



Tourism Strategy

DRAFT I

July 5, 2012

Table of Contents

Executive Summary.....	3
Context for Planning	4
Background	4
Relevant Reports and Strategies.....	5
Things in Play	6
Industry Consultation.....	9
Current Tourism Landscape	13
Petawawa’s Tourism Strategy.....	17
Findings / Observations	17
Tourism Strategy Goals.....	20
Directional Tourism Strategies.....	21
Implementation / Next Steps.....	25
Appendix	27
Appendix A - Petawawa Tourism Industry Questionnaire.....	27
Appendix B – Consultation Invite.....	28
Appendix C – Industry Consultation Attendee List.....	29

Executive Summary

To follow upon endorsement of DRAFT I by Town staff and Destination Development Committee

Context for Planning

Background

In August of 2011 the Town of Petawawa released its 2011 Strategic Planning Document. The plan contained the details of a 5 year strategy designed to positively impact the economic well-being of the town and its residents. The strategy articulates the town's Vision, Mission, Core Values and Strategic Goals. Among the 5 stated Strategic Goals is an objective that specifically addresses the desire for the town to "become a centre of excellence" in the areas of recreation, culture and tourism.

To become a centre for excellence in recreation, culture and tourism

In order to help meet this objective the town retained the services of BRAIN TRUST Marketing & Communications (BT) to facilitate a process to assist in the development of a comprehensive tourism strategy for Petawawa.

The Tourism Strategic Plan is to provide the framework for tourism marketing, promotion and development in the Town of Petawawa. The overarching purpose of the project is to develop a strategic plan for tourism that supports the town's Vision and Mission as detailed in the Town of Petawawa Strategic Plan, 2011. The more fundamental purpose of the assignment is to develop, in consultation with Petawawa's tourism industry stakeholders, a strategy that will define the scope as well as the roles and responsibilities of tourism activities for the town of Petawawa. The Strategic Plan for Tourism will leverage the accomplishments of the 2002 Tourism Plan and provide new and relevant detailed tactics for advancing tourism through 2017.

The Town of Petawawa's vision for the next five years (2015) is:

Petawawa is known as the community of choice in Renfrew County and is recognized for its safe, vibrant and comfortable lifestyle.

The Town of Petawawa's mission is:

To help meet the health, safety and leisure needs of the Town of Petawawa's residents by the provision of efficient and effective public works services (transportation, water treatment and distribution, sewage collection and treatment), waste management, recreational and library services, land use planning, economic development and protective services (fire, police, animal control, building).

Relevant Reports and Strategies

In preparation of the tourism strategy BT referenced several reports and other relevant strategy documents. The Town's 2011 Strategic Planning Document provided a foundation for the development of the tourism strategy. Petawawa's 2011 Parks and Recreation Master Plan proved to be very useful. This plan in particular addresses many areas that are designed to have a direct and positive impact on the residents of Petawawa but in doing so positively impacts the destination and its appeal to current and potential tourists.

BT accessed and referenced tourism reports produced by the Ontario Ministry of Tourism, Culture and Sport. The Ministry prepares and provides research information to the tourism industry on a regular basis. In particular BT sourced the Travel Activities and Motivation study (TAMS), the 2012 Travel Intentions report, and the traveler profiles for Renfrew County (2010 Statistics Canada data).

BT came to the project with direct knowledge of Petawawa's umbrella tourism organizations, namely Ontario's Highlands Regional Tourism Organization (OHTO) and the Ottawa Valley Tourist Association (OVTA). BT was active in the development of strategies for both these organizations in the past 18 months. BT completed, on behalf of OHTO a comprehensive tourism product assessment called the Premier Ranked Tourist Destination Framework (PRTDF). This project required that BT inventory and assess the tourism products and experiences available in Regional Tourism Organization 11 (OHTO) which includes Renfrew County and the Town of Petawawa. That report provided a series of product development and marketing recommendations for OHTO to implement as they developed and marketed this region.

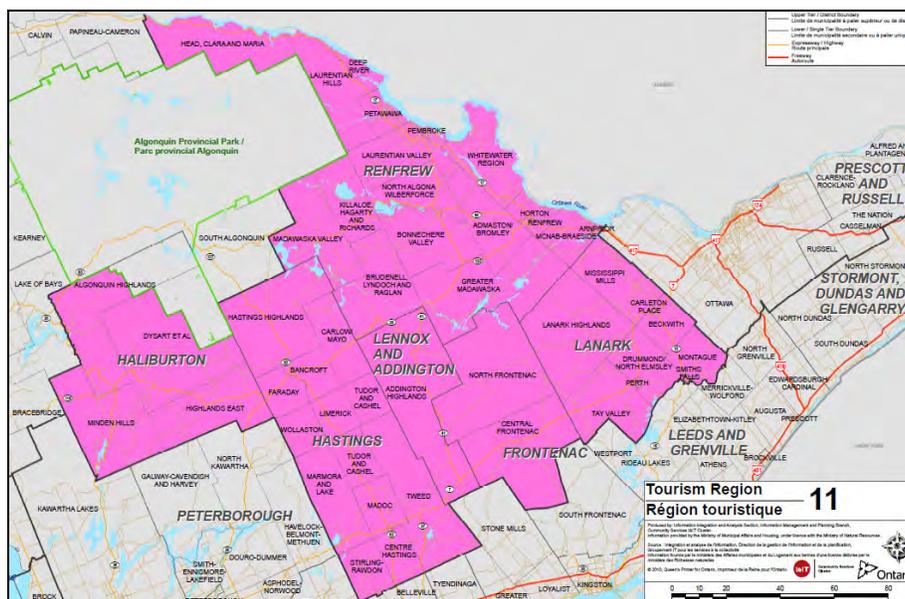
For the OVTA BT facilitated a similar sub-regional PRTDF process in order to drill down and identify the opportunities and gaps in Renfrew County's tourism offering. In addition BT facilitated a planning and strategy session with the OVTA Board of Directors which resulted in the development of many new organizational and marketing initiatives for the OVTA. This work along with their tourism strategy and destination development work in other parts of Canada provides BT excellent context for developing a relevant tourism strategy for the Town of Petawawa.

Things in Play

There are a number of *things in play* that may / will impact the development and implementation of Petawawa's tourism strategy. These factors have been taken into consideration in the development of the tourism strategy.

The creation of 13 new Ontario travel regions (RTO's) by The Ministry of Tourism, Culture and Sport back in 2010 will have a positive impact on any tourism strategy work being done in Petawawa. As a community within RTO 11 or Ontario's Highlands, Petawawa is part of a larger and more comprehensive travel region. With its creation OHTO brings resources for both destination development and marketing. Working with the tourism industry within the region OHTO has and will continue to implement a number of initiatives designed to make this region more competitive. Included in their activities has been the facilitating of a number of industry training and equipping sessions, the development of a partner website that contains tools and resources valuable to tourism operators and a consumer web site and online marketing strategy. OHTO has an annual budget of approximately \$950,000.

The Ontario's Highlands Tourism Organization (OHTO) is one of 13 Regional Tourism Organizations created by the Ontario government to increase tourism to the province. The OHTO covers a large area in eastern Ontario which includes the counties of Haliburton, Lanark, and Renfrew and portions of Frontenac, Hastings, and Lennox and Addington. The OHTO's mandate is to build and support a competitive tourism region through marketing and product development. The OHTO functions in partnership with established and recognized tourism organizations, municipalities and entities within the region to move forward in a spirit of cooperation and collaboration. The OHTO operates as a not-for-profit organization and was founded in October 2010. www.ohoto.ca



The Ottawa Valley Tourist Association is the destination marketing organization (DMO) most closely connected to Petawawa. Many tourism operators within Petawawa are members of the OVTA and take advantage of the numerous services this organization provides. The Town of Petawawa's Economic Development Coordinator also sits on the Marketing Committee of the OVTA. The OVTA partners with its industry members to create marketing activities that include the production of an annual visitor's guide, trail guides and maps, attendance at consumer travel and sportsman shows, operation of 10 tourist information centres, operation of a consumer web site and a series of advertising initiatives.

The Ottawa Valley Tourist Association (OVTA) is a non-profit organization designed to stimulate and promote tourism in Renfrew County. Our goal is to create a presence in the tourism marketplace. In order to position the Ottawa Valley as an interesting and popular travel destination in the minds of travelers, a joint effort among tourism suppliers and OVTA's dedicated tourism staff is required.

By working directly with these two umbrella tourism organizations Petawawa and its tourism industry operators can partner to maximize their effectiveness in both tourism marketing and destination development.

The Town of Petawawa prepared and released a comprehensive Parks and Recreation Master Plan in 2011. This plan contains numerous strategies and tactics that when implemented are designed to improve the quality of life for residents of Petawawa. As a result of this work many of the identified strategies and tactics will have a positive impact on the appeal of Petawawa as a visitor destination. With improvements and enhancements to its recreational facilities and infrastructure, residents along with visitors will have a much more pleasant experience. Of the 14 identified "Service Objectives" in the plan 6 (*italics* and **bold**) will have direct and positive impact on the ability for Petawawa to succeed on attracting a growing visitor market.

Parks and Recreation Master Plan Service Objectives

The following fourteen Service Objectives are intended to contribute to the public good in Petawawa, either economically, environmentally, personally or socially.

1. Provide more and better promotion of recreational opportunities
- 2. Expand and improve Petawawa's non-motorized trail system**
- 3. Redevelop Town parks within an integrated system**
4. Increase coordination and planning between Town staff and CFB Petawawa
- 5. Establish adequate reserve funds for the future replacement of recreation facilities**
6. Proactively support community groups and volunteers
7. Enhance leisure opportunities for youth and seniors
8. Increase physical activity among all Town residents
- 9. Increase opportunities in outdoor recreation**
10. Negotiate community access to new schools
- 11. Protect and enhance Petawawa's natural outdoor environment**

12. Enhance opportunities in arts and culture

13. Adopt a fee structure that is equitable and reflects the area market

14. Strengthen existing partnerships and explore new partnerships

Source: Town of Petawawa Parks and Recreation Master Plan, 2011

The Master Plan also contains 50 recommendations. Of those, when implemented, 14 would have direct and positive impact on the ability for Petawawa to succeed on attracting a growing visitor market.



Collaboration between the Town of Petawawa's tourism division and parks and recreation department is already underway. The tourism strategy will leverage work already being done through parks and recreation and capitalize on the specific activities that will enhance Petawawa's appeal as a visitor destination.

Industry Consultation

As part of the planning process BT engaged with a number of identified tourism industry leaders and the broader tourism industry in order to gain insight at the local level.

At the outset of the project an information gathering session was held with 4 tourism industry leaders and 2 town staff:

- Damien McCarthy - Gearheads
- Gabrielle Feldtanzer – Quality Inn & Suites
- Kim Clouthier – Kelsey’s
- Ed Chow – Roanoke Golf Course
- Kelly Williams – Manager of Parks & Recreation, Town of Petawawa
- Cyndy Philips-McCann – Economic Development Coordinator, Town of Petawawa

The purpose of this session was to ascertain levels of awareness and interest related to the development of the tourism strategy for the town. The session held at the town hall over a working lunch proved to be worthwhile. Those gathered were very interested in the possibilities of the creation of a tourism strategy that would have direct impact on the future success of the destination and in particular the tourism businesses in Petawawa. It was surprising to learn that for the most part these tourism industry leaders were unaware of the various marketing activities the town undertook on their behalf. While knowledgeable about their own business and sector within the tourism industry in Petawawa, the group was less aware of collective tourism related issues, challenges and opportunities. These individuals also were unaware of the relationships and opportunities associated with the partnership that exists between OVTA and the Town of Petawawa for example and had little knowledge of the activities and programmes implemented by the Ontario’s Highlands regional tourism organization.

This general lack of collective tourism awareness however did not impact the genuine desire of these tourism leaders to rally the tourism industry in Petawawa together behind the creation of a collaborative and collective tourism strategy.

As a second means to garner tourism industry input, BT created an information gathering survey (see Appendix A) that was distributed by the town prior to the industry consultation sessions. The survey was sent to over 52 tourism businesses as part as the industry consultation invitation (see Appendix B) and utilized the online survey tool Zoomerang. The short survey included 6 qualifying questions and 9 general tourism related questions. Thirteen tourism businesses took the time to complete the survey.

The survey generated the following information and results:

- 100% of the respondents consider themselves to be in the tourism industry
- These businesses have been in operation from 2.5 to 30 years
- Businesses were associated with the following sectors:
 - Festival or Event
 - Historic Site / Museum
 - Outdoor Recreation (4)
 - Retail
 - Accommodations (2)
 - DMO
 - Library
 - Retail
 - Family Indoor and Outdoor Recreation
- Business associated with tourism breaks down as follows:
 - 6 businesses derive 50% or more of business revenue from tourism
 - 3 businesses derive 25 – 49 % of business revenue from tourism
 - 4 businesses derive less then 24% of business revenue from tourism
- All businesses were somewhat or very interested in a collective approach to developing and marketing Petawawa as a tourism destination.
- Of the 13 businesses 12 felt that the development of a tourism strategy should be tourism industry led as opposed to town led.
- Of the 13 businesses 11 would be interested personally in contributing to the development of a tourism strategy for Petawawa.
- When asked what Petawawa’s primary tourism attractors are:
 - Outdoor recreation and activities (9); white water, trails, camping, fishing, paddling, kayaking, water sports, hiking & cycling, beaches
 - CFB Petawawa (3)
 - The beautiful natural setting (3)
 - Festivals & events (3)
 - Snowmobiling (3)
 - Petawawa River (2)
 - Military history
 - Link to Algonquin Park and the Ottawa River
 - The Heritage Village
 - Recreation
- When asked what one element would you add to Petawawa’s tourism offering the group provided this list of comments:
 - Trails (4) Better connection of the trail system, multi-use recreational trail using abandoned CP rail corridor, access to services along Petawawa Blvd and a trail system link from Pembroke to Mattawa.
 - Total revamp of the "downtown" core.
 - Bring business & existing attractions together; the elements that bring people to Petawawa are kept at a distance from businesses.

- More marketing of what we have to offer.
- Guided outfitter services (land & water)
- A local festival celebrating the heritage of Petawawa
- An arts focus, there are artists in Petawawa who have no outlet for their products; photographers, quilters, sculptors, weavers, knitters, others.
- Promote the amazing Civic Centre and all it offers including the library.
- Something cohesive; get our message out of what we have here and
- Get us all on the same page.

This information proved useful as a partial backdrop to the development of the strategy.

As an additional means of garnering industry input two tourism industry consultation sessions were held. One session was held on the evening of April 30 and a second session was held on the morning of May 1, both sessions took place at the Civic Centre. A total of 19 people attended these sessions (see Appendix C for attendee list).

BT facilitated each session and used the following agenda to guide the discussion and garner participant input:

Industry Consultation Session – Agenda

1. Setting the Stage – Context for Planning
2. Current Performance
3. Challenges and Opportunities
4. What’s Working, What’s Not
5. Identify Mid-Long Term Goals
6. OVTA Mandate
7. Identify and Discuss Current Opportunities
8. Establish Strategic Priorities
9. Review Implementation Process
10. Wrap Up and Next Steps

In these sessions participants became engaged in the planning process and contributed with relevant input on a number of levels. The learning from these sessions was valuable in the creation of the tourism strategy.

As an outcome of the session participants were asked if they would be willing to serve on a tourism destination development committee. Of the 19 people who participated 9 volunteered to serve on this committee.

A final means of industry input was initiated. Telephone calls were scheduled and held with several tourism leaders who were unable to participate in the industry meeting or consultation sessions. It was a challenge to reach many of the individuals on the call list as most were too busy to discuss the project however the successful calls garnered similar information and input to the consultation sessions.

The call with the representative at CFB Petawawa and the Military Museum was of particular interest. Given that the base plays prominently in the landscape and make up of the town BT was interested in getting their perspective on the idea of creating a tourism strategy. The Military Museum, Tank Park and the Afghanistan Memorial all offer potential tourism attractiveness yet in conversation with the museum representative it was revealed that attendance numbers at the museum is relatively small and that those who visit the museum are more then likely military personnel or their family and friends. Opportunities associated with leveraging the base and the museum will be presented later in the strategy.

Current Tourism Landscape

An overview of the current state of tourism within Canada, Ontario, Ontario's Highlands Tourism Region and Renfrew County is provided as a contextual framework for the development of the strategy.

Canada¹

In Canada, travel and tourism touches almost every sector of the economy. It generates \$74 billion in economic activity annually, with an impact that is equivalent to that of fisheries, forestry and agriculture sectors combined. Travel and Tourism is a job driver; 617,300 jobs were attributable to tourism spending in 2010. More than 1.6 million Canadians hold a job in the tourism sector which represents 1 in 10 Canadian workers. Tourism generates taxpayer value. Approximately 28 cents of every tourism dollar spent in Canada contributes to tax revenues resulting in more than \$19 billion in revenue for all levels of government. Tourism is one of the fastest growing economic sectors globally with annual growth outpacing the world economy

- In 2010, international visitors made 16 M trips to Canada, up 2.3% from 2009 but down 17% from 2000
- Tourism is a \$74B industry in Canada
- 1.6M people hold a job in the tourism sector
- Over the past decade, there has been a dramatic shift in the profile of travellers
- Currently, 80% of tourism revenue for Canada comes from domestic travellers, an increase from 65% in 2000
- Destinations are fighting for market share in a very crowded marketplace

More recent numbers from the Canadian Tourism Commission, August 2011²

- August 2011 saw a 5% drop in Americans coming to Canada, largely fuelled by a 7% reduction in auto travel
- Overall arrivals from the U.S. have dipped 2% to 8.2 million overnighters
- In the first quarter of 2011, U.S. visitor spending dropped 2% to \$797 million, however the average spend per trip rose 1% to \$530 per trip
- A total of 11.3 million international visitors have passed through Canadian passport control from January to August, down 2% from the same period last year
- Nova Scotia (14%) and Quebec (2%) are the only two provinces chalking up overall international visitor growth in 2011
- Arrivals from Mexico saw an 11% uptick in visitor numbers in August, this was its fifth consecutive monthly rise

¹ Canadian Tourism Commission (CTC) website, Tourism Industry Association of Canada website

² CTC website, Nov. 2011, http://en-corporate.canada.travel/content/ctc_news/tourism-snapshot-august-2011

- CTC's European markets remain largely under a cloud: there were 7% dips in overnight arrivals from both Germany and the UK, however, the France market offered a positive 1% upward move
- China outperformed CTC's other key international markets, posting a 29% surge in visitors to Canada in August '11, the fifth month in a row of double-digit growth
- Brazil (10%) and Australia (1%) also kept momentum in August, Australian travel spending took a big leap in Q1 2011, surging up 21%
- South Korea and Japan saw 17% and 9% declines in August
- Canadians continue to broaden their travel horizons, taking 3.5 million trips outside our country in August '11, up 5% from last year
- Canadian consumer confidence fell in August, affected by future job creation
- The Index of Consumer Confidence, released by The Conference Board of Canada, dropped 6.6 points on the previous month to 74.7
- US confidence was even lower; their Conference Board Consumer Confidence Index sank to 44.5, down 14.7 points in July 2011

Ontario³

In 2009 Ontario tourism receipts totalled \$21.0 billion representing 3.6% of the province's GDP. The tourism sector accounted for 315,000 jobs representing 4.8% of provincial employment and a total \$12.0 billion of labour income. Tourism in Ontario generated \$3.7 billion in Provincial tax revenues or 5.7% of all tax revenues generated. From a municipal perspective tourism generated \$.96 million in municipal tax revenues.

YTD December 2011

- Total Inbound Arrivals: 12,588,169 -1.4%
- Total U.S.: 10,783,486 -2.6%
- Total International: 1,804,683 +6.6%
- Total Outbound: 28,592,671 +7.8%
- Hotel Occupancy: 61%, +.6%
- Average Daily Rate: \$122.10 +.6%
- Visitor Inquiries: www.ontariotravel.net 3,276,990 -25.7%
- Travel Information Centre's: 927,887 -6.7%

³ Ontario Ministry of Tourism, Culture and Sport website, 2009, and YTD Dec. 2011

Ontario's Highlands⁴

- 2010 Total Visitors and Origin – 4,195,053
 - Canada – 3,992,226
 - Ontario – 3,875,198
 - Other Canada – 117,028
 - U.S. – 180,968
 - International – 21,859

Renfrew County⁵

- 2010 Total Person Visits – 1,063,630 –14.7% vs. 2009
- 2009 Total Person Visits – 1,247,000
 - 629,000 Overnight
 - 618,000 Day Trips
- Reason for the Visit
 - 563,000 Pleasure
 - 598,000 VFR
- Overnight Guests – 1,892,000 Person Nights
 - 1,369,000 Private home, cottage, cabin
 - 344,000 Roofed commercial accommodation
 - 116,000 Camping, trailer park
- Origin of overnight visits:
 - 528,000 Ontario – 84%
 - 61,000 Other provinces – 10% (50,000 Quebec)
 - 30,000 U.S. – 5%
 - 10,000 International – 2%
- Average length of stay - 3 nights
- Total spending by visitors \$116 million
 - Overnight - \$88 million, Day - \$28 million
- Expenditure for guests
 - Day Trips - \$45 (\$73 Ontario average)
 - Overnight - \$140 (\$285 Ontario average)
- Visitation By Quarter – (Total/Overnight Trips - thousands)

Q1	Q2	Q3	Q4
176	349	495	227
78	174	266	111

- Average party size 2.6, 79% Adults

⁴ Statistics Canada - Travel Survey of Residents of Canada / International Travel Survey, 2010 for RTO 11

⁵ Statistics Canada - Travel Survey of Residents of Canada / International Travel Survey, 2010 for Renfrew County

- Main Purpose of Trip
 - 563,000 Pleasure
 - 598,000 Visiting Friends Relatives (VFR)
 - Activity Participated – (Person Visits)
 - Any Outdoor/Sports Activity - 402,000
 - 194,000 Boating, 111,000 Fishing, 30,000 Skiing
 - Visit National or Provincial Nature Parks - 59,000
 - Museums/Art Galleries/Cultural Performances - 34,000
 - Historic Sites - 33,000

Petawawa's Tourism Strategy

Findings / Observations

As a result of the background work done BT developed a series of findings and observations. These will help shape the recommendations contained in the tourism strategy. It is however important to understand the complete backdrop on which the strategy is based. They are presented here to provide the needed context.

- It is evident that moving down a path to create a formal tourism strategy is welcome news for most tourism industry stakeholders we connected with through the consultation process
- The survey results as well as conversation with stakeholders revealed that the development of a tourism strategy should be *facilitated* by the Town but be driven by tourism stakeholders within the community
- Industry sessions and telephone interviews revealed a number of areas of opportunity to better leverage tourism in Petawawa, at the forefront is Petawawa's appealing outdoor recreation offerings, experiences and amenities
- Those who participated in the industry consultation sessions shared thinking on the majority of issues and opportunities associated with a collaborative approach to tourism development and marketing; there was significant consensus around most issues and opportunities
- The tourism industry in Petawawa is comprised of numerous businesses who operate independent of one another, while collaboration is thought to be beneficial few work together or share ideas for common benefit or to grow tourism on a town-wide basis
- While the Town leads most tourism related development and activity they do so on their own with little participation from tourism industry stakeholders
- While those tourism business owners and operators who participated in the sessions had ideas to contribute most did so not having an understanding of the larger tourism context, either on a national, provincial, regional or local level
- There is confusion among operators between generating business from local residents and generating business from those who come from outside the region; as a result some operators may not be *tourism market ready* and require orientation related to the merits of having a formal tourism strategy

- As part of the tourism strategy process BT was to evaluate the need for a visitor information centre; through the consultation process BT probed industry stakeholders on this subject and as a result came to the conclusion that there is little if any interest or need to build a tourism information centre within the town
- BT did generate ideas related to the need to service visitors while in town, a role of a visitor information centre and this will be addressed later in the strategy document
- There is a need to complete a tourism asset product assessment – this is an inventory of the tourism assets that are currently available as well as a list that identifies the underdeveloped and underperforming tourism assets located within the Town of Petawawa
- Limited signage for tourism related attractions, activities, trails and services are present; this is of primary concern to tourism industry stakeholders
- Sports tourism may provide an opportunity to grow visitation to the town and should be part of the tourism strategy
- Four season outdoor recreation experiences and activities is the number one core tourism attractor or reason to visit; this must be fully leveraged through development and marketing in order to grow tourism visitation and revenues. A coordinated approach among the Town of Petawawa and the tourism industry is needed to fully leverage this tourism asset
- Greater connections and alliances can be made between the Ottawa Valley Tourist Association, the Ontario's Highlands Tourism Organization and the tourism industry within Petawawa in order to facilitate the creation of more effective tourism destination development and marketing
- CFB Petawawa and the Military Museum represents an opportunity to present Petawawa as a unique tourism destination and to create new reasons for people to visit
- The awareness levels of the importance of tourism to the economic and lifestyle well-being of residents of Petawawa is low, strategies to build awareness levels are required
- As a result of the tourism industry consultation process there is a desire among those who participated to be involved in the development of a tourism strategy, 9 industry leaders have agreed to volunteer their time to serve on a tourism destination development committee

- Tourism destination development should be a the top of the list of activities the tourism industry, in partnership with the Town, attempts to undertake as part of the tourism strategy
- While tourism marketing is important, the Town of Petawawa and its tourism industry stakeholders must first consider implementing strategies designed to enhance the tourism market readiness of the destination before it invests in tourism marketing activities
- Currently tourism duties within the Town of Petawawa are handled by the Economic Development Coordinator. While this may well be within the current job description of this position, as the Town considers its role in facilitating the implementation of the tourism strategy it may need to rethink the resources allocated to this task

Tourism Strategy Goals

In order to measure the effectiveness of any strategy goals and objectives must be established. In the context of Petawawa's tourism strategy it is important to have a series of high level objectives to measure progress made related to the identified strategies. While it will be difficult to identify highly quantifiable goals and objectives based on the fact that absolute data is not available these goals have been established to provide some degree of accountability to the tourism strategy.

1. Rally tourism industry stakeholders around the identified tourism strategies found in this document and engage them at a high level in the implementation plan outlined in the pages that follow – specifically sign up / enrol 50 businesses in Petawawa's *Tourism Industry Collaborative*
2. Formalize Petawawa's Tourism Destination Development Committee and populate it with a minimum of 12 tourism industry leaders
3. Garner the endorsement for the strategies identified in this document from the majority of tourism industry stakeholders and the Town of Petawawa Council
4. Secure positive media attention with the launch of the Tourism Strategy
5. Begin the implementation of a minimum of 5 strategies identified in the plan and have them complete by December 2013

Directional Tourism Strategies

This series of tourism strategies is designed to form the basis of the Town of Petawawa's 2012 Tourism Strategy. They have been developed against the backdrop of the current realities of the tourism marketplace on a global, national, provincial and local scale.

Tourism remains a fiercely competitive business and destinations that undertake a systematic and strategic approach to both tourism destination development and marketing have a greater chance of reaping the economic benefits associated with tourism than those that don't.

To date the tourism industry and Town of Petawawa have not had a focused tourism strategy. With the completion of this strategy document, the endorsement of Town officials and industry stakeholders and clear steps for implementation Petawawa will begin to see increased tourism visitation, revenues and jobs.

1. Rally Petawawa's tourism industry stakeholders around the strategies detailed in this document, begin to work collaboratively as industry stakeholders and municipal government in the implementation of a prioritized list of tactics and activities designed to grow tourism visitation and revenues over the long term
 - a. Communicate the essence of the strategy in a series of public and tourism industry meetings and information sessions and attempt to secure understanding and engagement from a broad base of community influencers, elected officials, Town staff, residents and tourism industry stakeholders
 - b. Form a Tourism Destination Development Steering Committee, a group of business leaders whose primary mandate is to prioritize the list of strategies and to oversee the implementation of the prioritized list of recommendations and tactics
 - c. Take steps to engage tourism industry stakeholders through the creation of Petawawa's *Tourism Industry Collaborative*, this loose knit organization becomes the primary conduit for any and all tourism related activity, Town staff to create a data base of stakeholders and use this to communicate tourism related items on a regular basis, staff to coordinate quarterly tourism gatherings to further engage stakeholders in collaborative tourism activities
 - d. Encourage the tourism industry in Petawawa to become, if not already members of the OVTA, in doing so business owners can leverage the series of marketing initiatives the OVTA undertakes annually
 - e. Encourage industry participation on OVTA Board of Directors and committees
 - f. Encourage the tourism industry in Petawawa to become, if not already more active in understanding and participation in the activities of OHTO

- g. Encourage industry participation on OHTO Board of Directors and committees
2. Focus first on undertaking a formal tourism destination development process
 - a. Undertake a tourism asset assessment / inventory process in order to better understand the status of Petawawa's tourism competitiveness
 - b. Through the assessment process identify the gaps and opportunities associated with Petawawa's current tourism offering
 - c. Through the assessment process identify Petawawa's underdeveloped and underperforming tourism assets and develop strategies to enhance the underdeveloped assets and better leverage underperforming assets
 - d. Collaborate with OHTO and OVTA on the assessment process, similar assessments have been completed regionally and County-wide so a significant amount of information can be gleaned from their work, in addition consider following a streamlined version of the assessment process both organizations undertook
 3. Once the outcomes of the tourism assessment / inventory are known have the Destination Development Committee prioritize the action items and begin a proactive destination development implementation process
 - a. Focus initially on the "quick wins" those activities that will generate the greatest return in the shortest amount of time, these activities should be low / no cost tactics
 - b. Fully leverage the strategies and impending work and activity identified in the Parks and Recreation Master Plan, focus on the 6 cross over Service Objectives and 14 cross over Recommendations found in the plan, Town staff to bring these initiatives forward in the context of the tourism destination development process
 - c. Financial resources may be required for mid-long term tactics therefore begin to formalize the needs and communicate these to municipal officials in order to seek consideration in the Town's budgeting process
 - d. Form tactic specific industry working groups that align with the particular activity to implement the needed actions
 - e. Access relevant tourism development work being undertaken and offered to tourism stakeholders by OHTO, participation in OHTO related activity will benefit Petawawa (see Strategy # 1.f.)
 4. Clarification of the roles and responsibilities of the entities involved in tourism development, marketing and servicing is required therefore as part of the destination development process determine who does what when it comes to tourism within the context of Petawawa's tourism activities, consider these going-in premises when identifying roles and responsibilities
 - a. Destination development should be a shared role of tourism industry stakeholders and the municipality, OHTO may offer assistance here

- b. Tourism marketing should be a shared role of tourism industry stakeholders, OVTA and OHTO, the Town may have a role in facilitating some marketing activities but the vast majority of marketing initiatives should be done as a partnership between OVTA and the tourism industry, Town resources should not be dedicated to destination marketing (unless it is done as a cooperative with industry stakeholders)
 - c. Servicing visitors *while they are in Petawawa* should be the responsibility of the Town, things like printed and digital visitor information, maps, guides, way finding signage typically falls on a Chamber of Commerce or BIA but when those entities are not present the municipality often takes up this role and responsibility, this should be the case in Petawawa (see Strategy # 5.)

- 5. Visitor Information Centre (VIC) – Having a visitor centre in the community is not fundamental to properly servicing visitors; many destinations are getting out of the visitor centre business due to the high overhead costs and the changing behaviour of visitors (visitors are utilizing other tools such as Wifi enabled tablets and smart phones to get needed information)
 - a. In Petawawa however there is the opportunity to provide visitor information at the library located at the Civic Centre; we learned through the industry consultation process that library staff already distribute visitor information and offer some form of travel counselling to guests; with its central location, surrounding visitor amenities (hotels, restaurants, shopping) and close proximity to a number of visitor attractions (Heritage Village, sports fields, skate park, mini golf) it is a natural location for a visitor information centre, therefore it is recommended that this arrangement be formalized and steps be taken to officially designate the library as Petawawa’s Visitor Information Centre – the following steps should be considered:
 - i. Prepare a VIC operations plan
 - ii. Develop a VIC signage strategy (internal and external)
 - iii. Formalize staff duties (this should strive to be a self serve VIC)
 - iv. Consider ways to open the VIC on Sundays and holidays
 - v. Secure proper brochure racks and computer terminal
 - b. Alternatively during the consultation sessions staff from the airport offered to house a VIC at the airport, if the library location turns out to be not possible consideration should be given to enter into discussions with staff at the airport to determine VIC feasibility at that location (Note: the preferred location is the Civic Centre given its location in town)

- 6. Explore the opportunities associated with the development of a sports tourism strategy
 - a. Utilize the Parks and Recreation Master Plan to identify the sports related facilities found in and around Petawawa and determine capacity levels

for these facilities, (often times the facilities are operating at or over capacity limiting the opportunity to make them available for outside tournaments and competitions), be sure to access all sports related venues including trail systems, waterways, gymnasiums, sports fields etc.

- b. If a variety of facilities have capacity convene a meeting of individuals associated with amateur sports activities in and around Petawawa, these are typically volunteers who provide leadership for minor league sports activities, engage them in a conversation that explores the possibilities of putting in place a proactive strategy to attract outside sporting events to be executed by locally based volunteers (often times volunteers are at capacity supervising existing league play or executing of events and tournaments that already take place)
 - c. If this group of community sports leaders agree with the notion of implementing a proactive sports strategy formalize the process and begin the necessary work, at this stage your parks and recreation staff may be equipped to facilitate the creation of a sports tourism strategy or you may require the expertise of a sports tourism specialist (see The Canadian Sports Tourism Alliance website www.canadiansportstourism.com)
7. CFB Petawawa, its Military Museum, Tank Park and Afghanistan Memorial and Memorial Forest represents an underdeveloped tourism asset, it is recommended proactive discussions take place between Town officials and CFB Petawawa staff to explore the opportunities associated with more fully leveraging the base for the benefit of the tourism industry and visitors alike
- a. The base and its complementary visitor attractions have an opportunity to grow its visitation levels given the heightened level of awareness of Canada's role in current global military activities; a large number of Canadians as well as international visitors are drawn to things associated with the military, and it for this reason an opportunity exists to utilize these assets to grow the number of visitors who come to Petawawa
 - b. Military museums in Ottawa and Trenton are currently enjoying high levels of visitation, there is no reason CFB Petawawa can't realize similar notoriety
 - c. In discussions with military museum staff there is a willingness to engage in these discussions, there has been a change in the senior staff responsible for the museum and its related activities therefore the time is right to begin a proactive dialogue

Implementation / Next Steps

This tourism strategy contains a long list of strategies and tactics designed to positively impact Petawawa's success as a growing visitor destination. Having a plan that details the steps to be taken to improve effectiveness is sometimes more than half the battle. But having an effective implantation strategy often is the most important yet forgotten piece of the puzzle. Having the road map doesn't get one to the destination, putting the key in the ignition and the vehicle in drive is the only way to begin the journey of getting to the desired destination. Therefore strategy implementation is as important if not more important then having the strategy itself.

Implementation of the identified strategies in the context of where Petawawa and its tourism industry are currently at could be a significant challenge. For this reason implementation must follow a prescribed series of steps. Once one step is completed and a green light is given to proceed, only then can the next strategy step be entertained. Deviating from this process could risk short circuiting the tourism development process and create frustration among industry stakeholders and Town officials and staff.

Town of Petawawa staff will be required to facilitate the ongoing implementation process. In partnership with the Tourism Destination Development Committee (TDDC), staff will lead a process to garner endorsement of the strategy at Town Council and throughout the broader tourism industry. With this endorsement implementation can begin.

The strategies have been written in a way to provide a maximum level of direction. It will be up to the TDDC to drive implementation. As mentioned earlier in the document the committee may want to appoint task teams for some of the required work. In previous work we have done in other destinations Product / Experience Task Teams have proven useful. What follows below is an outline of the roles of such task teams.

Product/Experience Task Teams

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

The Mandate of Task Teams:

- Working together to explore opportunities to enhance the attractiveness and appeal of identified and qualified tourism products and experiences found in Petawawa, this will result in greater interest and ultimate visitation to Petawawa

- Utilizing the information learned from the assessment process as well as other research develop specific product and experience development strategies that are quantifiable and measurable
- Represent as best as possible the interests of the tourism industry in any recommended development strategies; ideally strive to initiate activities that impact the maximum number of tourism businesses within Petawawa
- Task Teams will take a leadership role encouraging the industry to collectively come together to improve in order to grow tourism visitation and revenues to the region as well as individual operators
- At the outset identify a series of deliverables and regularly report to the TDDC on progress

Facilitated by Town of Petawawa Staff Each Task Team Will:

- Identify a chair or co-chairs to lead the work of the team
- Attempt to populate the team with representatives from a cross section / size of business, each team should have a minimum of 6 and maximum of 10 members
- Meet regularly either in person or via conference call (the Town may choose to supplement meeting costs incurred by members)
- Focus attention on developing strategies that will enhance the attractiveness and appeal of the particular product or experience
- Create a high level operations process with identifiable deliverables
- Be accountable to the TDDC and regularly report on progress and activities (the Chair(s) may choose to do this through Town staff)
- Establish financial and human resource targets that serve to help meet the deliverables

Appendix

Appendix A - Petawawa Tourism Industry Questionnaire

Background, April 5, 2012

The purpose of the tourism industry stakeholder questionnaire is to gauge the knowledge of and interest in tourism issues and opportunities in order to inform in part the development of a tourism strategy for the Town of Petawawa. In addition the questionnaire has been designed to engage tourism stakeholders in a broader conversation and consultation process. It is the first attempt to rally tourism industry stakeholders in a proactive tourism development and promotion strategy.

1. Name of Business
2. Owner / Operator Name
3. Address
4. Telephone #
5. Email Address
6. Website
7. Would you consider your business part of the tourism industry in Petawawa?
8. In what tourism sector is your business?
 - a. Accommodations
 - b. Attraction
 - c. Historic Site / Museum
 - d. Outdoor Recreation
 - e. Festival or Event
 - f. Food & Beverage
 - g. Retail
 - h. Transportation
 - i. Industry Supplier
 - j. Other, please describe
9. What % of your business revenues comes from tourism?
10. Do you think a collective approach to developing and marketing Petawawa as a tourism destination is something you would be interested in seeing happen?
 - a. 1 = Not interested, 5 = Very Interested
11. Should the development of a tourism strategy for Petawawa be an “industry-led” process or should town officials take on this responsibility?
 - a. Industry-led____, Town____, In partnership_____
12. Would you be interested personally in contributing to the development of a tourism strategy for Petawawa?
13. What do you think is Petawawa’s primary tourism attractor?
14. If you could add one element to Petawawa’s tourism offering what would that be?
15. How long have you been in business?

Appendix B – Consultation Invite



Town of Petawawa, Economic Development Department
1111 Victoria St., Petawawa, Ontario K8H 2E6 • Telephone: (613) 687-5536 / Fax: (613) 687-5973 / Email:
cphillips@petawawa.ca

IMPORTANT TOURISM CONSULTATION SESSIONS AND INDUSTRY SURVEY

Dear Tourism Partner April 10, 2012

The Town of Petawawa in partnership with its tourism industry is in the process of developing a tourism strategy that will help shape and direct future actions related to the development and promotion of Petawawa as a tourism destination. In order to ensure the creation of both a relevant and realistic plan we are seeking your participation in the strategy development process.

Two consultation sessions have been scheduled on April 30 and May 1 in order to maximize participation. Town Council and town staff believes that the development an effective tourism strategy will be the result of participation from business owners who are already involved or wish to be involved in tourism related activities. Therefore we want to encourage you to make the time to contribute and be engaged in the process.

The town has retained the services of Brain Trust Marketing & Communications, a respected tourism destination development and marketing firm based in Mississauga Ontario. Richard Innes, their senior representative has been actively involved in tourism strategy development for more than 30 years. Recently he assisted Renfrew County with the development of their tourism strategy and has been directly involved in the formative stages of the creation of the Ontario Highlands Tourism Organization. Richard will facilitate the strategy development process and the consultation sessions.

Consultation Sessions:

April 30, 6:30 – 9:00 PM, Civic Centre **OR** May 1, 9:00 – 11:30 AM, Civic Centre

Please let us know what session you will attend.

RSVP Cyndy Phillips McCann, cphillips@petawawa.ca

Tourism Industry Survey

To help Brain Trust better understand the landscape of the tourism industry in Petawawa they would like you to complete a brief survey (it will take less than 5 minutes). Using the link below please take a few minutes to provide your opinion on matters related to your business and your connection to tourism related activities.

<http://www.zoomerang.com/Survey/WEB22FCCK82HSQ>

Thank-you for your participation. We look forward to seeing you at one of our sessions.

Appendix C – Industry Consultation Attendee List

The industry consultation sessions were attended by the following individuals:

April 30th

- **Jean & Byron Ostrom** – Portage Place B & B
- Jennifer Layman - Airport
- **Natalie Granter** - Airport
- James Carmody - Councillor
- Melissa Marquardt - OVTA

May 1st

- Alastair Baird – County of Renfrew
- Craig Kelley – County of Renfrew
- **Jessica Schmidt** – Qulaity Inn & Suites
- **Janet Coulas** – Petawawa Library
- **Ann McIntyre** – Petawawa Heritage Village
- **Cheryl Jordan** – The Country Cupboard
- Ed Chow – Roanoke Golf Course
- **Damien McCarthy** - Gearheads
- **Theresa Sabourin** - Councillor
- Kelly Williams – Manager, Parks & Recreation
- Mitch Stillman – CAO, Petawawa
- Bob Sweet – Mayor, Petawawa
- Kelly Thompson – Petawawa Library

Note: Those names that are highlighted bold volunteered to serve on the Tourism Destination Development Committee