



Eastern Ontario Tourism Sector Assessment

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the Tourism Company



Outline

- Study Purpose and Objectives
- Study Area
- Study Process
- Deliverables
- Demand Assessment
- Supply Assessment
- Investment Opportunities
- Implementation Recommendations



Study Purpose

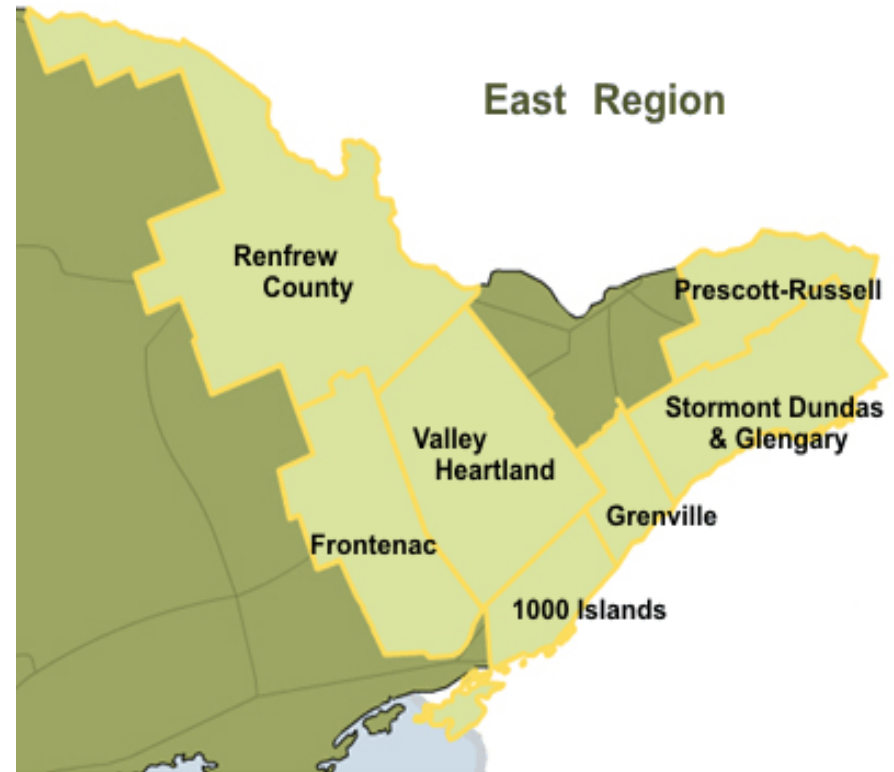
- To provide data, information, analyses and recommendations to help support OEECD's objectives of attracting and developing tourism assets in Eastern Ontario



Study Objectives

- Profile markets
- Identify product – winners and gaps
- Assess labour market
- Identify strategies
- Implementation plan
- User-friendly format

Study Area



Source: www.oacfdc.com



Study Process

- Market demand assessment
- Market supply assessment
- Product/market match
- Labour market assessment
- Strategic initiatives review
- Implementation plan
- Report preparation



Deliverables

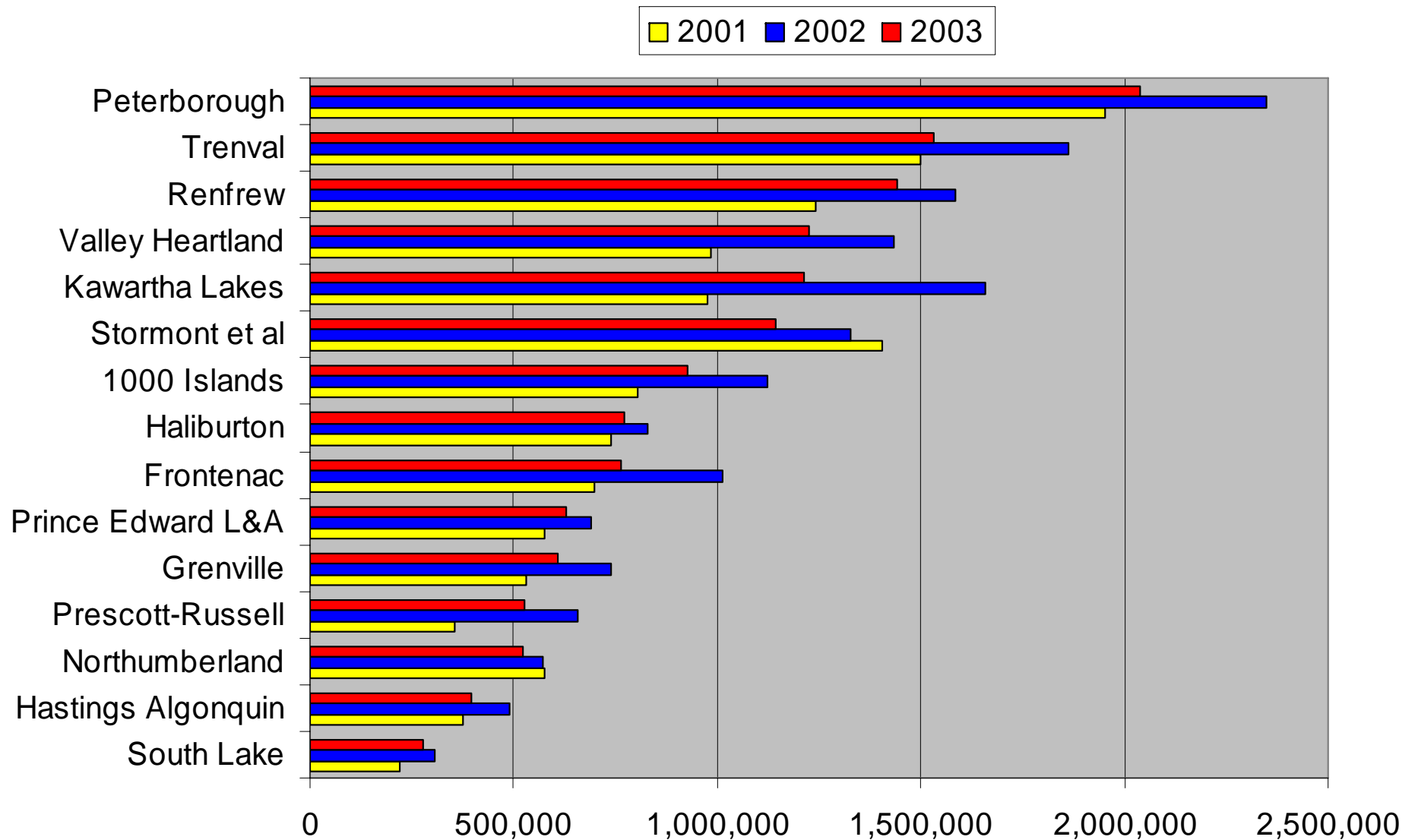
- Supply Database by Sub-Region
- Market Demand Model
- Sub-Region Profiles (15)
- Investment Opportunities
- Implementation Recommendations



Demand Assessment

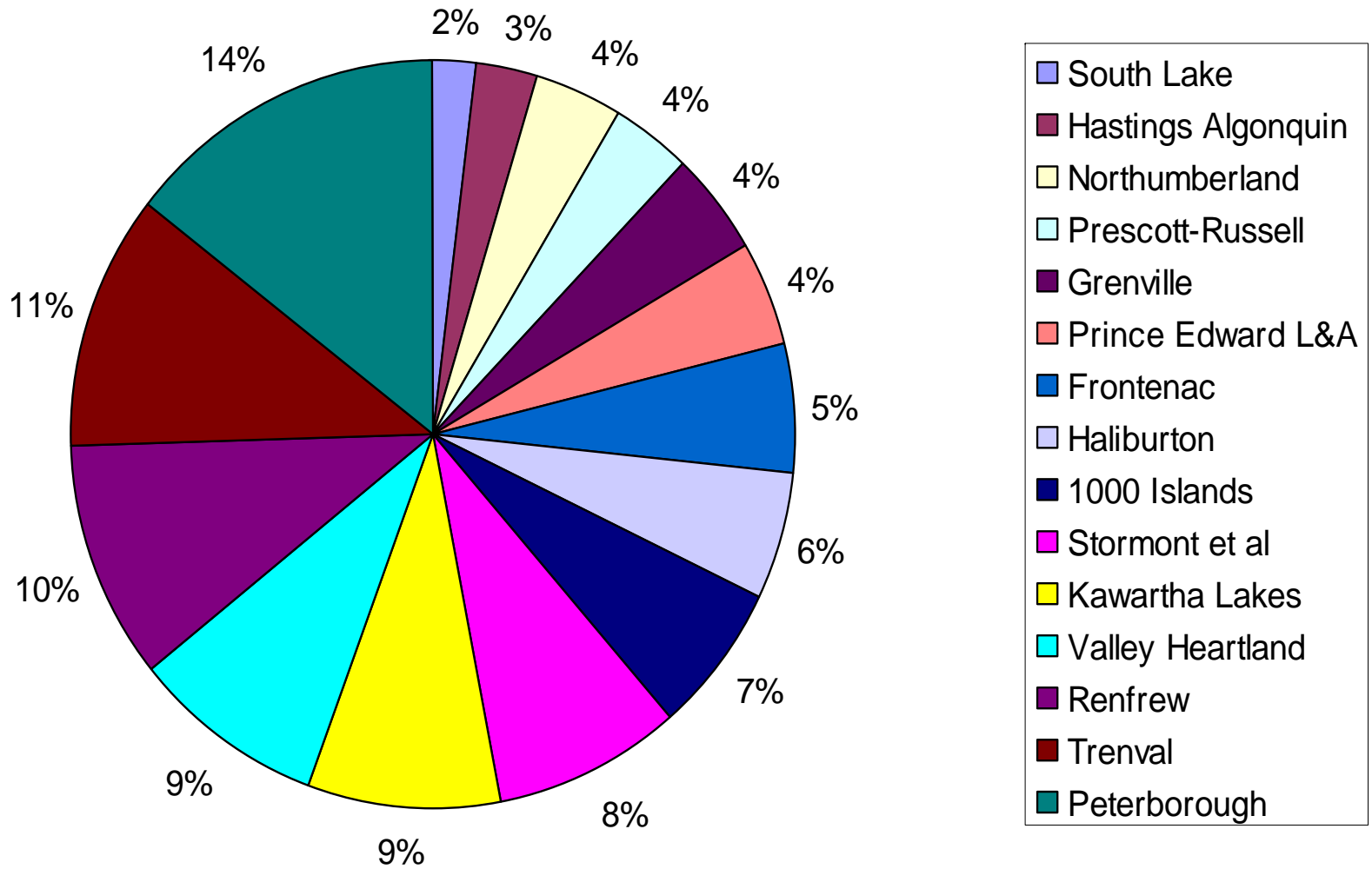
- Total Visits
- Visits by Length – Overnight & Same Day
- Visitor Spending
- Visitors by Origin
- Visits by Season
- Visit Forecast

Total Visits by Sub Region 2001-2003



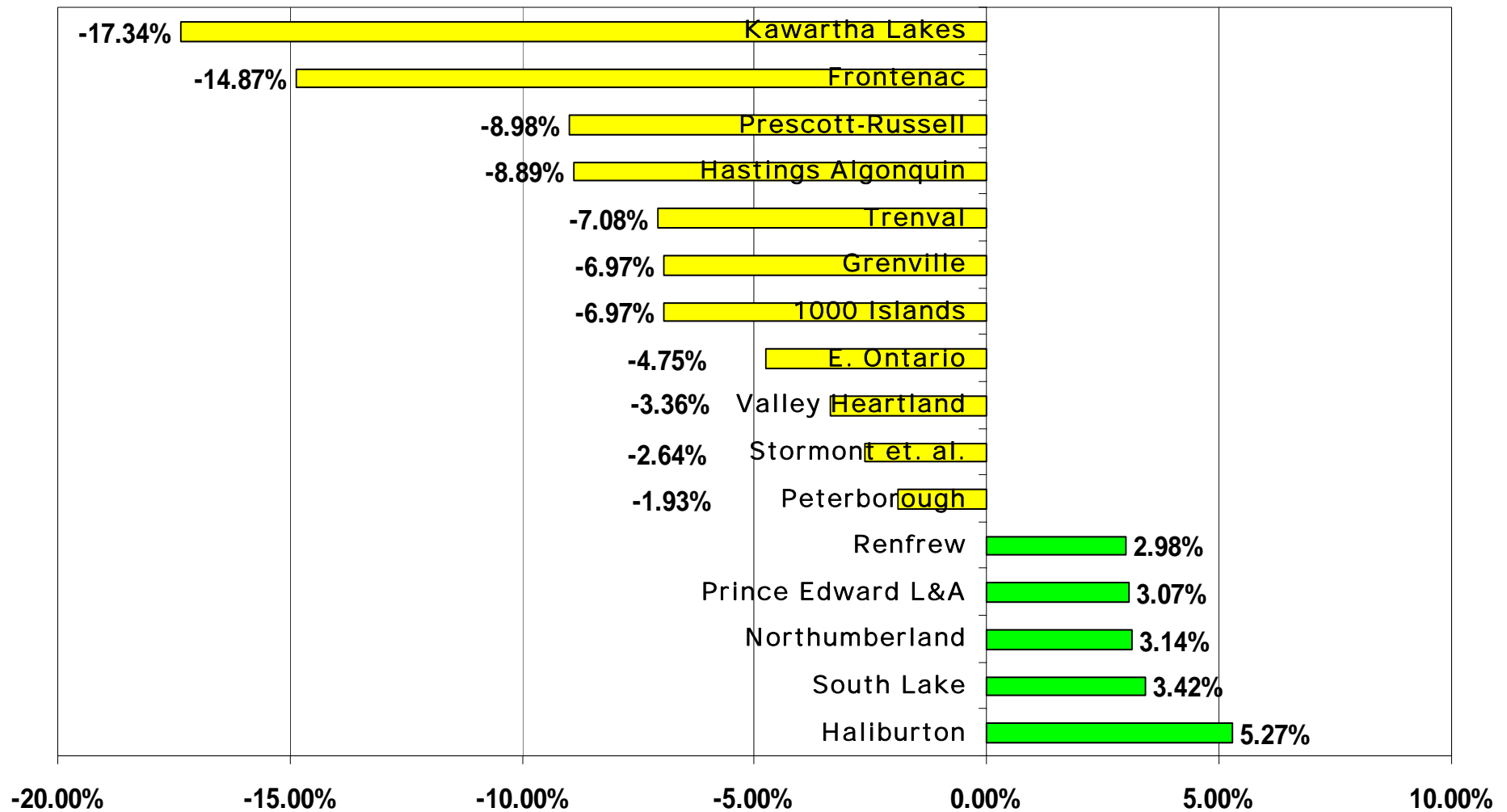
Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

Sub-Region Share of Eastern Ontario Visits 2003



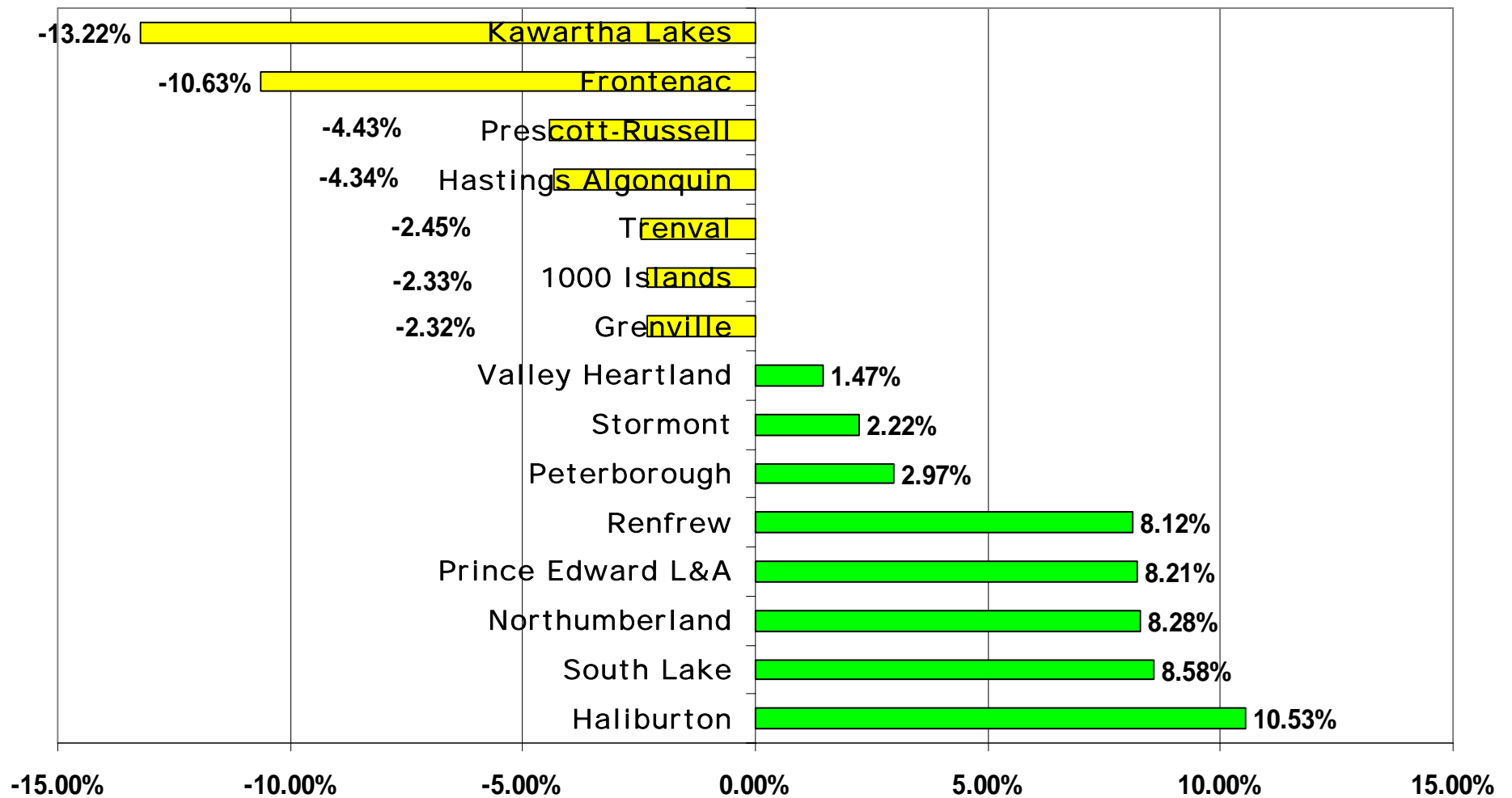
Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

Change in Ontario Market Share 2002-2003



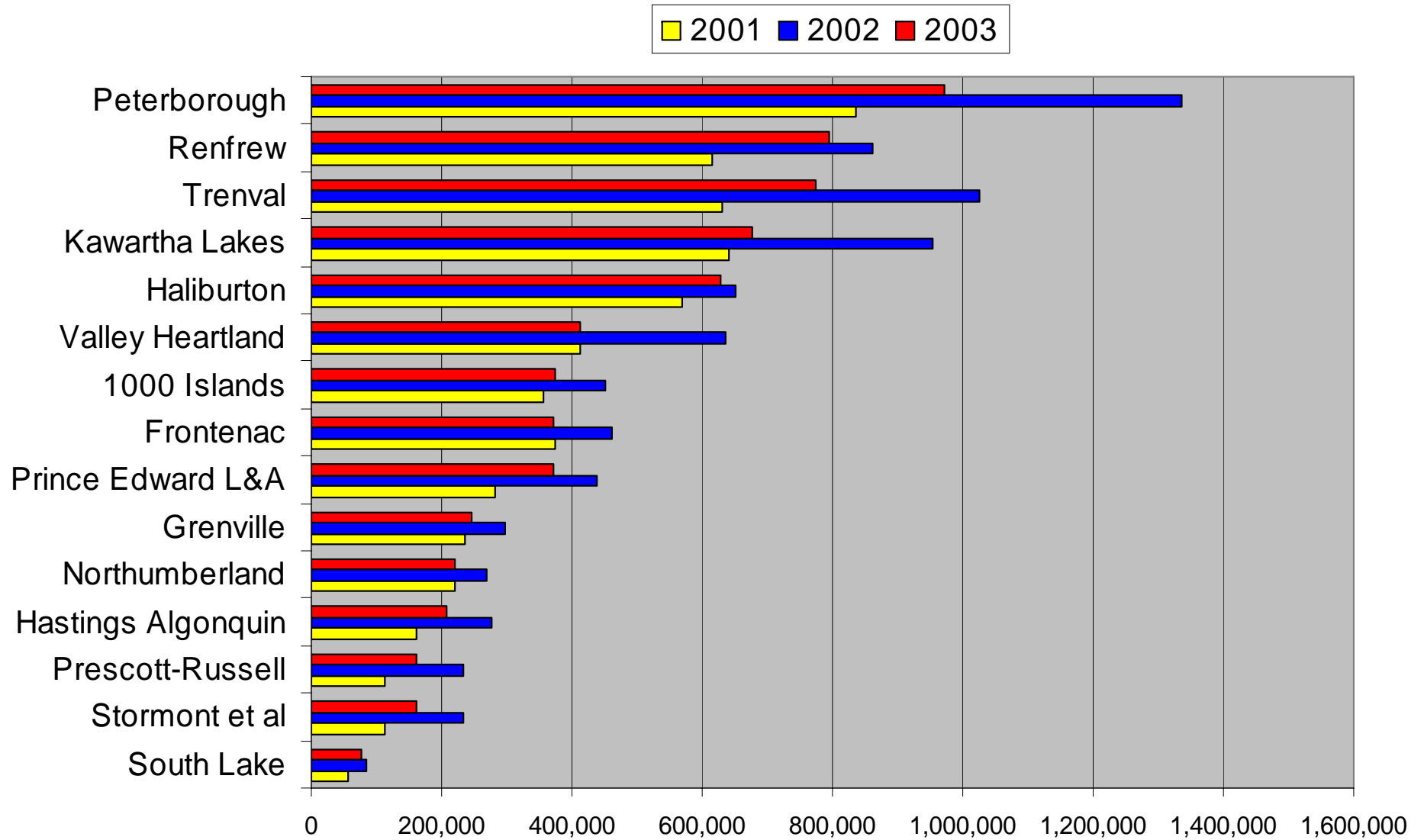
Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

Change in Eastern Ontario Market Share 2002-2003



Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

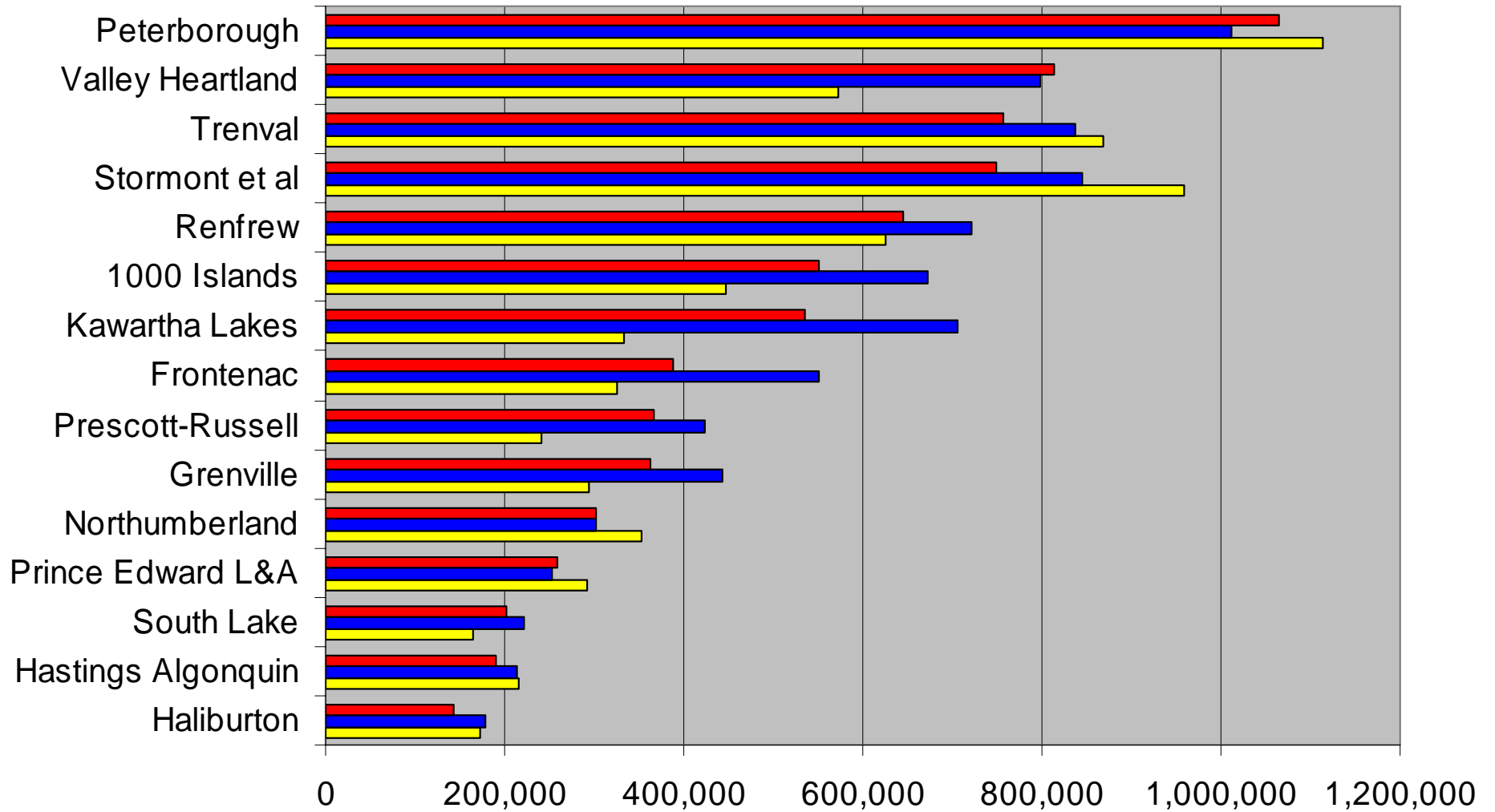
Overnight Visits by Sub-Region 2001-2003



Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

Same Day Visits by Sub-Region 2001-2003

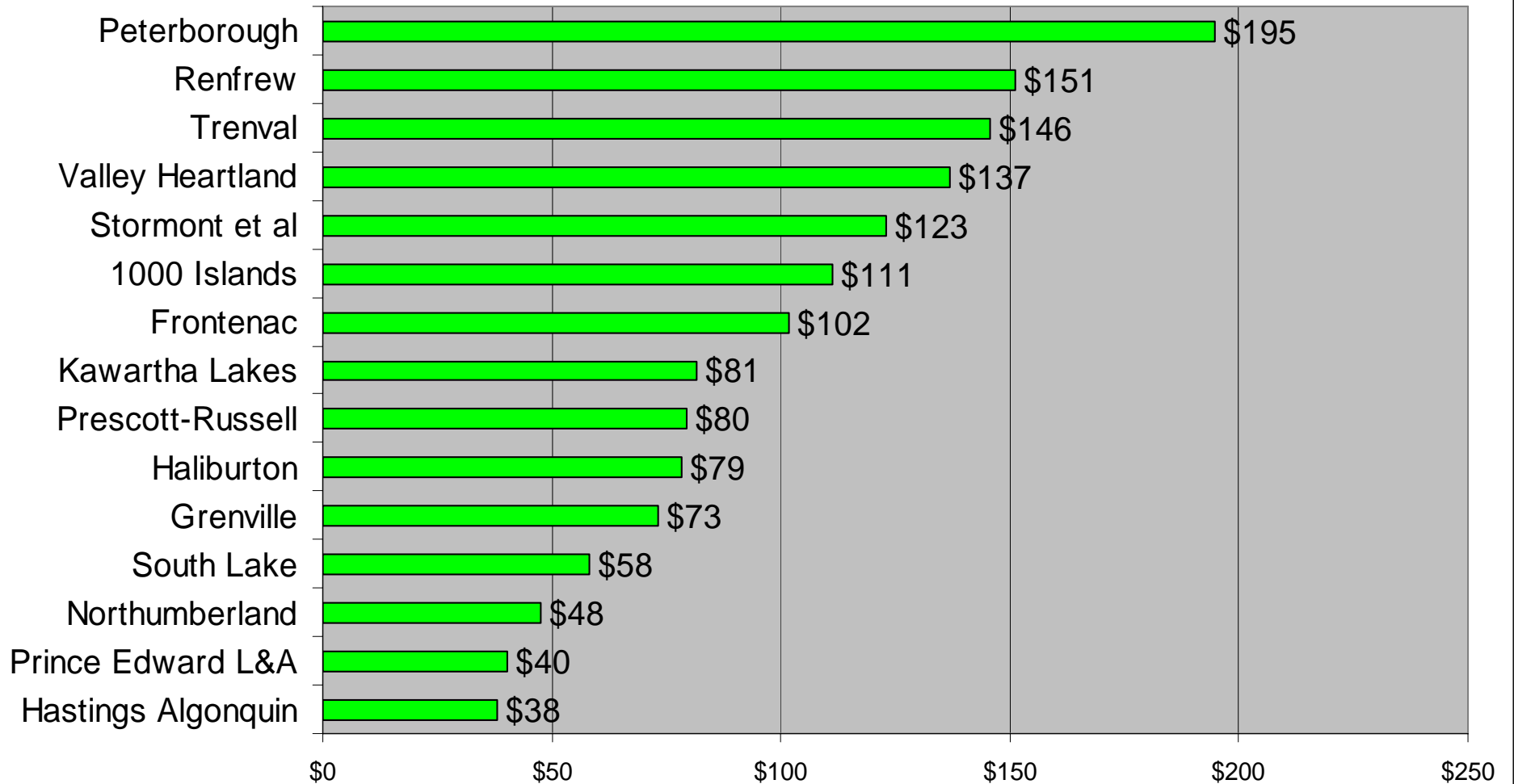
2001 2002 2003



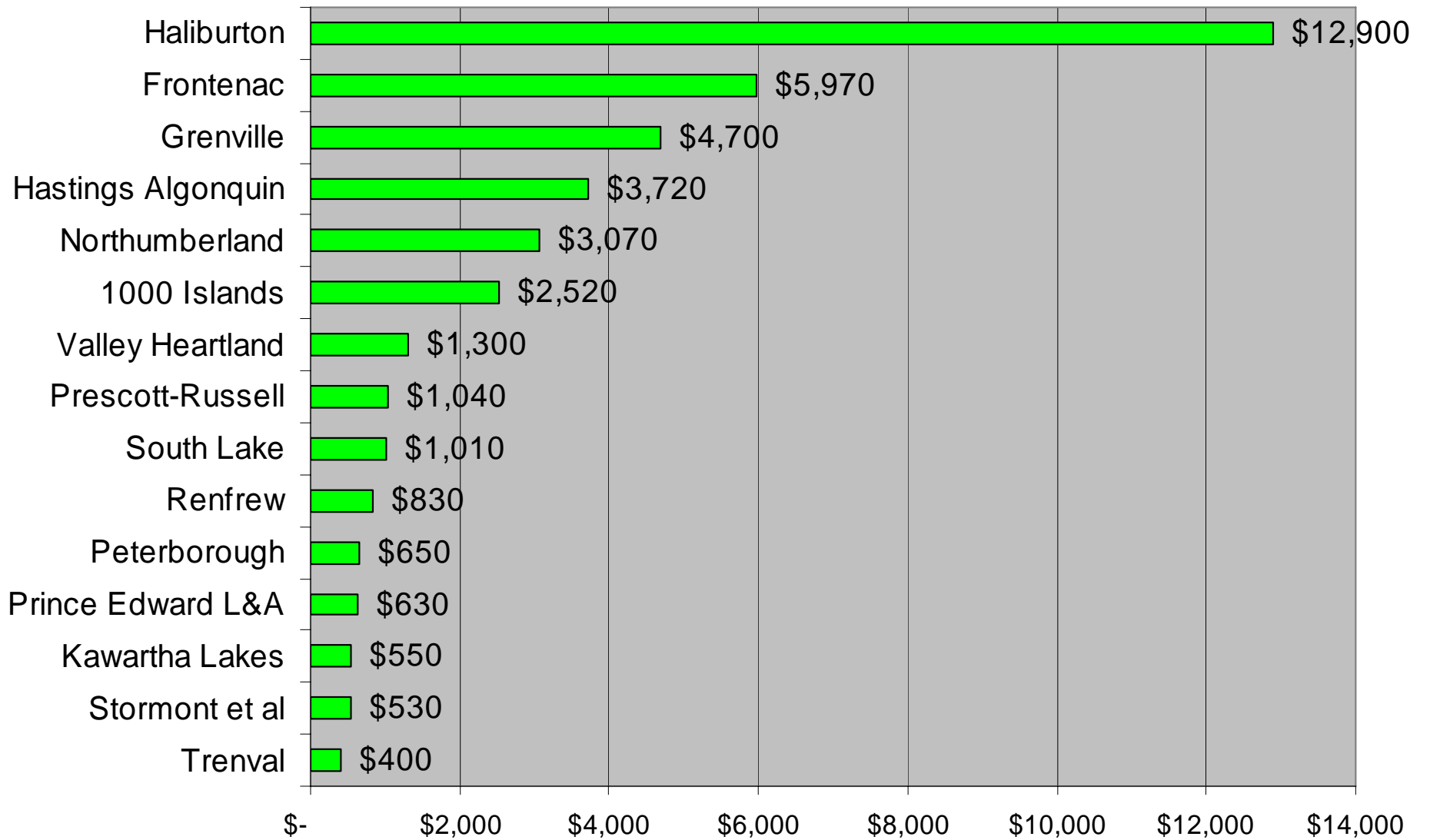
Sub-Region Ranking by Visits 2003

	Total Visits	Overnight	Same Day
1	Peterborough	Peterborough	Peterborough
2	Trenval	Renfrew	Valley Heartland
3	Renfrew	Trenval	Trenval
4	Valley Heartland	Kawartha Lakes	Stormont
5	Kawartha Lakes	Haliburton	Renfrew
6	Stormont	Valley Heartland	1000 Islands
7	1000 Islands	1000 Islands	Kawartha Lakes
8	Haliburton	Frontenac	Frontenac
9	Frontenac	Prince Edward L&A	Prescott-Russell
10	Prince Edward L&A	Grenville	Grenville
11	Grenville	Northumberland	Northumberland
12	Prescott-Russell	Hastings Algonquin	Prince Edward L&A
13	Northumberland	Prescott-Russell	South Lake
14	Hastings Algonquin	Stormont	Hastings Algonquin
15	South Lake	South Lake	Haliburton

Visitor Spending by Sub Region 2003 (\$ millions)

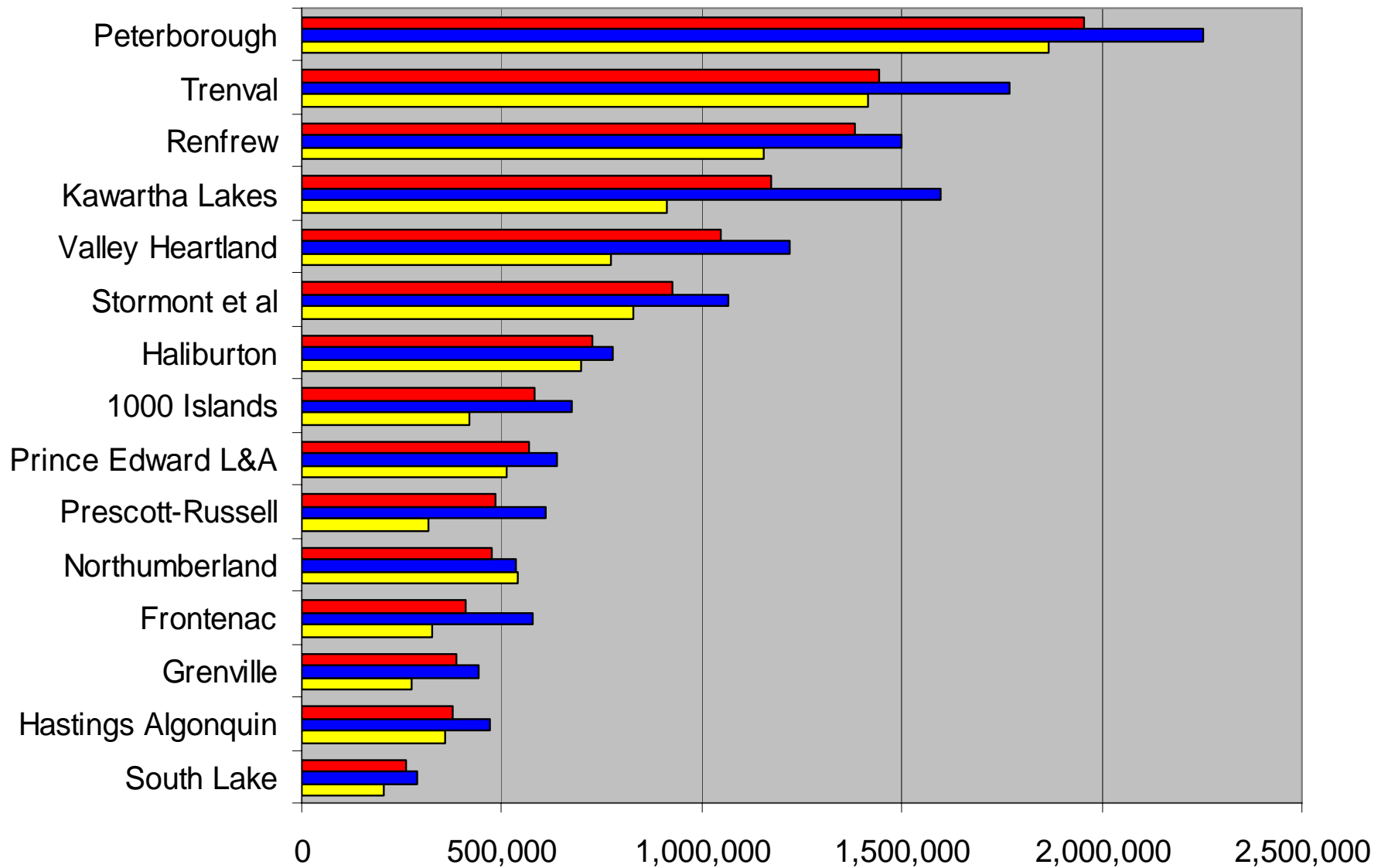


Visitor Spending Per Capita by Sub-Region 2003



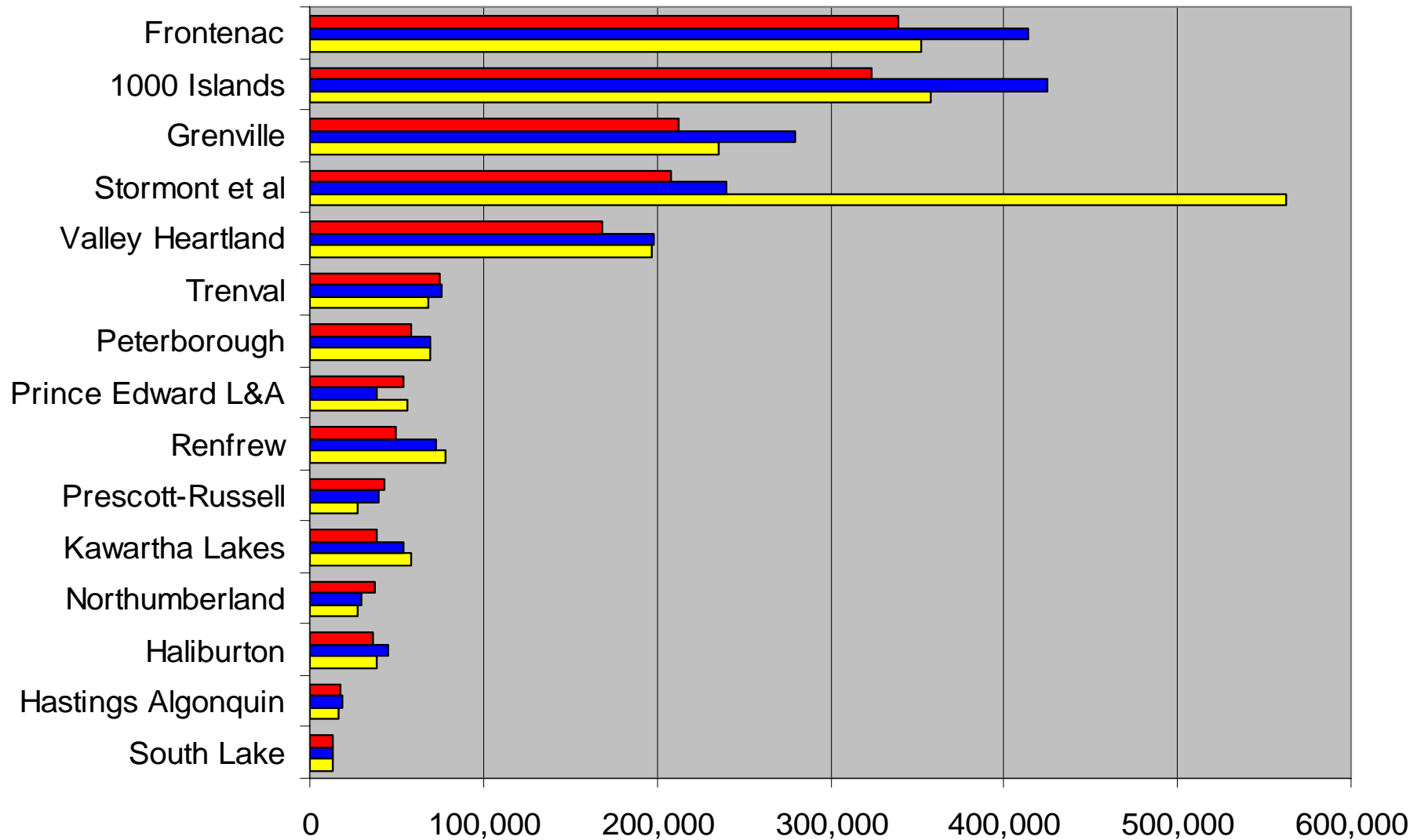
Domestic Visits by Sub-Region 2001-2003

2001 2002 2003



US Visits by Sub-Region 2001-2003

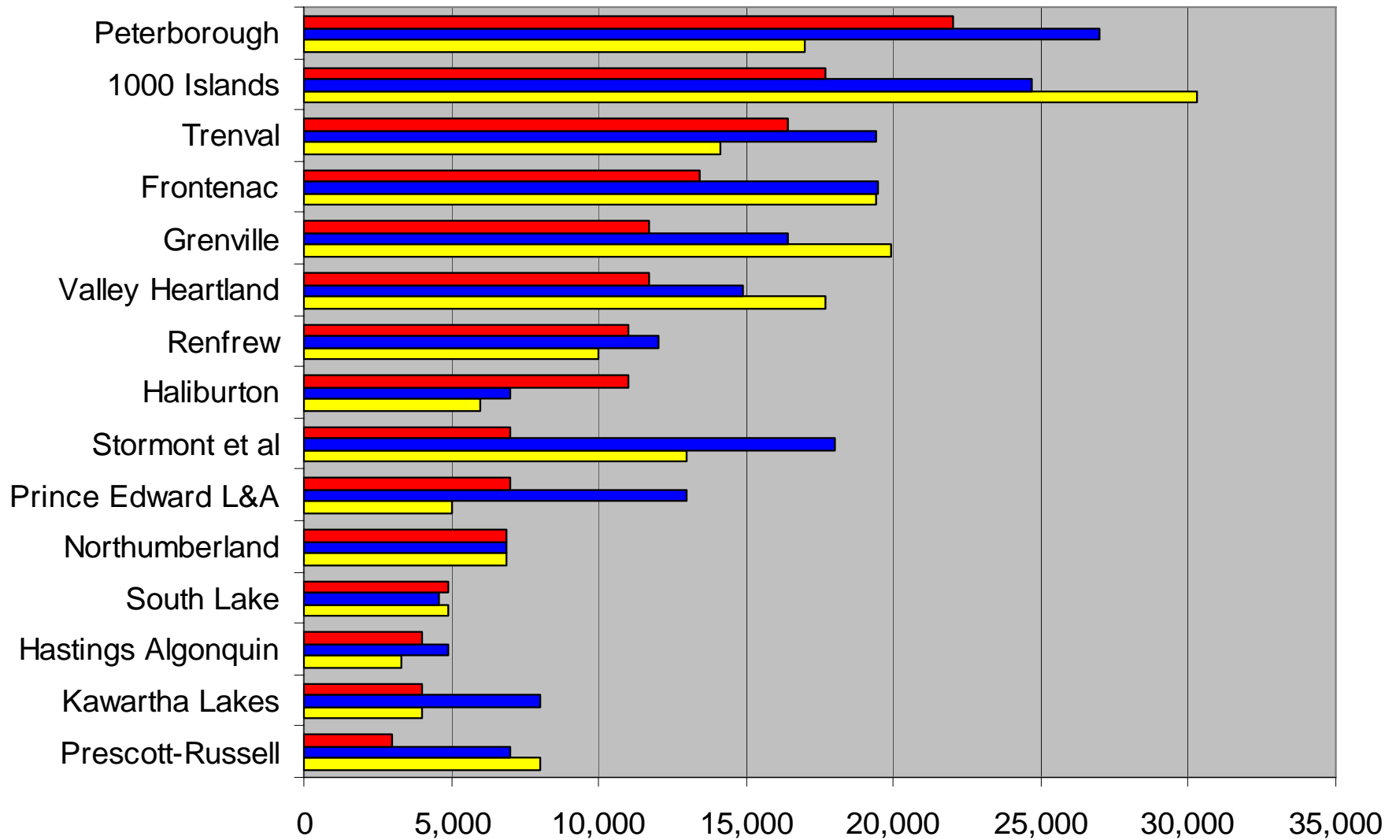
2001 2002 2003



Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

Overseas Visits by Sub-Region 2001-2003

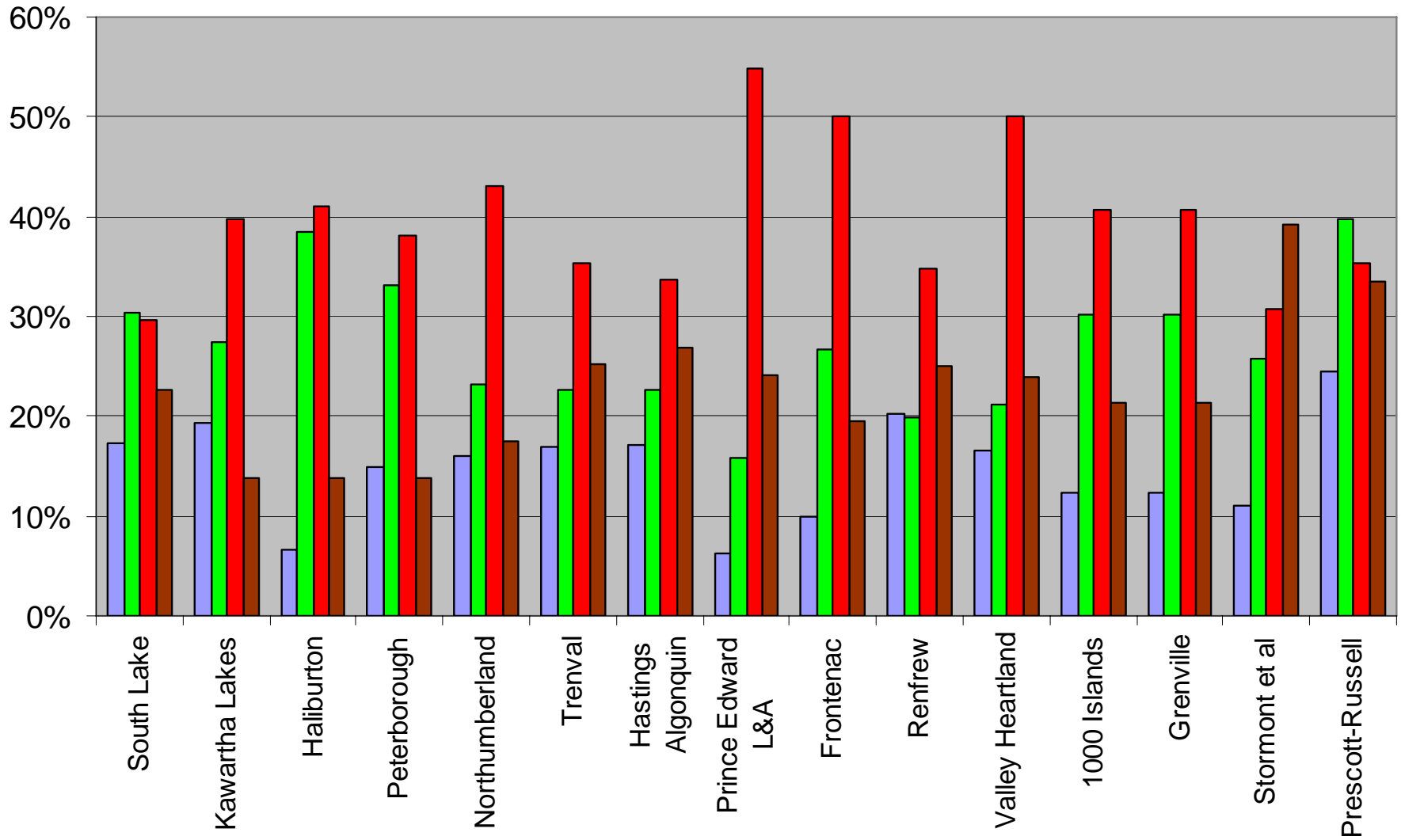
2001 2002 2003



Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

Visits by Season by Sub-Region 2003

Winter Spring Summer Fall



Source: Statistics Canada Canadian Travel Survey & International Travel Survey 2001, 2002, 2003; the Tourism Company 2005

Total Visits Forecast 2004-2014

	2004	2009	2014
Eastern Ontario	14,560,100	17,301,000	19,841,500
Peterborough	2,116,000	2,514,400	2,883,600
Trenval	1,591,700	1,891,400	2,169,100
Renfrew	1,497,900	1,779,900	2,041,300
Valley Heartland	1,273,000	1,512,700	1,734,800
Kawartha Lakes	1,260,100	1,497,300	1,717,100
Stormont et. al.	1,186,300	1,409,600	1,616,600
1000 Islands	961,300	1,142,300	1,310,000
Haliburton	801,900	952,900	1,092,800
Frontenac	791,500	940,400	1,078,500
Prince Edward L&A	654,400	777,600	891,800
Grenville	632,500	751,600	862,000
Prescott-Russell	549,500	653,000	748,800
Northumberland	541,600	643,600	738,100
Hastings Algonquin	412,100	489,700	561,600
South Lake	290,100	344,800	395,400

Source: Ontario Ministry of Tourism April 2005; the Tourism Company 2005



Supply Assessment

- Natural Resources

- Water-based recreation opportunities
- Land-based recreation opportunities
- Land & Water-based viewing opportunities

- Built/Managed

- Natural parks & sites
- Historic places, sites & tours
- Archaeological attractions
- Cultural attractions
- Sports venues/events
- Recreation/resort developments
- Amusement attractions
- Commercial venues
- Accommodation



Natural Resources – water-based recreation

Strong	Moderate	Weak
Kawartha Lakes Haliburton Peterborough Prince Edward L&A Frontenac Renfrew 1000 Islands	South Lake Northumberland Trenval Valley Heartland Grenville Stormont, Dundas and Glengarry Prescott-Russell	Hastings Algonquin

Source: the Tourism Company 2005



Natural Resources – land-based recreation

Strong	Moderate	Weak
Kawartha Lakes Haliburton Prince Edward L&A Frontenac Renfrew Valley Heartland	Peterborough Northumberland Hastings Algonquin 1000 Islands	South Lake Trenval Grenville Stormont, Dundas and Glengarry Prescott-Russell

Source: the Tourism Company 2005



Natural Resources – land and water-based viewing

Strong	Moderate	Weak
Kawartha Lakes Haliburton Peterborough Northumberland Hastings Algonquin Prince Edward L&A Frontenac Renfrew Valley Heartland 1000 Islands	Trenval Grenville Stormont, Dundas and Glengarry Prescott-Russell	South Lake

Source: the Tourism Company 2005



Built/Managed – natural parks and sites

Strong	Moderate	Weak
Haliburton Peterborough Northumberland Prince Edward L&A Frontenac Valley Heartland	Kawartha Lakes Renfrew 1000 Islands Hastings Algonquin Stormont, Dundas and Glengarry	South Lake Trenval Grenville Prescott-Russell

Source: the Tourism Company 2005



Built/Managed – historic places, sites and tours

Strong	Moderate	Weak
Peterborough Valley Heartland Stormont, Dundas and Glengarry	Kawartha Lakes Prince Edward L&A Frontenac Renfrew	South Lake Haliburton Northumberland Trenval Hastings Algonquin 1000 Islands Grenville Prescott-Russell

Source: the Tourism Company 2005



Built/Managed – archaeological/geological attractions

Strong	Moderate	Weak
Peterborough Hastings Algonquin Prince Edward L&A Renfrew	Trenval Valley Heartland Haliburton	South Lake Kawartha Lakes Northumberland Frontenac 1000 Islands Grenville Stormont, Dundas and Glengarry Prescott-Russell

Source: the Tourism Company 2005



Built/Managed – cultural attractions

Strong	Moderate	Weak
Haliburton Peterborough Renfrew Valley Heartland	South Lake Kawartha Lakes Northumberland Trenval Prince Edward L&A 1000 Islands Stormont, Dundas and Glengarry Prescott-Russell	Hastings Algonquin Frontenac Grenville

Source: the Tourism Company 2005



Built/Managed – sports venues/events

Strong	Moderate	Weak
Peterborough Renfrew	Kawartha Lakes Northumberland Trenval Prince Edward L&A Valley Heartland 1000 Islands Stormont, Dundas & Glengarry Prescott-Russell	South Lake Haliburton Hastings Algonquin Frontenac Grenville

Source: the Tourism Company 2005



Built/Managed – recreation/resort developments

Strong	Moderate	Weak
Haliburton Peterborough Northumberland Renfrew Valley Heartland	South Lake Kawartha Lakes Trenval Prince Edward L&A 1000 Islands Stormont, Dundas and Glengarry	Hastings Algonquin Frontenac Grenville Prescott-Russell

Source: the Tourism Company 2005



Built/Managed – amusement attractions

Strong	Moderate	Weak
Peterborough	Haliburton Trenval Prince Edward L&A Renfrew 1000 Islands Stormont, Dundas and Glengarry	South Lake Kawartha Lakes Northumberland Hastings Algonquin Frontenac Valley Heartland Grenville Prescott-Russell

Source: the Tourism Company 2005



Built/Managed – Commercial venues

Strong	Moderate	Weak
Peterborough Northumberland 1000 Islands	South Lake Kawartha Lakes Trenval Prince Edward L&A Frontenac Renfrew Valley Heartland Stormont, Dundas and Glengarry	Haliburton Hastings Algonquin Grenville Prescott-Russell

Source: the Tourism Company 2005



Built/Managed – Accommodation

Strong	Moderate	Weak
Northumberland Valley Heartland	Kawartha Lakes Haliburton Peterborough Trenval Prince Edward L&A Renfrew 1000 Islands Stormont, Dundas & Glengarry	South Lake Hastings Algonquin Frontenac Grenville Prescott-Russell

Source: the Tourism Company 2005

Investment Opportunities

	Rank	Weighted Score	Demand		Natural Resources			Built/Managed Resources									
			Existing Market	Market Proximity	Water Rec	Land Rec	Land/water view	Natural parks	Historic	Archaeological	Cultural	Sports	Recreation	Amusement	Commercial	Accommodation	
Renfrew	1	58	9	9	6	6	6	2	2	3	3	3	3	3	2	2	2
Peterborough	2	57	9	6	6	4	6	3	3	3	3	3	3	3	3	3	2
Valley Heartland	3	56	9	9	4	6	6	3	3	2	3	2	3	1	2	2	3
Kawartha Lakes	4	49	9	6	6	6	6	2	2	1	2	2	2	2	1	2	2
Prince Edward L&A	5	48.5	6	4.5	6	6	6	3	2	3	2	2	2	2	2	2	2
Northumberland	6	48	6	9	4	4	6	3	1	1	2	2	3	1	3	3	3
1000 Islands	7	45	6	6	6	4	6	2	1	1	2	2	2	2	2	3	2
Haliburton	8	44	6	3	6	6	6	3	1	1	3	1	3	2	1	2	2
Stormont et. al.	9	43	9	6	4	2	4	2	3	1	2	2	2	2	2	2	2
Trenval	10	41	9	6	4	2	4	1	1	2	2	2	2	2	2	2	2
Frontenac	11	40	6	3	6	6	6	3	2	1	1	1	1	1	1	2	1
Prescott-Russell	12	36	6	9	4	2	4	1	1	1	2	2	1	1	1	1	1
South Lake	13	32	3	9	4	2	2	1	1	1	2	1	2	1	2	1	1
Grenville	14	31	6	6	4	2	4	1	1	1	1	1	1	1	1	1	1
Hastings Algonquin	15	30	3	3	2	4	6	2	1	3	1	1	1	1	1	1	1

Source: the Tourism Company 2005



Implementation Recommendations – Marketing Tactics

- Maintain/update supply and demand databases
- Compile/update list of investor prospects
- Prepare/distribute investment information kits

Thank you ... Questions???

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