p>Policy Alignment</p>	<p>City of Kawartha Lakes Economic Development Strategy</p> <ul style="list-style-type: none"> • Goal 1: Adopt a City-wide focus <ul style="list-style-type: none"> ○ Leverage City wide resources with local implementation • Goal 2: Grow specific business sectors <ul style="list-style-type: none"> ○ Develop a guided tourism sector (e.g. two wheels, snowmobiles, cross country skiing, waterways) ○ Expand visitation into the shoulder season and winter

Boating	
<p>Action 1.1</p>	<p>Build itineraries to direct visitors to less visited locks the three locks (Lindsay, Kirkfield, Rosedale)</p>
<p>Description</p>	<p>The Bobcaygeon and Fenelon Falls locks are expected to continue to attract a high volume of boaters. Kawartha Lakes can develop itineraries that include the Kirkfield, Rosedale and Lindsay locks to encourage greater visitation to these sites. There will also be opportunities to focus on activities that would benefit from lower volumes such as interpretive experiences or those focused on the natural environment and limited commercial activity.</p> <p>The Lindsay lock should be a feature of an itinerary for boaters seeking a combination of a lower volume lock and access to the amenities of Lindsay commercial district.</p>
<p>Anticipated Outcomes</p>	<p>Developing itineraries which include these three locks will provide another alternative for visitors to Kawartha Lakes, particularly those looking for a quieter destination. These itineraries will support dispersed visitor patterns and greater tourism activity at low volume destinations.</p>

Action 1.2	Support improvements at the Fenelon Falls, Rosedale and Kirkfield Locks to meet Fenelon Falls, Bobcaygeon locks' amenities
Description	Additional investment in these three locks will create a gentle redirection to boaters to the less crowded locks. Providing additional tourist focused amenities includes a modest investment in supporting amenities such as the adjacent parks and trails.
Anticipated Outcomes	The redirection strategy for summer boaters should help address any perceptions of overcrowding in the summer. This action is expected to encourage additional visitation in Lindsay, Kirkfield and Rosedale while relieving traffic congestion in Bobcaygeon and Fenelon Falls. Recognizing that summer overcrowding is typically associated with vehicular traffic.

	Cycling
Action 1.3	Explore opportunities for fat bike experiences for winter months
Description	Fat bikes are modified mountain bikes designed for snow, sand or uneven terrain. These bikes would open up additional experiences for a younger demographic outside the peak summer months. This activity would require a private sector business to supply the fat bike rentals, preferably in two or three locations in Kawartha Lakes and targeted promotional support.
Anticipated Outcomes	This initiative would require a new business offering from an existing Kawartha Lakes business, preferably in multiple locations. It would have the potential to raise the profile of Kawartha Lakes as a destination for active winter experiences, particularly with the millennial and NextGen visitors from the GTA.
Action 1.4	Develop supporting conventional and digital wayfinding
Description	Supporting an active outdoor travel destination image requires a modification to current wayfinding. Current wayfinding directing highway traffic to specific attractions and towns should be augmented with less expensive and more flexible digital tools such as Strava, Map my Ride and Google maps.
Anticipated Outcomes	An updated wayfinding program will supply Kawartha Lakes' image as a leading-edge outdoor destination which offers an infrastructure of both conventional signage and digital tools, elevating awareness of cycling routes and supporting the growth of this sector.

Action 1.5	Establish Kawartha Lakes as a select destination for trail cycling
Description	Kawartha Lakes has strong cycling infrastructure. The approximately 90 km Victoria Rail Trail provides an assortment of surfaces from hard pack to gravel that accommodates all levels of cyclists. The Trans Canada Trail running east/west through the southern region in addition to a 22km route from Lindsay to Fenelon Falls positions the municipality as a preferred destination for trail rides
Anticipated Outcomes	Providing adequate funding to maintain this asset is necessary to ensure Kawartha Lakes will continue to be recognized as a desirable cycling destination on par with other highly valued trails such as those in Collingwood/ Georgian Bay and Eastern Ontario regions.

Hiking	
Action 1.6	Ensure funding for on-going trail maintenance
Description	Kawartha Lakes' hiking product is the assortment of defined natural trails suitable for a minimum one-hour hike. The City need to protect these assets upkeep and maintenance of the municipal trails and advocate for maintenance of the others. The required investment is a factor of seasonality trends; clearly the most beneficial hiking visitor is one that utilizes trails in the non-summer period.
Anticipated Outcomes	Providing the maintenance of this important asset is necessary to ensure the consistency and quality of the trail, support continued visitor growth and protect Kawartha Lakes' position as a popular destination for hiking.
Action 1.7	Include opportunities for natural interpretation in the trail network trails, incorporate historical, cultural and arts landmarks into Kawartha Lakes' trails
Description	Adding interpretive elements to the current trail inventory is a logical component of Kawartha Lakes' hiking trail experience. The development of a broader based arts and heritage hiking program is an extension of the current branded tours providing physical activity and interpretive elements.
Anticipated Outcomes	Combining hiking trails with the unique culture and heritage of Kawartha Lakes will elevate the City's' offering and encourage visitors

	to experience the natural outdoor and cultural tourism assets together providing a more comprehensive offering.
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Strategic Objective	
	2. Build tourism culinary, local culture and accommodation infrastructure

Conventional tourist infrastructure such as restaurants, retail services and accommodation are essential to ensuring tourism contributes to the local economy. Kawartha Lakes has an established food tourism strategy that provides a framework for incorporating local food into the overall tourism offering.

There are a variety of culinary offerings in Kawartha Lake that can be used to profile local food production and agri-businesses. Cultural assets and events help to differentiate Kawartha Lakes from other communities with similar outdoor amenities while the downtowns provide a destination for shopping, dining and entertainment.

Kawartha Lakes' accommodation is a mix of private rentals, fixed roof accommodation. The City can provide a leadership role in working with existing accommodation providers to engage their visitors and expand their duration and spend during their visit. Hosts for private cottage and home rentals and visiting friends and relatives (VFR) in particular, can become important influencers in welcoming visitors to the area and guiding their activities.

Strategic Actions	
	2 Build culinary, local culture and accommodation infrastructure
Policy Alignment	<p>City of Kawartha Lakes Economic Development Strategy</p> <ul style="list-style-type: none"> • Goal 2: Grow specific business sectors <ul style="list-style-type: none"> ○ Increase the volume of year-round accommodations of all kinds, in all markets Develop operator experiences to boost tourism traffic (cross-sector and cross promotion) ○ Increase the number and capacity of arts, culture and heritage for profit and not-for-profit businesses (expansion and attraction) ○ Foster the development of cultural events and festivals (partnering with tourism)

	<ul style="list-style-type: none"> ○ Develop the arts, heritage, culture brand of Kawartha Lakes so that it becomes an attraction for tourists, new residents and entrepreneurs working in the sector ○ Grow the craft/ maker segment (number of small or micro businesses and sales per business due to increased tourism traffic) ○ Action the Heritage and Cultural Implementation plans ○ Support the innovation and diversification of local agriculture to increase farm revenues ○ Grow agri-culinary participation among producers and connect the results to tourism ○ Increase businesses, increase employment, Increase tourist visits ○ Increase the number and capacity of arts, culture and heritage for profit and not-for-profit businesses (expansion and attraction) <p>Growing Food Tourism in Kawartha Lakes</p> <ul style="list-style-type: none"> ● Opportunity 1: Taste of Place <ul style="list-style-type: none"> ○ 1.1 Develop unique taste of place experiences as demand drivers for the region ○ 1.2 Grow awareness of and celebrate Kawartha Lakes' foodways through ancillary products and experiences ● Opportunity 2: Capacity Building <ul style="list-style-type: none"> ○ 2.1 Increase market readiness of businesses in the food tourism value chain ● Opportunity 3: Enhancing Existing Products <ul style="list-style-type: none"> ○ 3.1 Strengthen regional agriculture programs and agri-tourism events ○ 3.2 Use existing festivals, events and experiences to showcase regional foodways <p>Kawartha Lakes Strategic Community Improvement Plan Objectives</p> <ul style="list-style-type: none"> ● Heritage districts and building restoration and improvements ● Downtown mainstreet revitalization and enhancements <p>Downtown Revitalization Strategic Action Plans</p>
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	<ul style="list-style-type: none"> • Improve the physical environment, visual appearance and functionality of the public realm, maintain and enhance the historic character, • Support and enhance a robust business community • Grow an animated ecofriendly pedestrian town linking natural assets and businesses • Support, promote and develop new and existing cultural assets and recreational assets • Enhance and build upon the positive relationship with the Trent Severn Waterway • Develop and implement a signage plan that supports the community businesses, recreation and tourism <p>Cultural Master Plan</p> <ul style="list-style-type: none"> • Priority One: Build cultural sector capacity • Priority Two: Address local factors inhibiting cultural sector growth • Priority Three: Improve cultural spaces and places • Priority Four: Expand cultural sector funding options • Priority Five: Develop cultural products based on authentic local culture • Priority Six: Collaborate and build partnerships
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Culinary	
Action 2.1	Connect restaurants with local food providers
Description	Kawartha Lakes has an important role in fostering collaboration across the food tourism value chain between local grower/farmers and local restaurants. These collaborations will inform visitors on the quality of the culinary product as well as local food culture. The municipality may play a role in establishing local forums or workshops to connect businesses associated with food production and customer delivery.
Anticipated Outcomes	The collaboration of local restaurants and producers will ensure a better understanding of each other's requirements while providing made in Kawartha Lakes offerings not available anywhere else. The personal connections will also increase awareness of the benefits of a collaborative culinary approach to growing their individual businesses.

Action 2.2	Implement the Growing Food Tourism Strategy
Description	The 2018 Growing Food Tourism Strategy is the foundation for culinary tourism in the Kawartha Lakes. The strategy recommends leveraging Kawartha Lakes’ rural culture and identity. This can be accomplished through industry collaboration in developing local food experiences, supported by the promotion of the practice of story-telling among the local operators and residents.
Anticipated Outcomes	Implementation of the Growing Food Strategy is expected to elevate the local food and drink offerings and establish Kawartha Lakes as a desirable destination with unique food and drink offerings.
Action 2.3	Support local food producers to expand visitor experiences, increasing tourism activity and revenue
Description	Kawartha Lakes can provide supports to farms and other local producers, including breweries and cideries to develop visitor-facing activities or services. Businesses such as Kawartha Dairy and the local breweries have the greatest potential to lead this initiative.
Anticipated Outcomes	Kawartha Lakes has an opportunity to develop brand recognition associated with a culinary destination, whereby the food production sector is visitor-focused in providing a food experience beyond its historic production role.
Action 2.4	Tell the story of local food producers
Description	Storytelling is a key component of destination marketing. Storytelling differs from traditional advertising or digital messaging in that it depends on sharing relevant stories about individuals or businesses that are unique. Kawartha Lakes can lead this effort and begin to develop a story-telling culture among local food producers, developing and sharing their unique history and principles.
Anticipated Outcomes	A conscious effort to develop food producers’ stories will become an important element in the tourism offering. Over time Kawartha Lakes will accumulate an inventory of these stories which will add to the visitors’ experience and help to differentiate Kawartha Lakes from other destinations.

Action 2.5	Connect restaurants with heritage organizations – encourage use of heritage references in menu offerings
Description	Kawartha Lakes can encourage local restaurants and bars to connect with heritage organizations, local history and incorporate the local history and culture into their offerings. Kawartha Lakes can foster these connections in product development workshops that include restaurant operators and chefs with heritage and cultural groups and experts. .
Anticipated Outcomes	Including heritage references within menus will enhance the image and customer interest level of a standard restaurant in Kawartha Lakes. It will also encourage a level of creativity in menus that may previously have been missing.
Action 2.6	Create a brewery itinerary and map
Description	There are three craft breweries in Kawartha Lakes in Lindsay, Bobcaygeon and Fenelon Falls with the potential for additional in the future. This small cluster provide the nucleus of a beer themed itinerary including local foods and noteworthy tourism assets along the way. A themed map should also include nearby food options including restaurants or unique snack options.
Anticipated Outcomes	A craft beer themed itinerary and map will facilitate beverage touring as an active local experience and promote both the craft brewery and associated culinary businesses. This popular activity can be expected to result in an increase in visits by a millennial visitor demographic, which may not have previously recognized the Kawartha Lakes as an option.

	Events
Action 2.7	Support the development of cultural events in natural environment, with artisans and local food
Description	Kawartha Lakes can leverage two complimentary assets in creative ways to attract visitors. Cultural events provide a forum to connect the cultural activity with local food and related retail offerings. The combination of cultural elements and natural setting provides the ingredients for events with the potential to grow in visitors and profile over the years.
Anticipated Outcomes	Successful cultural events set in nature will reinforce Kawartha lakes' image as a premier destination for outdoor experiences. Such a cultural event supported, initially, by municipal seed funding has the potential to evolve into a recognized 'Signature Event' within the province.
Action 2.8	Support the establishment of a juried art show themed around Kawartha Lakes' natural assets
Description	A juried art show such as an "Art in the Woods" event, an extension of the common Art in the Park concept, could combine the City's growing art and artisan community and the natural setting. This event could incorporate a structure competition for artists and artisans who would also display and sell their work. The event would be scheduled over a weekend with fall colours as a backdrop. This could be led by the City in its inaugural year and sponsored by local media.
Anticipated Outcomes	Any first-time event within the community should be evaluated in terms of event attendance with separate measure for locals and visitors, social media pre/post impact/response, local sponsorship support, and participation within the arts community. The evaluation should include quantitative and qualitative measures of the number of exhibitors, exhibitors' sales and overall impression.

	Downtown Main Streets
Action 2.9	Provide public spaces for events
Description	<p>Communities in Ontario typically stage festival and event programming in or near the downtown core or Main Street. Developing gathering places within the vicinity of the core facilitates access to retail, food and beverage amenities supporting most events.</p> <p>The Towns of Lindsay, Bobcaygeon and Fenelon Falls all have Main Streets with robust amenities within the food and beverage, retail, including art installation storefronts. Event programming intended to draw visitors to Kawartha Lakes, require a dedicated area within walking distance of the commercial district. This location may serve as a parking lot throughout the year which is transformed to event space when required. A natural park setting adjacent to the Main Street is, another option to supports an event organizer’s requirements. Public spaces for events can be accessed through a rental fee process and do not need to be made available to public event organizers at no charge.</p>
Anticipated Outcomes	<p>Providing public space for tourism events in the downtowns will create additional tourist activity for the restaurants, services and stores in the immediate surrounding. Access to a year-round outdoor space with power connections will enable the facilitation of events. The designation of specific spaces will support event planners with consistent options that supports pedestrian traffic access to supporting services.</p>
Action 2.10	Incorporate public art, street furniture, streetscaping in the downtowns, recognizing the character of individual communities
Description	<p>The planned refurbishment of Kawartha Lakes’ three Towns over the near future is an opportunity to add character to its Main Streets. Municipalities now recognize streetscaping as an important component to attracting visitors and increasing sales in the downtowns. The City should engage businesses in Lindsay, Bobcaygeon Omemee and Fenelon Falls to sponsor further streetscaping elements such as street furniture and signage to enhance the City’s streetscaping work.</p>

	<p>Rotating public art installations by local artisans would further animate the Main Streets beyond the previously budgeted enhancements.</p>
<p>Anticipated Outcomes</p>	<p>The four predominant towns in Kawartha Lakes establish a five-year plan for an independent character themed streetscape that distinguishes each of them from many of Ontario’s small-mid-size communities. Kawartha Lakes utilizes its Main Streets to promote its artisan culture by investing in and designating a storefront as a rotating showcase for its local arts community. The downtowns can differentiate themselves, reflecting their history and culture through themed streetscapes.</p>
<p>Action 2.11</p>	<p>Consider establishing design guidelines in the Community Improvement Plan</p>
<p>Description</p>	<p>The 2018 Kawartha Lakes CIP document outlines opportunities for municipal investment and support in the areas of both downtown revitalization and derelict buildings and improvements. These initiatives will elevate the image and visitor appeal of the four largest Towns. There may be an option for further managing the overall appeal by developing a specific design motif that reflects the individual character of each downtown.</p>
<p>Anticipated Outcomes</p>	<p>Downtown design guidelines would provide individual themes for Kawartha Lakes’ towns, establishing an identifiable look for each community’s Main Street.</p> <p>Kawartha Lakes provides independent design guidelines for its towns which establishes an identifiable look for each community’s Main Street. The transformation will support community culture, differentiate the various downtowns and create a platform for Kawartha Lakes’ tourism product offering ultimately attract additional visitors to the downtown and creating greater opportunity for retail service, and food and business operations.</p>
<p>Action 2.12</p>	<p>Utilize the CIP to support second story accommodation rental spaces</p>
<p>Description</p>	<p>Kawartha Lakes does not have sufficient hotel occupancy demand in the fall to spring period to support additional fixed roof accommodation above that already planned. There is, however, the potential to convert</p>

	<p>private homes to B&B accommodation that would not require year-round occupancy to support the operators' business model.</p> <p>The City may need to relax existing zoning restrictions to facilitate short-term accommodation uses in the downtowns. The City would also need to include this new accommodation in all directories of tourist accommodation.</p>
Anticipated Outcomes	<p>Permitting second story accommodation in the downtowns would provide additional revenue to local businesses and landlords in the downtown cores, increase tourist traffic in the downtowns, provide additional options for peak travel times and provide additional year - round accommodation to support Kawartha Lakes' goal of expanding off-season tourism.</p>
Action 2.13	Target downtown businesses for tourism networking, workshops, bundling activities
Description	<p>The current Main Street business owners and operators in Kawartha Lakes are not necessarily conversant with tourism networking and promotion. In many cases, the retailers benefit from the summer surge of visitor activity, but typically serve the year-round local customer. The City should strive to educate local businesses of the economic impact of tourism in Kawartha Lakes, the value of the visitor spend and opportunities to partner with others to bundle their tourism offerings.</p> <p>The City should initiate workshops periodically throughout the year to inform the commercial partners of the value of the visitor spend, and the opportunity in partnering with others to bundle offerings.</p>
Anticipated Outcomes	<p>More engagement by main street businesses would result in more visitor-friendly experiences. It would also encourage greater collaboration between downtown businesses, the City and other tourism operators.</p>

	Accommodations
Action 2.14	Create itineraries for VFR and Airbnb hosts

Description	Kawartha Lakes should prepare various itineraries for VFR and cottage rental hosts to share with their guests. These itineraries can be themed around various visitor interests such as arts and culture, culinary, heritage or active outdoor activities. The suggested itineraries should be updated regularly to reflect the change in potential activities by season.
Anticipated Outcomes	The suggested itineraries will help inform hosts on the various tourism activities in Kawartha Lakes and help inform visitors to Kawartha Lakes of the wide variety of amenities and activities they can participate in and ultimately support greater visitor duration and spend during their stay.
Action 2.15	Establish a database of Airbnb/VRBO owners to share municipal information tourism marketing and event calendar information
Description	A database of all of Kawartha Lakes' tourism partners including emails, social media and street addresses is the first step in ensuring all members of the tourism industry are engaged and informed of Kawartha Lakes' tourism activity. It will be important to include private cottage and home rental operators such as those using rental platforms Airbnb and VRBO.
Anticipated Outcomes	Establishing a mutually supportive relationship between the largest accommodation sector and the municipality will benefit both parties. The regular communication will assist hosts to gain a valuable perspective on serving their guests.

	Wayfinding
Action 2.16	Consider the development of a municipal wayfinding strategy
Description	Kawartha Lakes' wayfinding infrastructure should make it easy for visitors to find the City's key tourism assets. A wayfinding strategy would identify key assets and provide orientation cues along well-structured paths.
Anticipated Outcomes	The development of a wayfinding program would profile Kawartha Lakes' outdoor tourism assets. It would assist create awareness of the City's key tourism assets and make them easy to find.

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Strategic Objective	
	3. Bundle Kawartha Lakes' offerings to expand draw and duration

A significant factor driving the growth of tourism in any destination is related to the degree by which the tourism brand is recognized by the target market; and that the awareness is translated to a greater volume of visitors experiencing the destination. Clearly, 'draw' is a function of brand strength developed by a selection of travel experiences that consistently satisfy those who visit the destination. Continuing to improve the core asset groups that define Kawartha Lakes such as Active Outdoor, Art and Culture, and the Main Street amenities within the Towns of Omemee, Lindsay, Bobcaygeon, and Fenelon Falls.

The length of visitor stay is the other factor driving tourism spend, recognizing that the primary goal of the destination is to provide a travel experience that encourages the overnight visit. The activities related to entertainment, culinary, arts and culture, coupled with role of the Main Street in a visitor's experience, all support a longer stay duration creating increased visitor spending.

By combining tourism assets, Kawartha Lakes can elevate the tourism offering from separate elements to a comprehensive experience that will differentiate the tourism offering and can generate higher returns. The City has an important role in educating tourism stakeholders, encouraging collaboration with similar and complementary tourism operators and experimentation to develop bundled offerings that appeal to visitors.

Strategic Actions	
	3 Bundle Kawartha Lakes' offerings to expand draw and duration
Policy Alignment	<p>City of Kawartha Lakes Economic Development Strategy</p> <ul style="list-style-type: none"> • Goal 1: Adopt a City-wide focus <ul style="list-style-type: none"> ○ Leverage City wide resources with local implementation • Goal 2: Grow specific business sectors <ul style="list-style-type: none"> ○ Agriculture and Food: Increase businesses, increase employment, Increase tourist visits. Grow agri-culinary participation among producers and connect the results to tourism

	<ul style="list-style-type: none"> ○ Tourism: Increase the volume of year-round accommodations of all kinds, in all markets. Develop operator experiences to boost tourism traffic (cross-sector and cross promotion). Develop a guided touring sector (e.g., two wheels, snowmobiles, cross-country skiing, waterways). Expand visitation into the shoulder-season and winter and connect these off-peak activities to culture. Identify and support unique or differentiated retail that either generates tourism visits or extends those visits on a community-by-community basis. ○ Culture: Develop the arts, heritage, culture brand of Kawartha Lakes so that it becomes an attraction for tourists, new residents and entrepreneurs working in the sector. Grow the craft/ maker segment (number of small or micro businesses and sales per business due to increased tourism traffic) ● Goal 3: Encourage a positive community business culture <ul style="list-style-type: none"> ○ Peer to peer networks: Work with leaders in each cluster to develop networks and an annual summit focused on building the cluster through new ideas, private investment and informing the City’s annual cluster work plan (2018) ○ Create a peer-to-peer business ambassador program in each cluster to attract and connect with new business owners and promote the City ○ Local community business organizations: Continue to develop relationships and programming with local business organizations (e.g. business development workshops, integrating support networks) to advance the area as a place for business (ongoing) ○ Support community-based business organizations in local economic development activities (ongoing) <p>Cultural Master Plan</p> <ul style="list-style-type: none"> ● Priority Six: Collaborate and build partnerships
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	Bundled tourism assets
Action 3.1	Expand branded tour development
Description	<p>Branded tours connect tourism assets and encourage visitors to explore beyond one community and season. There are currently four branded tour in Kawartha Lakes: the Kawartha Art and Heritage Tour, Butter Tart Tour, Legends and Lore Walking tour and the newly established Trent-Severn Trail Towns. Tours provide a route for visitors to travel and combine various tourism assets in a compelling way, while engaging local businesses and operations to extend their offering to appeal to new or expanded markets.</p> <p>Kawartha Lakes' vast number of tourist assets provides a multitude of additional opportunities to build tours based on geography (e.g. rural destinations), themes (e.g. group of Seven destinations), best fall colour sites) and supporting efforts of local tourism operators on developing tourism packages.</p> <p>Additional tours based on geography, themes and season will expand the draw and duration of visits.</p>
Anticipated Outcomes	<p>Expanding the offering of branded tours will help increased awareness of local tourism assets and related businesses. It will provide greater access to information on tourism assets. The development of additional branded tours should encourage greater engagement of the operators of local tourism assets and related businesses. The increased number of branded tours should ultimately result in greater draw and duration of visits to Kawartha Lakes.</p>
Action 3.2	Host package workshops for tourism stakeholders incorporating three components (food, event and tourist activity)
Description	<p>The City of Kawartha Lakes has an important role in educating and supporting efforts of local tourism operators on developing tourism packages. Kawartha Lakes can provide workshops that connect local tourism stakeholders with the tools, knowledge and local network they need to combine activities, food and other tourism assets in themed programs.</p> <p>Bundling tourism activities provide an opportunity to create a more authentic and differentiated tourism offering. Combining any tourism</p>

	activity with food encourages greater spend and duration. Providing workshops for tourism stakeholders such as restaurants, tourism related businesses and other assets leverages the experience and knowledge of the local operators and greatly increases Kawartha Lakes' capacity to create meaningful compelling tourist experiences.
Anticipated Outcomes	Themed packages will increase Kawartha Lakes' appeal to a variety of visitor profiles with specific interests. Package development will encourage tourism stakeholders to collaborate. The workshops will increase the knowledge, and revenue generating potential for tourism operators and tourism related businesses. The workshops will also result in differentiated tourism product offering for inclusion in the tourism marketing efforts.
Action 3.3	Host tourism event workshops for event organizers
Description	Making the distinction between community and tourist events is a common area of misunderstanding between community organizers and Destination Marketing Organizations. The City of Kawartha Lakes can educate event organizers on making the distinction between community events and those with tourism potential. These workshops would include educating participants on the components required to appeal to and attract visitors. They would encourage organizers to work together to establish and achieve their event objectives and provide workbooks and tools to incorporate tourist focused principles in their event planning. They will also provide organizers with the knowledge and tools to measure tourist participation and economic impact.
Anticipated Outcomes	These workshops and related workbooks will provide a platform for informed discussion on tourism related events and ultimately increase the number of tourism focused events. The workshops will encourage greater collaboration between event organizers and the City staff while providing tourism staff with greater data on tourist attendance and economic impact.
Action 3.4	Identify experiential tourism opportunities and host experiential tourism workshops for potential experience providers
Description	Experiential tourism is an immersive form of tourism which focuses on experiencing a community by actively engaging and participating with its history, people, culture, food and environment. Unlike tours, experiential tourism includes hands on participation such as preparing

	<p>food, making a craft, experiencing a historic site the way that previous inhabitants would, sampling and learning about various beers, or a snowshoeing adventure including lessons, woodland tour and outdoor picnic.</p> <p>Kawartha Lakes should continue to work with local operators to develop experiences, particularly those experiences that can extend the tourism season and encourage off-season activity.</p>
<p>Anticipated Outcomes</p>	<p>The creation of unique tourist experiences in Kawartha Lakes will serve to differentiate the community compared to other destinations. The workshops will create greater capacity for local operators to develop experiences.</p> <p>Experiential tourism is recognized for its potential as a high-yield activity to generate additional revenue for existing tourism operators and related businesses.</p> <p>The creation of experiential tourism offerings will also provide greater off-season tourism offerings.</p>

Strategic Objective	
	4. Become a leader in sustainable tourism practices

Sustainable tourism considers the future economic, social and environmental impact of the industry. Kawartha Lakes is extremely rich in natural assets and has a stewardship responsibility on behalf of its citizens and tourism operators. It has a responsibility to protect the natural environment for resident and visitor enjoyment with a sustainable approach to all of its strategies and actions. There are many elements in the practice of sustainable tourism where the City can provide leadership in establishing and applying a sustainability principles and actions including transportation, festivals, waterways or campground assets.

Visitors' demands for sustainable practices are growing and sustainable tourism will be a common element in all product development and messaging in the near future.

Education and communication are key components of a sustainable tourism development. Websites or social channels will set the tone and the ultimate brand essence of the destination. Sustainable practices begin with the Economic Development office's actions and communication and extend to the tourism businesses and related organization operating throughout the destinations.

In addition to the obvious benefits of protecting finite resources for future residents and visitors, sustainable tourism development shows tourists that the community cares. It can result in lower costs for energy and other resources and contribute to the overall positive image of businesses adopting sustainable practices.

Strategic Actions	
	4 Become a leader in sustainable tourism practices
Policy Alignment	<p>Kawartha Lakes Healthy Environment Plan</p> <ul style="list-style-type: none"> • Ensure land-use policies and planning encourage the development of compact neighbourhoods that integrate residential, office, and retail developments and promote transit and active transportation • Enhance the protection of natural assets and ecosystems, while expanding the City's natural capital and building climate resilience in the environment

	<ul style="list-style-type: none"> • Develop and implement a community-wide tree management and resilience program to increase tree canopy and protect existing canopy from climate and weather-related risks • Support and encourage the uptake of electric and low-emission vehicles • Encourage residents and visitors to use transit, walk, bicycle and carpool
Action 4.1	Establish a regenerative / sustainable tourism mandate and standards
Description	Residents and visitors are increasingly demanding tourism that meets the United Nations World Tourism Organization definition of sustainable tourism which is; “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”.
Anticipated Outcomes	Adopting sustainable tourism practices will support the Kawartha Lakes Healthy Environment Plan. Incorporating these principles in the tourism delivery in Kawartha Lakes will ensure that tourism contributes to the quality of life for residents and that the natural elements are preserved for current and future visitors. It will also maintain Kawartha Lakes’ appeal to the growing number of tourists demanding sustainable practices.
Action 4.2	Lead by example. Adopt green principles in the tourism department
Description	Kawartha Lakes can help to educate tourism stakeholders on green or sustainable tourism practices by incorporating them into the everyday operation of the tourism department and further communicating these practices to visitors and tourism stakeholders.
Anticipated Outcomes	Adoption of green and sustainable tourism principles by local operators and tourism stakeholders will support the Kawartha Lakes Healthy Environment Plan and establish Kawartha Lakes as a sustainable tourism destination. Programs such as the Green Marine and Blue Flag environmental certification programs assist in reducing the environmental footprint of water-based tourism. Educating local operators and tourism stakeholders will also reduce the impact of tourism on the community.

Action 4.3	Advise tourism partners, operators, event organizers and related businesses on how to adopt green principles
Description	The City of Kawartha Lakes should take the lead in educating tourism stakeholders on practices that reduce the environmental impact of their operations. They can also encourage stakeholders to work together to support the adoption of sustainable practices throughout the City and highlight those businesses that have successfully adopted these principles through a variety of communications tools and methods including workshops, stakeholder communications and toolkits.
Anticipated Outcomes	These efforts will result in the adoption of green and sustainable tourism principles by local operators and tourism stakeholders. Together tourism stakeholders can reduce the impact of tourism on the community and help to preserve local environment for future residents and visitors. Their efforts will establish Kawartha Lakes as a sustainable tourism destination.
Action 4.4	Advise visitors on how to have a green trip
Description	Kawartha Lakes' marketing plan should include communication about Kawartha Lakes' sustainable tourism practices and the visitors' role in supporting these objectives.
Anticipated Outcomes	These efforts will reinforce the visitors' role in supporting sustainable tourism principles and establish Kawartha Lakes' positioning as a sustainable tourism destination.
Action 4.5	Provide electric vehicle charging stations
Description	There are currently a handful of electric vehicles charging stations in Kawartha Lakes. The City should work with businesses to establish public charging stations in Bobcaygeon and Fenelon Falls at a minimum (there are charging stations in Lindsay and Norland)
Anticipated Outcomes	Kawartha Lakes can address growing demand for electric vehicle charging stations, particularly those visitors from larger population centres such as the GTA and Ottawa markets.
Action 4.6	Explore sharing options to address visitor transportation demand in the summer months

Description	Municipalities across Ontario are exploring and establishing transportation programs to address visitor and resident transportation needs. These programs can include expanding the bike sharing facilities in Bobcaygeon and Fenelon Falls to other Trent Severn Waterway communities, transit on demand programs and agreements with ride sharing companies such as Uber or shuttle services.
Anticipated Outcomes	A transportation system for visitors to Kawartha Lakes has the potential to increase visitor traffic to less populated areas, relieve congestion in high traffic areas such as Bobcaygeon and Fenelon Falls. It also has the potential to distribute visitor spending throughout the City while supporting its Healthy environment objectives.
Action 4.7	Expand bike sharing opportunities in Kirkfield, Lindsay and Rosedale
Description	The bike sharing programs at the Bobcaygeon and Fenelon Falls locks provides bicycles to individuals on a short-term basis. The program was enthusiastically embraced by visitors. Expanding the program to the Kirkfield, Lindsay and Rosedale locks would build on the success of this program.
Anticipated Outcomes	Additional bike sharing opportunities will support the Healthy Environment Strategy. These additional facilities will also result in increased activities for visitors at the locks with lower tourism activity. It will build critical mass of activities, provide transportation options for visitors without vehicles including boaters, reduce congestion and provide transportation flexibility for visitors. The availability of bikes on an as needed basis will allow people who may not otherwise use bicycles to do so.
Action 4.8	Support the development of the Active Transportation Strategy
Description	The City of Kawartha Lakes is currently undertaking an Active Transportation strategy to address walking, biking and other active mobility options for residents and visitors. Tourism and the economic impact of tourists is an important consideration in an active transportation plan. This is particularly true for Kawartha Lakes and its hiking and cycling offerings.
Anticipated Outcomes	The Active Transportation Strategy will provide strategies to maintain the existing hiking trails, identify opportunities to expand hiking routes and improve the connections between existing trails. The plan is also expected to support the continued expansion of cycling infrastructure

	including shoulder widening and possibly cycling lanes on municipal roadways.
Action 4.9	Work with seasonal businesses on development of off-season programs and product offerings to support sustainable businesses
Description	Destinations have increasingly recognized the opportunity to generate tourism activity beyond the peak summer season. Economic development and tourism staff can encourage seasonal businesses to participate in the package development and experiential tourism initiatives. These businesses can also be included in the expanded branded tours and itineraries.
Anticipated Outcomes	Efforts to engage seasonal businesses to expand their offerings outside the peak season has the potential to generate additional tourist activity, revenue and employment in Kawartha Lakes while adding to the sustainability of the entire tourism sector.
Action 4.10	Develop itineraries that drive visitors to low traffic areas within Kawartha Lakes
Description	<p>Itineraries that include some tourism assets identified as having high potential but currently have lower traffic should be included in the expanded number of itineraries. These itineraries can include hidden gems such as the smallest jail, restaurants worth searching for, local food stands and scenic cycling routes.</p> <p>These itineraries should encourage visitors at some of the busier towns along the Trent-Severn Waterway to the natural settings and less visited areas in the north and western sectors including towns like Kinmount and Rosedale.</p>
Anticipated Outcomes	Increased tourism activity in remote areas will help to spread the economic impact throughout Kawartha Lakes. There is an opportunity to promote Kawartha Lakes' more remote roadways and cycling routes as an advantage for cyclists.

Strategic Objective	
	5. Allocate the necessary resources to implement the Destination Development Plan

Developing Kawartha Lakes’ tourism assets and expanding and enhancing the visitor experiences as laid out in the Destination Development Plan requires dedicated human resources to successfully affect change.

This plan identifies the need for both internal and external resources within the municipal structure to:

- Focus on the development of Kawartha Lake’s tourism product
- Provide a role in Economic Development to effectively market the tourism brand, and provide support for the tourism stakeholder business operators

An entry level staff role is needed in support of the existing senior municipal tourism role with the myriad of marketing tasks required. The marketing role could be filled by a recent graduate of a Tourism Diploma Program out of the Community College environment or a local marketing firm.

The marketing role would be a conduit to the community tourism businesses. This individual would be responsible for implementing marketing programs through social media, regional partner opportunities, and the various promotional opportunities presented to the department.

Kawartha Lakes’ Tourism Roles

Destination Development	Destination Marketing	Tourism Development Plan
<ul style="list-style-type: none"> • Senior Role • Product Development • Industry Engagement • Education, collaboration, consultation with stakeholders • Collaboration with regional and provincial tourism organization 	<ul style="list-style-type: none"> • Junior Role • Design and implement marketing programs • Social media and web marketing tactics • Create tourism ads • Support tourism stakeholders marketing efforts 	<ul style="list-style-type: none"> • Combined effort • Development and promotion of key tourism assets and experiences

Strategic Objectives	
	<p>5 Allocate the resources required to implement the Destination Development Plan</p>
<p>Policy Alignment</p>	<p>Economic Development Strategy</p> <ul style="list-style-type: none"> • Goal 1: Adopt a City-Wide Focus <ul style="list-style-type: none"> ○ Refocus economic development programs around the five clusters focusing on entrants, growers, mentors and cluster growth ○ Integrate programs (existing and new) around each cluster (network building, shared promotion, business skills training, youth business training, capacity building, skills identification and attraction) • Goal 3: Encourage a positive community business culture <ul style="list-style-type: none"> ○ Develop peer to peer networks <ul style="list-style-type: none"> ▪ Annual cluster summit and workplan ▪ Peer to peer business ambassador program ○ Support local community business organizations <ul style="list-style-type: none"> ▪ Develop relationships and programming with local business organizations ▪ Support community-based business organizations in local economic development activities • Leverage city wide resources with local implementation <p>Cultural Master Plan</p> <ul style="list-style-type: none"> • Priority One: Build cultural sector capacity • Priority Six: Collaborate and build partnerships

	Stakeholder Engagement
Action 5.1	Consult with the economic development cluster and tourism stakeholders on the potential for new experiences
Description	Tourism operators and other stakeholders will play a dominant role in developing new tourism product in Kawartha Lakes. These individuals will have significant insights into the potential for new experiences. The tourism staff will need to consult with them regularly through economic development cluster meetings and regular individual meetings focused on continuing to explore existing tourism offerings and opportunities to address evolving visitor needs and interests.
Anticipated Outcomes	The consultation process with the local tourism, food and beverage and events stakeholders will provide solid input and insight to the future development of travel experiences within Kawartha Lakes.
Action 5.2	Consult with the economic development cluster on branding the current outdoor active product with an off-season focus
Description	<p>This strategy is intended to reposition Kawartha Lakes as a four-season destination. The City should work with the economic development cluster and tourism stakeholders to identify the assets and experiences that best represent the City in future marketing programs. One segment with real potential in all four seasons is the active outdoor segment.</p> <p>The City can encourage existing tourism stakeholders to develop competitions or active outdoor events that are scheduled in the fall or winter periods.</p>
Anticipated Outcomes	Consultation with key industry stakeholders will help to build consensus on the key experiences by season to represent Kawartha Lakes. The consultation will encourage other tourism-related operators to collaborate on tourism offerings.
Action 5.3	Work with existing operators and event organizers to identify potential extensions to existing summer experiences

Description	<p>In many cases trails, branded tours and summer festivals can provide the inspiration for fall and winter tourism asset and experience development. Existing operators and event organizers should be encouraged to develop off-season offerings leveraging the success of summer activities and experiences. They may also identify examples of successful programs and offerings in other jurisdictions to help generate ideas for new offerings in Kawartha Lakes.</p>
Anticipated Outcomes	<p>Increased programming offered at off-peak times is expected to increase visitor traffic and related spending year-round. It is also expected to result in a gradual increase in the number of tourism related businesses remaining open outside of the summer season.</p>
Action 5.4	Encourage event organizers to create post Labour Day and winter tourist events
Description	<p>Kawartha Lakes can encourage organizers to host events after Labour Day by helping minimize the risk of holding these events. Support for these events could include easing specific bylaws (e.g., parking restrictions, hours of operation, etc.), volunteer recruitment and financial support (see Action 5.7). The events would also require significant media support, especially targeting visitors outside of Kawartha Lakes.</p> <p>The period through to Thanksgiving weekend is a robust travel period with less traffic congestion and fall colours. Connecting this season with culinary events and farmers' markets could support a getaway for urban residents.</p> <p>Another potential event would be combining Kawartha Lake's art and heritage assets with its farm-table culinary offering. Municipal support could include both assistance in planning the event and a modest financial seed contribution in the inaugural year.</p> <p>A winter snow-based event could use one of Kawartha Lakes' iconic trails as a conduit or backdrop.</p>
Anticipated Outcomes	<p>The expectations for an off-season event in Kawartha Lakes should be modest in the early years. Collaboration of local operators and event organizers would be a sign of a successful event. Over time the event should be expected to attract a large number of visitors from the GTA.</p>

Action 5.5	Develop a research bank to share best practices for tourism stakeholders
Description	Kawartha Lakes can assist local tourism related businesses by educating them on best practices in other jurisdictions. This best practice material can be used to assist event organizers with event planning and promotion. The City can play a leadership role in the best ideas and methods to develop a successful event and promote it to a broader target group. This information can be shared via an online database, tourism development workshops and during consultation with existing tourism stakeholders.
Anticipated Outcomes	With the establishment of a bank of best-practices, Kawartha Lakes can provide valuable materials that help elevate the product offerings in the City. They will help build the capacity and knowledge of the existing tourism sector and reinforce the City as a valuable resource for tourism stakeholders.

	Funding
Action 5.6	Explore opportunities to access RTO and provincial funding to support product development
Description	The Celebrate Ontario grants process is a structure that provides seed funding for tourism product development. Specifically, within this funding process, the Cultural Development Fund supports local cultural associations in developing events that have potential to attract event participants beyond the local level. The value of the Cultural Development Fund lies in its mandate to improve local organizations skill set in developing and growing tourism-ready events.
Anticipated Outcomes	The opportunity to continuously develop and/or update local tourism assets such as cultural, heritage or entertainment events through a seed fund serves to jumpstart the development of events, particularly those contemplated for the non-peak seasons.

Action 5.7	Host grant writing workshops for event organizers and other tourism stakeholders
Description	Kawartha Lakes should assist event organizers and other tourism operators to access funding to establish new programs and expand existing events from organizations such as Celebrate Ontario and the Regional Tourism Organization.
Anticipated Outcomes	Providing workshops to support grant writing will help increase the number of successful applications resulting in increased number of events and higher funding application approval rates. The increase in funding for local events will also increase the capacity of local stakeholders to successfully apply for funds and provide the needed resources to stage these events.

	Human and Financial Resources
Action 5.8	Establish separate roles for tourism marketing and product development
Description	<p>The skills and experience required for the tourism product development and marketing roles are distinct and complementary.</p> <p>Kawartha Lakes needs a tourism professional responsible for the tourism offering and for implementation of the Destination Development Plan while advising and consulting with tourism stakeholders and regional and provincial tourism organizations. This individual will maintain data on all local businesses and work in concert with these businesses so that they have the resources and supports they need to effectively manage their tourism business.</p> <p>A more junior or entry-level position is required to establish out-bound messaging to the identified target sectors using a combination of conventional and digital media. This individual will have proficiency in social media content and messaging.</p>
Anticipated Outcomes	The establishment of the tourism marketing role would ensure Kawartha Lakes has the capacity and the expertise to develop and then promote Kawartha Lakes tourism experiences in an effective and productive manner.

13. Next Steps

This document provides the detailed account of the actions and analysis in Phase One and Two of the development of this plan from the initial literature review through to the crafting of the final Destination Development Plan. The implementation plan included in the appendix of this report provides a recommended timeline and priority level for the 57 recommended actions.

The success of this Destination Development Plan is dependent on the plan’s implementation. Tourism stakeholders are critical to this implementation. Regular engagement, through workshops, individual meetings and ongoing discussion, will be essential to achieve stakeholder buy-in and participation in the evolution of Kawartha Lakes’ tourism offerings.

Once the work has begun on the actual tourism product, City staff can begin to develop the marketing plan based on the visitor profiles and product offerings outlined in this report. Performance measurement, based on the anticipated outcomes outlined above, will ensure that staff can track progress towards the plan objectives and provide the necessary data to revise and refine the plan as needed.

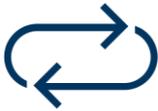
Phase one

			
Literature Review	Visitor Profiles	Stakeholder Engagement	Asset Identification & Analysis

Phase two

			
Best Practice Review	SWOT analysis	Strategic Priorities	Destination Development Plan

Implementation

			
<p>Tourism Operator Support and Engagement</p>	<p>Marketing Plan</p>	<p>Performance Measurement</p>	<p>Revise and Refine Offering</p>

14. Appendix

Select Survey Results

Top Activities

Festivals and local events	32
Water based (swimming, kayaking, canoeing, etc.)	26
Retail shopping	25
Trent-Severn Waterway boating	24
Culinary experiences	16
Exploring neighbouring communities	14
Fishing	12
Cultural/heritage attractions	11
Natural attraction sightseeing (e.g. fall colours)	9
Agri-tourism experiences	6
ATVing	5
Community/regional sports participation	4
Cycling	4
Hiking and trails	2
Snowmobiling	2
Cross Country Skiing and Snowshoeing	1
Other	7

Q4: What is the biggest challenge/ threat to the local tourism economy?

Lack of transit services	2
Parking	3
Dock slips	6
Public restrooms	7
Lack of tourism driving signature festivals & events	13
Lack of activities in Fall/Winter/Spring	24
Other	14

What is your impression of the quality of the tourism assets compared to other destinations?

	Superior	High	Moderate	Low
Natural assets and hiking trails	12	27	15	3
Outdoor activities	11	29	16	1
Parks and Campgrounds	7	27	20	4
Heritage	5	15	30	8
Arts and Culture	4	17	31	6
Festivals and events	3	21	26	8
Food and beverage	3	23	25	7
Agri-tourism	2	17	24	13
Experiential tourism activities	2	9	30	17
Retail	2	21	28	7
Roofed accommodation	2	9	25	21
Themed trails and auto routes	0	10	28	20

Q7: When you think about the tourism assets and experiences in Kawartha Lakes, what would you like to save or protect?

Waterways	24
Parks/ nature	13
Downtown	9
Trails	6
Events	5
Accommodation	4
Heritage	3

Q8: When you think about tourism assets and experiences in Kawartha Lakes, what you like to change or remove?

Events	11
Waterway	6
Trails	6
Off-season	5
Restrooms	4
Branding/ Promotion	4
Accommodation	3
Traffic	3
Parking	2
Signage	2
Shoulder Season	2

Q:9 How could we increase tourism in the spring, fall and winter seasons?

Events	24
Winter activities	12
Food/restaurants	9
Accommodation	6
Funding/incentives	5
Marketing	5
Packages	4
Arts & Culture	3
Collaboration	2
Family activities	2

a. Detailed Visitor Profile

The Statistics Canada Survey of Residents and International Travel Survey provides a comprehensive profile of Canadian visitors to Kawartha Lakes. Data on visitors originating outside of Canada is not available. The survey data provides a summary of the trip purpose, length of stay, visitor origin accommodation type, the type of activities visitors participated in and visitor demographics.

According to Statistics Canada, Kawartha Lakes Census Division 16 had 1,649,535 total person visits in 2016. The majority (60 percent) of all person visits were overnight visits and 40 percent were same day visits. The main purpose of the trip was equally divided with 49 percent indicating that they were visiting friends and relatives (VFR) and 48 percent indicating their main purpose was for pleasure.

Census Division 16: Kawartha Lakes
Total Person visits (1,649,535)

Length of Stay, 2016

Overnight	989,357	60%
Same day	660,178	40%

Main purpose of Trip

Pleasure	791,740	48%
VFR	812,383	49%
All other	1,649,535	3%

Origin of Trip

Ontario	1,642,366	99%
Rest of Canada	3,913,836	1%

Almost all Canadian visitors, a full 99 percent of visitors or 1,642,366 person visits, were from Ontario. A breakdown of the remaining one percent indicates that 2,588 of the 1.6 million person visits were from British Columbia followed closely by 2,462 from the Maritimes and another 1,232 from Manitoba.

The largest number of visitors occurred between July and September with 810,838 person visits, followed by 405,596 visits in April through June and 237,011 visits from January through March. There were just 196,093 visits in October through December of 2016.

The following tables consider the origin of the visitors using a variety of geographical regions. Using the Regional Tourism Organization (RTO) regions, the majority of

persons visits originated from RTO6 which includes York, Durham and the Hills of Headwater with 57 percent of all visits, followed by RTO7 (Bruce Peninsula, South Georgian Bay and Lake Simcoe with 15 percent and the Greater Toronto Area with 13 percent of all person visits.

Origin of Trip, Ontario Regions (Person Visits) by RTO	#	%
Region 12: Muskoka, Parry Sound and Algonquin Park	-	
Region 13b: North Central Ontario	-	
Region 13c: North West Ontario	795	0%
Region 13a: North East Ontario	1,894	0%
Region 13: Northern Ontario	2,689	0%
Region 10: Ottawa and Countryside	6,594	0%
Region 9: South Eastern Ontario	10,721	1%
Region 2: Niagara Falls Canada	11,968	1%
Region 11: Haliburton Highlands to the Ottawa Valley	15,370	1%
Region 1: Southwest Ontario	25,095	2%
Region 4: Huron, Perth, Waterloo, Wellington	30,778	2%
Region 8: Kawartha and Northumberland	36,746	2%
Region 3: Hamilton, Halton, Brant	104,059	6%
Region 5: Greater Toronto Area	217,432	13%
Region 7: Bruce Peninsula, Southern Georgian Bay and Lake Simcoe	244,337	15%
Region 6: York, Durham, Hills of Headwaters	936,578	57%

When comparing visitors using Census Metropolitan Area (CMA) regions, a full 62 percent came from the Toronto CMA and 21 percent from the Oshawa CMA, the Hamilton and Barrie CMAs each represented six percent of all person visits to Kawartha Lakes.

Origin of Trip, Ontario Regions by CMA	(Person Visits)	%
CMA543: Brantford	2,730	0%
CMA541: Kitchener	5,269	0%
CMA505: Ottawa-Hull	5,704	0%
CMA555: London	6,466	0%
CMA521: Kingston	6,646	0%
CMA539: St. Catharines-Niagara	8,501	1%
CMA550: Guelph	19,099	1%
CMA529: Peterborough	35,874	2%
CMA568: Barrie	87,586	6%
CMA537: Hamilton	88,214	6%
CMA532: Oshawa	314,301	21%
CMA535: Toronto	940,253	62%

The following table shows the top origins of visitors by Census Division (CD). The largest share, 38 percent, were from Durham Region. Another 19 percent were from York Region followed by 13 percent from Simcoe County. The Toronto Metropolitan Municipality represented eight percent of total person visits with six percent from Halton Region and five percent from Peel Region.

Origin of Trip, Ontario Regions by Census Division	Person Visits	%
CD46: Haliburton County	9,280	1%
CD42: Grey County	9,381	1%
CD28: Haldimand-Norfolk Regional Municipality	10,449	1%
CD26: Niagara Regional Municipality	11,968	1%
CD41: Bruce County	16,254	1%
CD23: Wellington County	19,839	1%
CD15: Peterborough County	35,874	2%
CD21: Peel Regional Municipality	88,899	5%
CD24: Halton Regional Municipality	96,174	6%
CD20: Toronto Metropolitan Municipality	138,796	8%
CD43: Simcoe County	218,702	13%
CD19: York Regional Municipality	303,989	19%
CD18: Durham Regional Municipality	617,134	38%

b. Accommodation Type

As shown below, 78 percent of all overnight visitors stayed in private homes and cottages, followed by 15 percent who stayed in camping or RV facilities. Just six percent stayed in traditional roofed accommodations. Of the visitors who stayed in private home and cottages, a larger share (58 percent) stayed in private cottages compared to 42 percent who stayed in private homes. This distinction may have implications on the number of accommodations available for off-season visitors as many cottages may not be winterized.

Accommodation Type	(Person Visits)
Roofed commercial	58,212
Camping/RV facilities	144,061
Private homes/cottages	774,130
Other accommodation type	13,434

As previously indicated, some 40 percent of visitors (660,178 person visits) did not stay in Kawartha Lakes overnight. For those that stayed overnight, the largest number stayed for two nights representing 32 percent or 520,528 person visits followed by 203,503 visits or 13 percent who stayed one night and 147,249 or 9 percent who stayed 3 nights. Just 2 percent of all person visits were one or more weeks (6 to 9 or 10 plus nights).

Number of Nights (person visits)

Number of nights	Person visits	%
0	660,178	40%
1	208,503	13%
2	520,528	32%
3	147,249	9%
4	72,265	4%
5	10,417	1%
6 to 9	12,447	1%
10+	17,948	1%
Total	1,649,535	100%

Outdoor and sports activities dominated the primary activities with 53 percent indicating outdoor sports and activities was the primary activity for the visit, followed by 39 percent who reported visiting friends or relatives was the primary activity.

Activities Participated	Person Visits	%
Zoos/Aquariums/Botanical Gardens	1,604	0%
Cultural Performances	2,196	0%
Theme Parks	2,722	0%
Shopping	4,002	0%
Museums/Art Galleries	4,764	0%
Historic Sites	6,309	0%
Festivals/Fairs	13,648	1%
National/Provincial Nature Parks	14,762	1%
Business Meeting/Conference/Seminar	16,942	1%
Restaurant or bar	19,612	1%
Medical/Dental appointment	20,647	1%
Sightseeing	21,912	1%
Visit Friends or Relatives	647,290	39%
Any Outdoor/Sports Activity	863,946	53%

Breaking down the outdoor sports and activities; boating was the dominant outdoor sport or activity representing 372,769 of the person visits followed by camping with 290,468 person visits visiting a beach (226,075 visits), canoeing (213,395 visits), hiking (190,046 visits) and fishing (157,641 visits).

Outdoor/Sports Activities

Activity	Number of Person Visits
Skiing/Snowboarding	4,375
Hunting	4,964
Play a sport	5,199
Cross-country Skiing	9,746
Snowmobiling	24,379
Wildlife/Bird watching	66,329
ATV	78,635
Golfing	84,070
Cycling	84,112
Fishing	157,641
Hiking	190,046
Canoeing	213,395
Visit a beach	226,075
Camping	290,468
Boating	372,769

The top activities excluding outdoor/sports and visiting friends and relatives were sightseeing, medical/ dental appointments, restaurants and bars, business meetings, national or provincial parks and festivals and fairs.

Activities Participated Excluding VFR and Outdoor/Sports (Person Visits)

Activity	Person Visits
Zoos/Aquariums/Botanical Gardens	1,604
Cultural Performances	2,196
Theme Parks	2,722
Shopping	4,002
Museums/Art Galleries	4,764
Historic Sites	6,309
Festivals/Fairs	13,648
National/Provincial Nature Parks	14,762
Business Meeting/Conference/Seminar	16,942
Restaurant or bar	19,612
Medical/Dental appointment	20,647
Sightseeing	21,912

Visitor Demographics

There were more male adult visitors (58 percent of total visitors) compared to 42 percent female adult visitors. One quarter of the visitors travelled with children. The age of adult visitors was fairly equally distributed with 25 percent or 362,826 age 55 to 64 and 22 percent or 362,826 age 25 to 34. There were 17 percent aged 35 to 44 and 16 percent aged 45 to 54.

Age of Adult Visitors

Age	Visits	%
18 - 24	149,182	9%
25 - 34	362,826	22%
35 - 44	284,194	17%
45 - 54	264,832	16%
55 - 64	407,630	25%
65+	180,872	11%

Gender of Adult Visitors (18+) (Person Visits)

Gender	%
Female	42%
Male	58%

The largest share of visitors has some post-secondary education (48 percent) with 26 percent having completed a university degree.

Education	%
< High school	9%
High school	17%
Some post-secondary	48%
University degree	26%

As would be expected, the overnight visitor spending far exceeds the same day visitor spending. Overnight spending of \$80,161,617 in 2016 represented 76 percent of all visitor spending while same day spending of \$25,925,674 accounted for 24 percent of total visitor spending.

The largest share of visitor spending was for food and beverage at \$54.5 million followed by \$26.5 million for transportation. Accommodation accounted for \$16 million in visitor spending followed by \$6.2 million in retail spending and \$2.7 million for recreation and entertainment.

Visitor Spending in Region

Overnight	\$ 80,161,617
Same-Day	\$ 25,925,674

c. Five Year Trends 2012-2016

As noted earlier, this report provides data from 2012 through 2016 but studying the change in visitor patterns can provide some indication on the general direction that could be expected for subsequent years. Visitation, as measured by total person visits, has increased from 1.1 million total person visits to over 1.6 million visits in five short years.

Total Visitor Spending	\$106,087,291
Food & Beverage	54,510,316
Transport	26,572,225
Accommodation	16,021,746
Retail/Other	6,237,290
Recreation/ Entertainment	2,745,713

Total Person Visits (Weighted)

Year	2012	2013	2014	2015	2016
Total Person Visits (Weighted)	1,176,334	1,155,905	1,478,759	1,512,626	1,649,535

The share of overnight visits has also increased over the same time period from 46 percent of visits in 2012 to 60 percent of visits by 2016. The average number of nights of overnight visits on the other hand has decreased slightly from 2.79 average nights in 2012 to 2.43 nights in 2016.

Length of Stay

	2012	2013	2014	2015	2016
Overnight	46%	53%	51%	57%	60%
Same-Day	54%	47%	49%	43%	40%

Average nights of overnight visits

	2012	2013	2014	2015	2016
Average nights of overnight visits	2.79	2.33	2.33	2.4	2.43

The main purpose of the trip has also seen a slight increase in the share of total visits attributed to visiting friends and relatives increasing from 47 percent to 49 percent of all person visits.

Main purpose of Trip

	2012	2013	2014	2015	2016
Pleasure	46%	51%	51%	51%	48%
VFR	47%	42%	42%	43%	49%
All Others	7%	7%	6%	5%	3%

There has been a significant change in the origin of visitors by Census Metropolitan Areas. The Toronto CMA which represented 34 percent of person visits in 2012 grew dramatically to represent 57 percent of all person visits in 2016.

Origin of Trip, Top 5 CMAs

	2012	2013	2014	2015	2016
Peterborough	8%	9%	6%	4%	2%
Barrie	2%	6%	7%	8%	5%
Hamilton	2%	4%	3%	2%	5%
Oshawa	19%	16%	13%	18%	19%
Toronto	34%	44%	49%	48%	57%

There was also a significant change in the accommodation type, with the share of visitors using private homes and cottages jumping from 68 percent of all accommodation in 2012 to 78 percent by 2016.

Accommodation Type

	2012	2013	2014	2015	2016
Roofed commercial	7%	8%	10%	11%	6%
Camping/RV facilities	22%	10%	19%	17%	15%
Private homes/cottages	68%	78%	70%	72%	78%
Other accommodation type	3%	4%	1%	0%	1%

Kawartha Lakes experienced some big swings in the primary outdoor activity with all participation in all activities, except golfing and wildlife/bird watching, growing. The following graphs show the number of person visits by outdoor activities. The growth of the boating and camping sectors are particularly strong with boating growing from 155,688 person visits in 2012 to 372,769 in 2016. Camping also grew from 154,457 person visits to 290,468 by 2016.

Top 6 Outdoor Activities Participated

	2012	2013	2014	2015	2016
Boating	155,688	166,648	236,503	252,248	372,769
Camping	154,457	95,185	169,694	174,236	290,468
Visit a beach	155,446	103,414	113,861	129,959	226,075
Canoeing	40,717	75,181	100,725	169,239	213,395
Hiking	154,099	82,195	76,289	223,750	190,046
Fishing	103,288	177,530	250,538	172,669	157,641

The following graph shows the growth of the top six primary outdoor activities by person visits from 2012 to 2016. All the activities experienced substantial growth. Canoeing saw the most dramatic growth with an increase of 81 percent over the five-year period while boating grew by 58 percent. Camping experienced a 47% increase while fishing,

visiting and beach and hiking saw increases of 34 percent, 31 percent and 19 percent respectively.

% Change in Activities Participated 2012 to 2016

Activity	%
Canoeing	81%
Boating	58%
Camping	47%
Fishing	34%
Visit a beach	31%
Hiking	19%

The profile of the visitor has also changed over the five-year period. The share of visitors that have completed high school has decreased from 32 percent down to 17 percent while the share that has completed some post-secondary education has increased from 38 percent in 2012 to 48 percent by 2016. The share of individuals with a university degree has also increased from 16 percent to 26 percent.

Education Level of Respondents

	2012	2013	2014	2015	2016
< High school	13%	7%	5%	4%	9%
High school	32%	35%	40%	30%	17%
Some post-secondary	38%	35%	25%	35%	48%
University degree	16%	23%	31%	31%	26%

One concerning figure is the average visitor spending in the region. The average same day per person spend increased slightly from \$34 per to \$39 per visit. At the same time the average spend per person per overnight visit has decreased dramatically from \$144 per person to just \$81 per person by 2016.

Total Person Visits and Visitor Spending

	2012	2013	2014	2015	2016
Total Person Visits (Weighted)	1,176,334	1,155,905	1,478,759	1,512,626	1,649,535
Total Visitor Spending	\$99.2	\$89.4	\$99.4	\$109.5	\$106.1

Total visitor spending increased by just 7 percent while the total person visits increased by 26 percent between 2012 and 2016.

Total Person Visits and Visitor Spending (2012 to 2016)

	2012	2013	2014	2015	2016
Transport	24,564,171	26,095,505	29,814,431	27,213,157	26,572,225
Accommodation	15,421,220	15,571,176	15,194,871	21,096,662	16,021,746
Food & Beverage	44,788,290	34,637,910	40,259,724	50,843,420	54,510,316
Recreation/ Entertainment	7,037,273	6,232,060	5,075,920	3,779,774	2,745,713
Retail/Other	7,358,365	6,865,882	9,044,887	6,604,465	6,237,290

Looking a little closer at total visitor spending, food and beverage is the only sector with a significant increase over the five-year period. The Accommodation sector has experienced some swings in spending from a low of \$15.2 million in 2014 to a high of \$21.1 in 2015 before dropping down to \$16 million in 2016. Spending on transportation is up from \$24.6 million to \$26.6 million. At the same time the spending on recreation/entertainment is less than half the level of 2012. Retail spending is also down from a high of \$9 million in 2014 to \$6.2 million in 2016.

The food and beverage spending patterns may also be a reflection of the growth in visits to private homes and cottages. While the spending at restaurants and bars has increased six percent over the five years, there was a sizeable increase of 27 percent in food and beverage spending at stores.

Food and Beverage Spending

	2012	2013	2014	2015	2016
Stores	22,238,636	16,217,614	17,907,944	29,893,065	30,572,010
Restaurants & Bars	22,549,654	18,420,296	22,351,780	20,950,355	23,938,306

Spending on culture and recreation has declined over the five-year period from \$7 million in 2012 to just \$2.7 million in 2016. The spending on recreation declined 29 percent while the spending on culture declined by over 200 percent.

Recreation and Culture Spending

	2012	2013	2014	2015	2016
Recreation	1,194,952	2,728,693	3,673,307	2,428,682	928,294
Culture	5,842,321	3,503,368	1,402,612	1,351,092	1,817,419

d. Detailed Asset Analysis

Asset Category: Branded Touring Trails

Assessment	Draw	Duration	Off Season
Trent Severn Trail Towns	Medium	Medium	Low
Kawartha Arts & Heritage Trail	High	High	Low
Butter Tart Tour	High	High	Medium
Legends and Lore Walking Tour	Medium	Low	Low

Visitor Profiles

Trent Severn Trail Towns: Knowledge, Family Memory Outgoing Mature Couples

Kawartha Arts & Heritage Trail: Knowledge, Up & Coming, Outgoing Mature Couples

Butter Tart Tour: Family Memory, Up & Coming, Outgoing Mature Couples

Legends and Lore Walking Tour: Knowledge, Outgoing Mature Couples

Asset Category: Branded Touring Trails

Assessment	Draw	Duration	Off Season
Kawartha Trans Canada Trail	Medium	Medium	Medium
Victoria Rail Trail	High	Medium	Medium
Somerville Trail	Medium	Medium	Low

Visitor Profile

Kawartha Trans Canada Trail: Knowledge, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers

Victoria Rail Trail: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Somerville Trail: Up & Coming, Sports Lovers, Nature Lovers

Asset Category: Waterway Facilities

Assessment	Draw	Duration	Off Season
1. Locks			
Bobcaygeon Locks	High	High	Low
Fenlon Falls Locks	Medium	Medium	Low
Rosedale Lock/OTENTiks	Medium	Medium	Low
Lindsay Lock	Medium	Medium	Low
Kirkfield Lock	Medium	Medium	Low

Visitor Profile

Bobcaygeon Locks: Knowledge, Family Memory, Outgoing Mature Couples

Fenlon Falls Locks: Knowledge, Family Memory, Outgoing Mature Couples

Rosedale Lock/OTENTiks: Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples

Lindsay Lock: Knowledge, Family Memory, Nature Lovers, Outgoing Mature Couples

Kirkfield Lock: Knowledge, Family Memory, Nature Lovers, Outgoing Mature Couples

Assessment	Draw	Duration	Off Season
2. Beaches			
Blanchard's Road Beach	Medium	Medium	Low
Beach Park	High	Medium	Low
Riverview Beach Park	High	Medium	Low
Centennial Park West	High	Medium	Low
Omeme Beach	Low	Low	Low
Birch Point	Low	Low	Low
Bond Street	High	Medium	Low
Sturgeon Point Beach	Low	Low	Low
Head Lake	High	Medium	Low
Norland Bathing Area	Medium	Low	Low
Valentia Beach (aka Sandbar Beach)	High	Low	Low
Burnt River Beach	Medium	Low	Low
Burnt River Four Mile Lake	Low	Low	Low
Centennial Beach	High	Low	Low
Verulam Recreational Park	High	Low	Low
Boat Launches (multiple launches in 11 communities)	High	Medium	Low

Visitor Profile

Blanchard’s Road Beach: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Beach Park: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Riverview Beach Park: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Centennial Park West: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Omeme Beach: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Birch Point: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Bond Street: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Sturgeon Point Beach: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Head Lake: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Norland Bathing Area: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Valentia Beach (aka Sandbar Beach): Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Burnt River Beach: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Burnt River Four Mile Lake: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Centennial Beach: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Verulam Recreational Park: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Boat Launches (Multiple launches in 11 communities): Family Memory, Up & Coming, Outgoing Mature Couples

Asset Category: Experiences

Assessment	Draw	Duration	Off Season
Canoeing/Kayaking	Medium	Medium	Low
Boating	High	High	Low
Fishing	Medium	Medium	Low

Visitor Profile

Canoeing/Kayaking: Family Memory, Sports Lovers, Nature Lovers

Boating: Family Memory, Sports Lovers, Nature Lovers

Fishing: Family Memory, Sports Lovers, Nature Lovers

Asset Category: Parks/Outdoor

Assessment	Draw	Duration	Off Season
Balsam Lake Provincial Park	High	High	Low
Emily Provincial Park	High	Medium	Low
Indian Point Provincial Park	High	Medium	Low
Canada US Walleye Tournament	High	Low	Medium
Kawartha Lakes Classic Cycling Tour	High	Medium	Low
Queen Elizabeth II Wildlands Provincial Park (Adjacent KL)	High	Low	Low

Visitor Profile

Balsam Lake Provincial Park: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Emily Provincial Park: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Indian Point Provincial Park: Family Memory, Up & Coming, Sports Lovers, Nature Lovers

Canada US Walleye Tournament: Up & Coming, Sports Lovers, Nature Lovers

Kawartha Lakes Classic Cycling Tour: Family Memory, Sports Lovers

Queen Elizabeth II Wildlands Provincial Park (Adjacent to KL): Knowledge, Up & Coming, Sports Lovers, Nature Lovers

Asset Category: Experiences

Assessment	Draw	Duration	Off Season
Hiking	High	High	Low
Cycling	High	Medium	Low
ATVs	Medium	Medium	Low

Visitor Profile

Hiking: Family Memory, Up & Coming, Sports Lovers, Nature Lovers, Outgoing Mature Couples

Cycling: Family Memory, Up & Coming, Sports Lovers

ATVs: Family Memory, Sports Lovers

Snowmobiling: Family Memory, Sports Lovers

Asset Category: Entertainment/Events

Assessment	Draw	Duration	Off Season
Lindsay Exhibition	Medium	Low	Medium
Highland Cinemas	High	Low	Low
Kawartha Farmfest	Medium	Low	Low
Bikefest: Bobcaygeon	High	Medium	Low
Milk Run	High	Low	Low
Santa Day in Fenelon Falls	Medium	Low	Low
Simcoe Day in Fenelon Falls	Medium	Low	Low
Classics on Kent, Lindsay	Medium	Low	Low

Visitor Profile

Lindsay Exhibition: Family Memory, Up & Coming

Highland Cinemas: Knowledge, Family Memory, Up & Coming, Connected Explorers

Kawartha Farmfest: Knowledge, Family Memory, Up & Coming, Connected Explorers, Outgoing Mature Couples

Bikefest: Bobcaygeon: Knowledge, Family Memory, Up & Coming, Outgoing Mature Couples

Milk Run: Family Memory, Up & Coming, Sports Lovers

Santa Day in Fenelon Falls: Family Memory

Simcoe Day in Fenelon Falls: Family Memory, Up & Coming, Outgoing Mature Couples

Classics on Kent, Lindsay: Family Memory, Up & Coming, Outgoing Mature Couples

Asset Category – Main Streets

Assessment	Draw	Duration	Off Season
Lindsay	Medium	Medium	Medium
Bobcaygeon	High	High	Medium
Speciality retail (Bigley's, Kawartha Store)	High	High	Medium
Fenelon Falls	High	Medium	Medium
Omeme	Low	Low	Low

Visitor Profile

Lindsay: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Outgoing Mature Couples

Bobcaygeon: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Outgoing Mature Couples

Speciality retail (Bigley's, Kawartha Store): Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Outgoing Mature Couples

Fenelon Falls: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Outgoing Mature Couples

Omeme: Knowledge, Outgoing Mature Couples

Asset Category – Heritage

Assessment	Draw	Duration	Off Season
Dry Stone Wall	Medium	Medium	Low
Canada's Smallest Jail	Medium	Low	Medium
Olde Gaol Museum	Medium	Low	Medium

Visitor Profile

Dry Stone Wall: Knowledge, Outgoing Mature Couples

Canada's Smallest Jail: Family Memory

Olde Gaol Museum: Knowledge, Family Memory

Asset Category – Arts & Culture

Assessment	Draw	Duration	Off Season
Colborne Street Gallery	Medium	Low	Medium
Jean Watson Studio	Medium	Low	Medium
Clayworks Pottery	Medium	Low	Medium
Kawartha Settlers Village	Medium	Medium	Low
Quaker Oats Farm	High	Medium	Medium
Globus Theatre	High	Medium	Medium
Celebration Event Centre	Medium	Medium	Medium

Academy Theatre	High	Medium	Medium
Kawartha Art Gallery	Medium	Low	Medium
South Pond Farms	High	Medium	Low

Visitor Profile

Colborne Street Gallery: Knowledge, Up & Coming, Connected Explorer, Outgoing Mature Couple

Jean Watson Studio: Knowledge, Up & Coming, Connected Explorer, Outgoing Mature Couple

Clayworks Pottery: Knowledge, Up & Coming, Connected Explorer, Outgoing Mature Couple

Kawartha Settlers Village: Knowledge, Family Memory, Outgoing Mature Couples

Quaker Oats Farms: Family Memory, Up & Coming

Globus Theatre: Knowledge, Up & Coming, Outgoing Mature Couples

Celebration Event Centre: Knowledge, Family Memory, Connected Explorers

Academy Theatre: Knowledge, Up & Coming, Outgoing Mature Couples

Kawartha Art Gallery: Knowledge, Up & Coming, Outgoing Mature Couples

South Pond Farms: Knowledge, Up & Coming, Connected Explorers, Outgoing Mature Couples

Asset Category – Experiences

Assessment	Draw	Duration	Off Season
Yam and Fibre Festival	Medium	Medium	Low
Kawartha Arts Festival	High	Medium	Low
Gallery Tour	High	Medium	Low

Visitor Profile

Yam and Fibre Festival: Knowledge

Kawartha Arts Festival: Knowledge, Up & Coming, Connected Explorers, Outgoing Mature Couples

Gallery Tour: Knowledge, Up & Coming, Connected Explorers, Outgoing Mature Couples

Asset Category – Agri-Tourism/Local Food

Assessment	Draw	Duration	Off Season
1. Farmer’s Market			
Lindsay Saturday	High	Medium	Low
Lindsay Thursday	Medium	Low	Low
Kinmount	High	Low	Low
Bobcaygeon	Medium	Low	Low
Fenelon Falls	Medium	Low	Low

Visitor Profile

Lindsay Saturday: Knowledge, Family Memory, Up & Coming

Lindsay Thursday: Knowledge, Family Memory, Up & Coming

Kinmount: Knowledge, Family Memory, Up & Coming

Bobcaygeon: Knowledge, Family Memory, Up & Coming

Fenelon Falls: Knowledge, Family Memory, Up & Coming

Assessment	Draw	Duration	Off Season
2. Notable Restaurants			
Ziraldo’s Resturant, Fenelon Falls	High	Low	Medium
Donatella Bar & Grill, Bobcaygeon	Medium	Low	Medium
Lindsay’s Aroma	Medium	Low	Medium
Riverside Inn, Norland	High	Medium	Medium
Kawartha Dairy Headquarters	High	Medium	Medium
Olympia Restaurant, Café & Bar, Lindsay	Medium	Low	Medium
Little Schnitzel House, Lindsay	High	Medium	High
Water’s Edge Restaurant, Bobcaygeon	Medium	Low	Low
Mickeals Bakery (Lindsay, Omemee)	High	Low	High
Kawartha Choice Farm Fresh	High	Low	Low

Visitor Profile

Ziraldo’s Resturant, Fenelon Falls: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples

Donatella Bar & Grill, Bobcaygeon: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples

Lindsay's Aroma: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples
Riverside Inn, Norland: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples
Kawartha Dairy Headquarters: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples
Olympia Restaurant, Café & Bar, Lindsay: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples
Little Schnitzel House, Lindsay: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples
Water's Edge Restaurant, Bobcaygeon: Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples
Mickeals Bakery (Lindsay, Omeme): Knowledge, Family Memory, Up & Coming, Sports Lovers, Connected Explorers, Nature Lovers, Outgoing Mature Couples
Kawartha Choice Farm Fresh: Knowledge, Up & Coming, Connected Explorers, Nature Lovers, Outgoing Mature Couples

Asset Category – Accommodation

Assessment	Draw	Duration
Lindsay	M	NA
Days Inn	L	NA
Admiral Inn/Conference Centre	L	NA
Knights Inn	L	NA
Howard Johnsons	L	NA
Kent Inn	L	NA
Ramada	L	NA
Fenelon Falls		
Bobcaygeon Inn	H	NA
Eganridge Resort	H	NA

e. Comparator Community Events

Muskegon, Michigan

Category	Season	Festival/Event/Attraction	Comments
Music, Family	Summer	White Lake Chamber Music	2-day classical music fest
Music, Family	Summer	Rock Stock	4 th of July rock festival
Music, Family	Summer	Irish Music Festival	Sept- culture, music 4 stages Irish market
Music, Family	Summer	Muskegon City Youth Fair	3 days/Experience farm life/ music/theatre
Arts	Summer	Lakeshore Arts Fest.	July-350 arts exhibitors
Arts	Summer	Arts and Drafts Festival	Sept/ combine culture fest and local brewery open house
Arts	Summer	Muskegon Museum Art	
General	Summer	Jesse Jackson African Amer. Museum	
General	Summer	SS Milwaukee Ship Museum	
General	Summer	Rebel Road Motorcycle Fest.	Main St. July charity event att: 1,000+
General	Summer	Seaway Run and Expo	Regional health/fitness
General	Dec-Apr	Snowfest	Main St- food/breweries/comp.
General	Dec-Apr	Winter Beerfest	Feb: Brewers Guild event
General	Fall	Fall Colour Tours (weekly)	
General	Fall	Antique Tractor/Engine	Celebrate farms/ food
General	Fall	Free Fishing Wknd	Licence fees waived wknd

Skaneateles, New York

Category	Season	Festival/Event/Attraction	Comments
Entertainment	Summer	Band Concerts on Lake	Fri eve. all summer
Entertainment	Summer	Skaneateles Music Fest	Chamber music on lake
Entertainment	Summer	Curbstone Festival	Shop, music, events
Entertainment	Summer	Antique Classic Boat Fest.	
Arts	Summer	Antique Fair	Artisan/antique fair
Arts	Summer	Walking gallery tour	
Arts	Winter	Dickens Christmas	Retail fair/Nov Thksg-Xmas
Arts	Winter	Winterfest	Jan24/25 – food/events

Shawinigan, Québec

Category	Season	Festival/Event/Attraction	Comments
Museum	Year Round	Le Cite de l'Energie	Prov'l Attraction year-round
Museum	Year Round	Musee de Jean Chretien	
Outdoor Activities	Summer	Intl. Classic Canoe Race	Since 1934/ river race 30km, prov. attraction
Outdoor Activities	Summer	Defis du Parc Cycle race	Sept/ Can. #1 sport cycle event
Outdoor Activities	Summer	Prov. Dragon Boat Race	
Outdoor Activities	Summer	GPS Car Rally	
Outdoor Activities	Summer	TreeGO	Tree-Top Aerial Adventure/ camping/rock climbing
Outdoor Activities	Summer	Parc de L'il Melville	Natural Forest/ hiking/ Camping O'tents
Outdoor Activities		Tribal Fest	Competitive sports, BMX, paddleboard slacsine etc.
Outdoor Activities	Winter	Defis du Parc Nordic Race	3-day winter x-ski event
Outdoor Activities	Winter	Valle Rocanigan	16km ttl, X-Ctry/snowshoe
Entertainment	Winter	Cirque Eloize	Contemporary circus

Category	Season	Festival/Event/Attraction	Comments
Entertainment	Winter	Dragao Acrobat Fest.	Fantasy acrobat event
Arts	Fall	Ste. Flore Painters Conference	Art show, seminars
Arts	Fall	Book Fair	
Arts	Fall	Painter's Alley	Regional artist downtown streets
Entertainment	Fall	Shawicon	Québec Pop culture, gaming, virtual reality events

f. Emerging Opportunities

Wellness Retreats.

Adapted from [CBI website](#)

Wellness tourism is travel in pursuit of maintaining or enhancing physical or emotional wellbeing. It can include visits to a spa, beauty treatments, massage, yoga, meditation and mindfulness. Wellness travelers are particularly interesting because they are typically higher spending visitors.

Key attractor elements for a wellness traveler are:

- Beach access
- Pools or swimming
- Healthy cuisine
- Access to nature and the scenic outdoors
- Fitness facilities and classes
- Outdoor adventure programming
- Environmentally friendly
- Traditional sports like golf or tennis
- Doing good for the local community
- Hot springs or mineral springs.

Wellness travel pairs well with active travel activities such as hiking and cycling, especially in nature. Cultural and historical excursions are also an interesting addition to a wellness holiday.

Wellness tourists are typically between age 36 and 55. Adventure, environmental and social sustainability and giving back to the local community are significantly more important to younger wellness tourists. Older wellness tourists prefer resorts, while the younger wellness tourists prefer nature and yoga retreats.

Opportunity Review: Film and Video Production

Compiled from [OMDC website](#)

Ontario municipalities are increasingly recognizing the benefits of attracting and supporting film and video production as part of their tourism efforts. Film production can grow the profile of the community while providing an economic boost through food and accommodation expenditures.

Ontario destinations are an attractive option for film production due to the variety of location looks and terrains along with the significant incentives and services available for film production in the province.

Ontario Creates, the agency responsible for attracting and supporting film production in Ontario, reports that there were 324 film and television projects were produced in Ontario in 2018. contributing \$1.9 billion to the economy and created 37,000 full-time direct and spin-off jobs.

Kawartha Lakes has the potential to benefit from the growing opportunities in Ontario due to the City's proximity to Toronto's production studios, and film industry workforce. Recent reports indicate a 50 -person film crew can have an economic impact of \$3,000 per day increasing to \$9,000 per day for crews spending the night in the community¹⁵.

Key elements for supporting a film industry include:

- An inventory of filming locations with detailed property information and image library
- Information and promotional materials targeting film production
- Film production procedures and permitting
- A film liaison responsible for responding to requests for information, timely processing of permits, coordinating access to filming locations and other municipal services such as road closures

¹⁵ [Brantford Expositor Article](#)

- Support services (hotel accommodation, restaurants, mobile catering services, equipment rental, couriers, lumberyards, temporary services and car rental agencies).

Ontario Creates provides a variety of services to municipalities to facilitate film production most notably inclusion in the agency's location directory and location preparedness support.

g. Kawartha Lakes Destination Development Plan – Implementation Plan

Objective 1

Establish Kawartha Lakes as a leader in outdoor experiences

Boating

Recommended Action	Time Frame	Priority
1.1 Build itineraries to direct visitors to less visited locks the 3 locks (Lindsay, Kirkfield, Rosedale)	Immediate	High
1.2 Support improvements in the other three locks to meet Fenelon, Bobcaygeon locks' amenities	Long-term	High

Cycling

Recommended Action	Time Frame	Priority
1.3 Explore opportunities for fat bike experiences for winter months	Medium term	Medium
1.4 Develop supporting conventional and digital wayfinding	Medium term	High
1.5 Establish Kawartha Lakes as a select destination for trail cycling	Long term	Medium

Hiking

Recommended Action	Time Frame	Priority
1.6 Ensure funding for on-going trail maintenance	Short-term	High
1.7 Include opportunities for natural interpretation in the trail network trails, incorporate historical, cultural and arts landmarks into Kawartha Lakes' trails	Long term	Medium

Objective 2

Build culinary, local culture and accommodation infrastructure

Culinary

Recommended Action	Time Frame	Priority
2.1 Connect restaurants with local food providers	Medium-term	High
2.2 Implement the Growing Food Tourism Strategy	Short-term and ongoing	High
2.3 Support local food producers to expand visitor experiences, increasing tourism activity and revenue.	Short-term and ongoing	High
2.4 Tell the story of local food producers	Medium-term and ongoing	Medium
2.5 Connect restaurants with heritage organizations – encourage use of heritage references in menu offerings	Long-term	Nice to do
2.6 Create a brewery itinerary and map	Immediate	High

Events

Recommended Action	Time Frame	Priority
2.7 Support the development of cultural events in natural environment, with artisans and local food	Medium-term	High
2.8 Support the establishment of a juried art show themed around Kawartha Lakes' natural assets	Long-term	Medium

Downtown Main Streets

Recommended Action	Time Frame	Priority
2.9 Provide public spaces for events	Long-term	High
2.10 Incorporate public art, street furniture, streetscaping in the downtowns, recognizing the character of individual communities	Long-term	Medium
2.11 Consider establishing design guidelines in the Community Improvement Plan	Long-term	Medium
2.12 Expand the CIP to support second story accommodation rental spaces	Medium-term	High
2.13 Target downtown businesses for tourism networking, workshops, bundling activities	Short-term and ongoing	High

Objective 2

Build culinary, local culture and accommodation infrastructure

Accommodations

Recommended Action	Time Frame	Priority
2.14 Create itineraries for VFR and Airbnb hosts (also referenced under bundling)	Short-term	High
2.15 Establish a database of Airbnb/VRBO owners to share municipal information tourism marketing and event calendar information	Short-term	High

Wayfinding

Recommended Action	Time Frame	Priority
2.16 Consider the development of a municipal wayfinding strategy.	Medium-term	Medium
2.17 Distinguish key tourism offerings from current destination wayfinding program	Medium-term	Nice to do

Objective 3

Bundle Kawartha Lakes' offerings to expand draw and duration

Recommended Action	Time Frame	Priority
3.1 Expand branded tour development	Medium-term	High
3.2 Host package workshops for tourism stakeholders incorporating three components (food, event and tourist activity)	Medium-term	High
3.3 Host tourism event workshops for event organizers	Short-term and ongoing	High
3.4 Identify experiential tourism opportunities and host experiential tourism workshops for potential experience providers	Medium-term	Medium

Objective 4

Become a leader in sustainable tourism practices

Recommended Action	Time Frame	Priority
4.1 Establish a regenerative/ sustainable tourism mandate and standards	Medium-term	High
4.2 Lead by example. Adopt green principles in the tourism department	Short-term and ongoing	High
4.3 Advise tourism partners, operators, event organizers and related businesses on how to adopt green principles	Medium-term and ongoing	Medium

Recommended Action	Time Frame	Priority
4.4 Advise visitors on how to have a green trip	Medium-term and ongoing	Medium
4.5 Provide electric vehicle charging stations	Long-term	Nice to do
4.6 Explore sharing options to address visitor transportation demand in the summer months	Medium-term	Medium
4.7 Expand bike sharing opportunities in Kirkfield, Lindsay and Rosedale	Short-term	High
4.8 Support the development of the Active Transportation Strategy	Immediate	High
4.9 Develop itineraries that drive visitors to low traffic areas within Kawartha Lakes	Short-term	High

Objective 5

Allocate the necessary resources to implement the Destination Development Plan

Stakeholder Engagement

Recommended Action	Time Frame	Priority
5.1 Consult with the economic development cluster and tourism stakeholders on the potential for new experiences	Medium-term	High
5.2 Consult with the economic development cluster on branding the current outdoor active product with an off-season focus	Medium-term	Medium
5.3 Work with existing operators and event organizers to identify potential extensions to existing summer experiences	Medium-term	High

Recommended Action	Time Frame	Priority
5.4 Encourage event organizers to create a post Labour Day and winter tourist events	Medium-term	Medium
5.5 Develop a research bank to share best practices for tourism stakeholders	Long-term	Nice to do

Funding

Recommended Action	Time Frame	Priority
5.6 Explore opportunities to access RTO and provincial funding to support product development	Short-term	High
5.7 Host grant writing workshops for event organizers and other tourism stakeholders.	Medium-term	Medium

Human and Financial Resources

Recommended Action	Time Frame	Priority
5.8 Establish separate roles for tourism marketing and product development	Short-term	High