



Tourism Destination Development Plan

Launch Sessions

Sept. 19, 20, 2022

BRAIN TRUST

Today's Agenda

1. Introduction & Background
2. Planning Context
3. Tourism Destination Management
4. New Realities
5. Bonnechere Valley Tourism Development Process

“We have become accustomed to acknowledging the Bonnechere Valley as the territory of the Algonquin people.

With increasing awareness of the past, this acknowledgement feels somewhat empty.

We are fortunate to have built a good relationship with Pikwakanagan and building on the good foundation we can now consider actions that will make this acknowledgement more meaningful and impactful for everyone in the territory.

We have a lot to learn and unlearn about our history. There may be some uncomfortable conversations ahead. We will not shy away from these conversations, instead we will face them with courage and respect for our neighbours in Pikwakanagan and Indigenous people everywhere.”

The Assignment

Carryout stakeholder engagement and consultation, industry analysis, development of a tourism strategy, and implementation plan, and final report.

RFP, Dec. 8, 2021



Partners

Township of Bonnechere Valley

Government of Canada

Ottawa Valley Tourism

Ontario Highlands Tourism



Government
of Canada

Gouvernement
du Canada

Canada



BRAIN TRUST



What's been the experience this summer?

What are your expectations for the tourism strategy?

- What's the one thing you think should be accomplished?
- For you, what's the end goal?



The Planning Context

International

- **Global air traffic 75%** of pre-pandemic levels through July 2022
- **International arrivals are at 46%** of pre-pandemic levels through May 2022
- **Overnight visitors are +221%** vs. 2021, 54% below 2019 levels through May 2022
- UNWTO's forecasts point to international arrivals reaching 55% to 70% of pre-pandemic levels in 2022

Source: International Air Transportation Association. Sept. 2022

UNWTO World Tourism Barometer. July 2022





USA

- June travel spending **surpassed 2019 for the third consecutive month** - \$105 billion
- June's **overseas visitation improved slightly** but remained 43% below 2019

Source: US Travel Association. Monthly Travel Outlook and Travel Statistics Report. July 2022.

Canada

- Total tourism spending in 2022 to reach **\$79.9 billion** - 24% (\$24.7 billion) short of pre-pandemic high-water mark
- Tourism spend at 72% of its 2019 level
- Domestic air connectivity improved to 90% of its 2019 level
- International seat capacity is at 84%
- DC estimates total spending to return to pre-pandemic levels by 2025



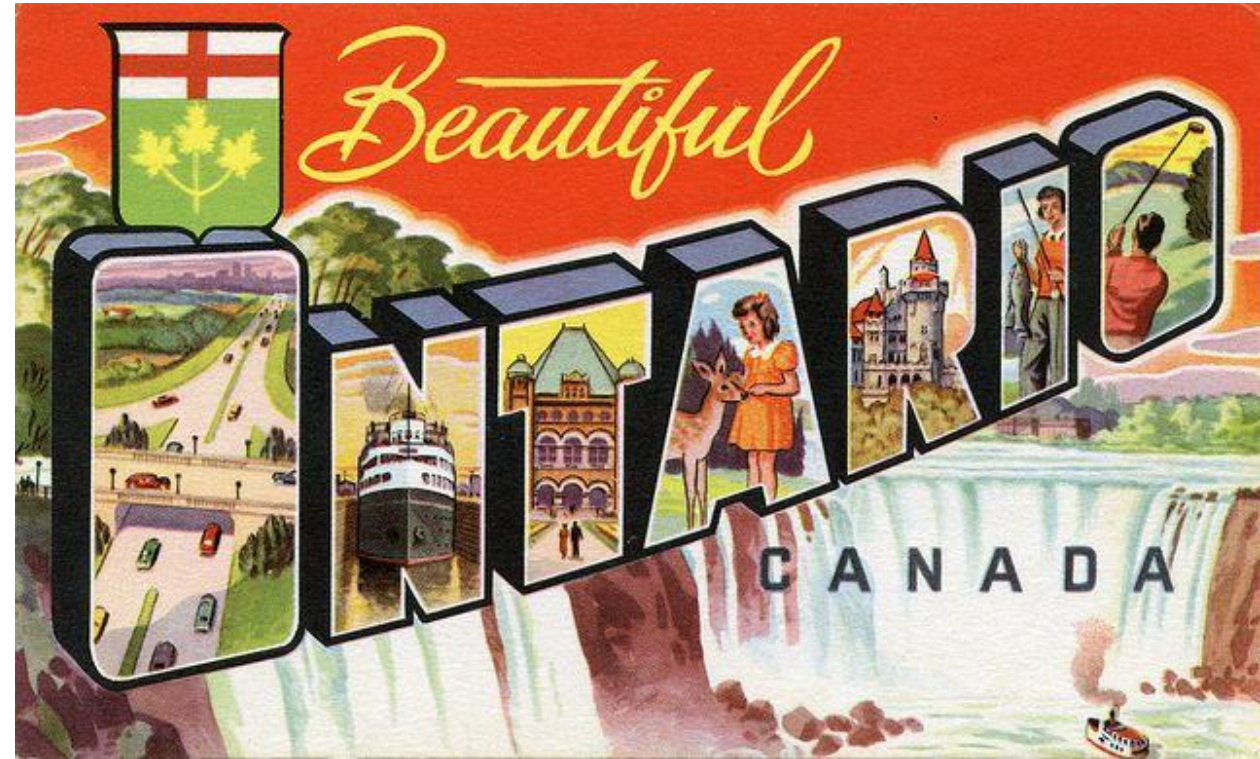
Source: Destination Canada. Spring 2022 Tourism Outlook Report



- 132m visits in 2019
 - 78m in 2020
- \$38b tourism receipts in 2019
 - \$13.5b in 2020
- 790,000 tourism jobs in 2019
 - 598,100 in 2020
 - 635,000 in 2021

Source: Government of Ontario. <https://www.ontario.ca/page/tourism-research-statistics#return>

- 2.7m Intl. Border Crossings though June 2022, +529%
 - US: 2.1m, +543%
 - Overseas: 569k, +480%



Source: Government of Ontario. <https://www.ontario.ca/page/tourism-research-statistics#return>



- Hotel occupancy 69% in 2019
 - 35% in 2020
 - 44% in 2021
 - 55% through June 2022
- Average Daily Rate \$163 in 2019
 - \$126.14 in 2020
 - \$128.80 in 2021
 - \$157.84 through June 2022

Source: Government of Ontario. <https://www.ontario.ca/page/tourism-research-statistics#return>



BRAIN TRUST

Tourism Destination Development



Tourism Destination Development

“A continuous process of understanding, coordinating, investing, developing and marketing the tourism potential of a destination in ways that provides value to communities, visitors and businesses”



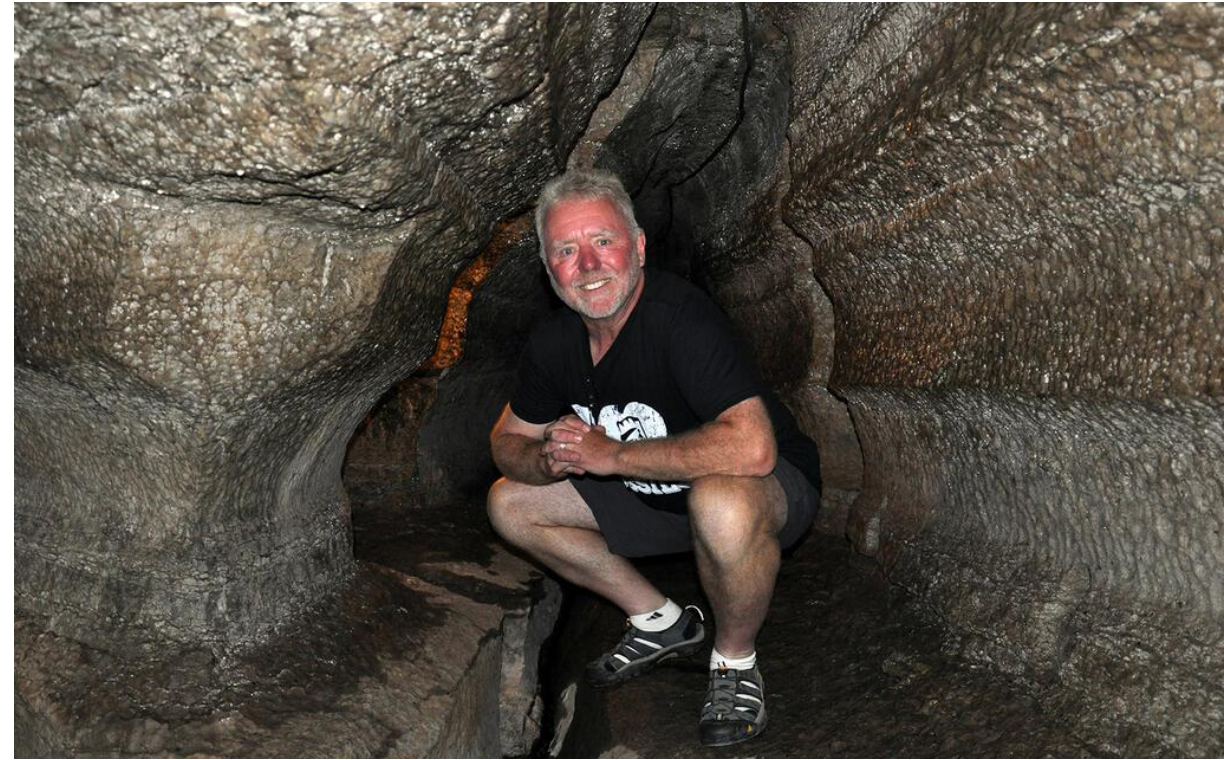


Tourism Destination Development
Identifies near-term opportunities and challenges and lays the foundation for longer-term initiatives to ensure responsible tourism success for the township, its citizens, tourism and other businesses.

Tourism Destination Development

Four Questions:

- What benefits are our guests seeking?
- How do we deliver unforgettable experiences?
- What can we offer that is uniquely ours?
- How do we deliver revenue to operators?





Tourism Destination Development

- Focus on strategic, collaborative, community-based development
- Success comes when everyone collaborates to identify opportunities and strategies to responsibly enhance our visitor economy

NEW REALITIES





- The hiatus from travel forced **new conversations**
- Industry and community leaders identified the need for a shift to more **responsible travel**

NEW REALITIES

Primary goal of tourism:

- Support a greater interest in the **wellbeing of communities and residents** vs. visitation growth and profits



NEW REALITIES

“Prioritizing profit over the health of the planet and wellbeing of people is not a legacy that the global visitor industry can continue.”

Destination Next. 2021 Futures Study. (Sept. 2021)

NEW REALITIES

- Progressive destinations are adopting a **regenerative tourism approach**
- Creates an ecosystem of innovation, collaboration and adaptation
- Energizes strong economic growth, thriving operations, sociocultural vibrancy, healthy people and natural environment for generations to come

NEW REALITIES

- Regenerative tourism is about guiding and supporting tourism development with **an equal focus on economics and the well-being of people and places** to measure success



NEW REALITIES

"The hosting economy is finally being seen for its power as a community-builder, a job generator, a path to reconciliation, a protector of natural assets, and as an enabler of Canada's identity and broader global ambitions. We want a sector that produces prosperous business growth and net benefits for our communities from a thriving, regenerative tourism ecosystem."

Destination Canada. Canada's Tourism Renaissance, Our Strategy for Recovery (Spring 2022)
destinationcanada.com

NEW REALITIES

"The hosting power as a com to reconciliation an enabler of ambitions prosperous bu communities

Destination Canada. Canada'
destinationcanada.com

CANADA'S TOURISM RENAISSANCE

Our Strategy for Recovery
SPRING 2022



ng seen for its generator, a path al assets, and as broader global t produces benefits for our erative tourism

covery (Spring 2022)

High Value Guests (HVGs)

Guests who make the Canadian tourism ecosystem thrive

- Appreciate Slow Travel
- Learners
- **Authentic Experiencers**
- **Cultural Explorers**
- **Free Spirits**
- Align with Destination Canada, DO, OHTO, OVTA, market segments





Thoughts, Reactions:
Tourism destination
development and the
new realities?
• Small group discussion

Tourism Destination Development Process





Process

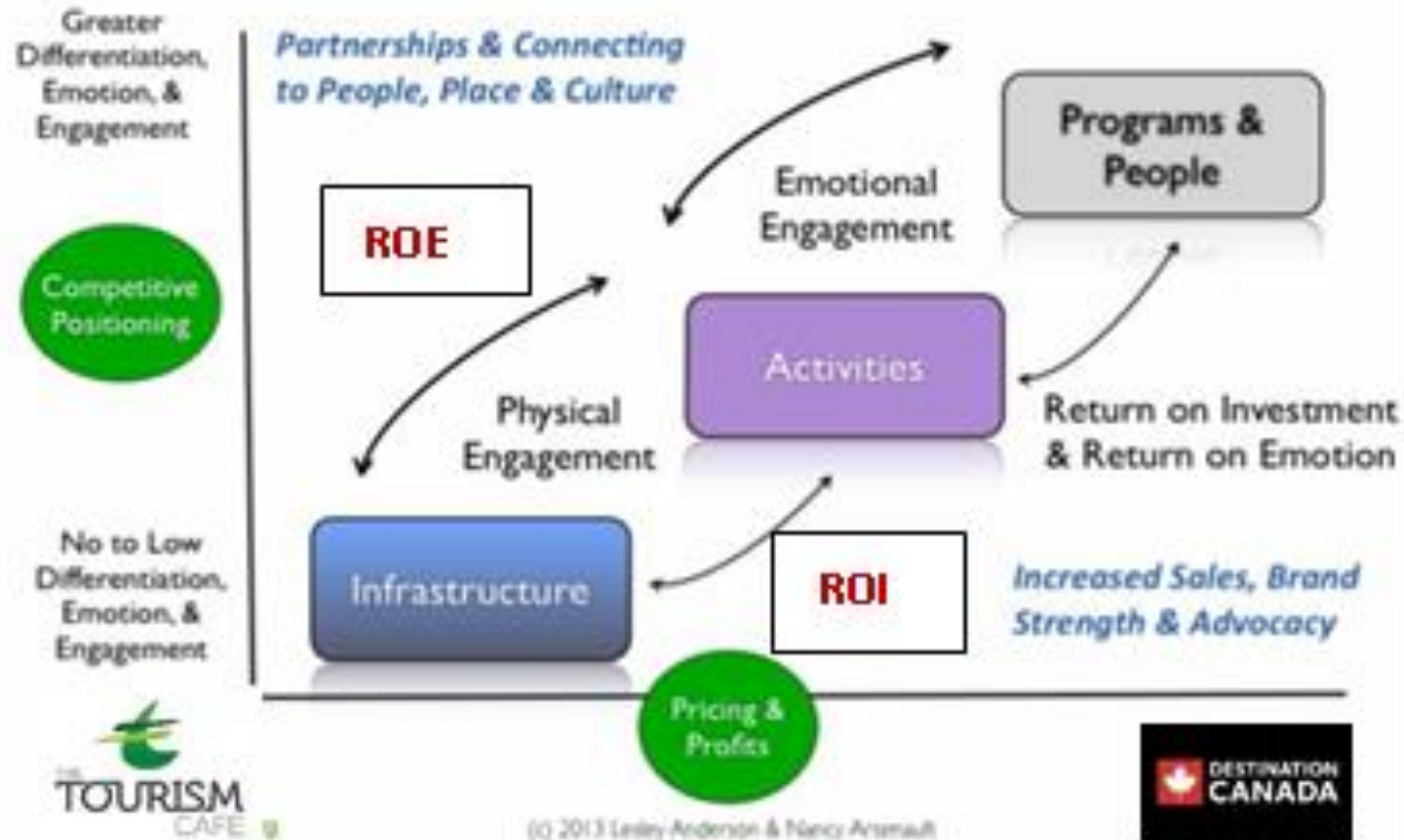
- Township facilitates the process
- Industry and residents understand/engage in community-based tourism development
- Aligns with County, Region and Provincial tourism strategies

Process

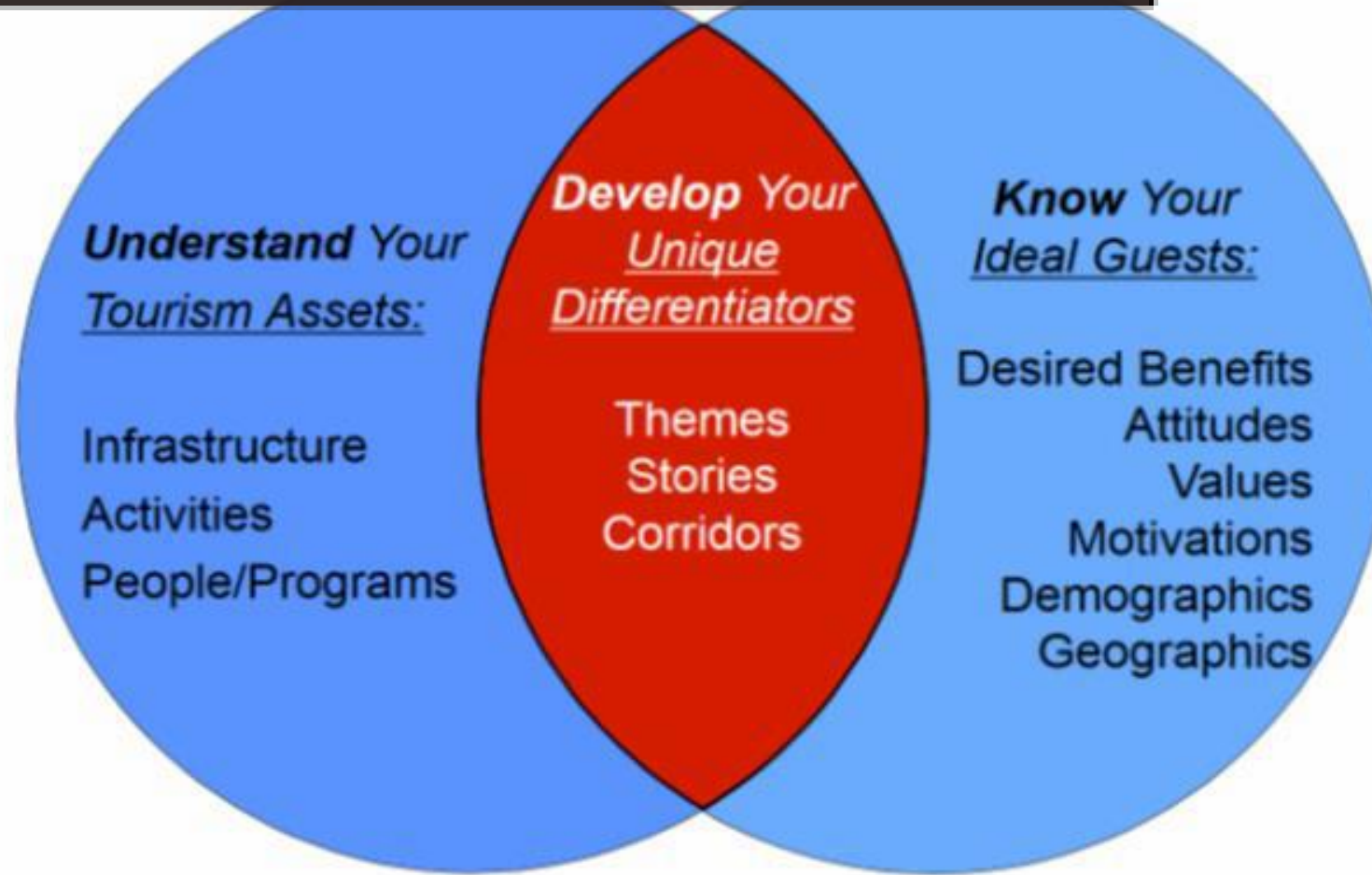
- Active participation
 - Community leaders and organizations, residents, business, governments



Benefits from Raising the Bar on Engagement, Personalization, Connections & Value



Unique Tourism Differentiator Model



Opportunity

- Grow broad-based engagement and participation
- Rally behind a regenerative tourism approach
- Tap into the passion of residents
- Leverage anchor sites, heritage and outdoor experiences
- Mobilize collective effort and energy



Working Group

- Working Group supports the project and advances its activities and efforts within the community
- Members are respected tourism and community leaders, have a community-wide perspective, and can envision what tourism development can do for the community
- Seeking a few more members
 - Application process
 - If interested, let Dana or Annette know

Process

1. Start-Up, Site Visit #1, Research

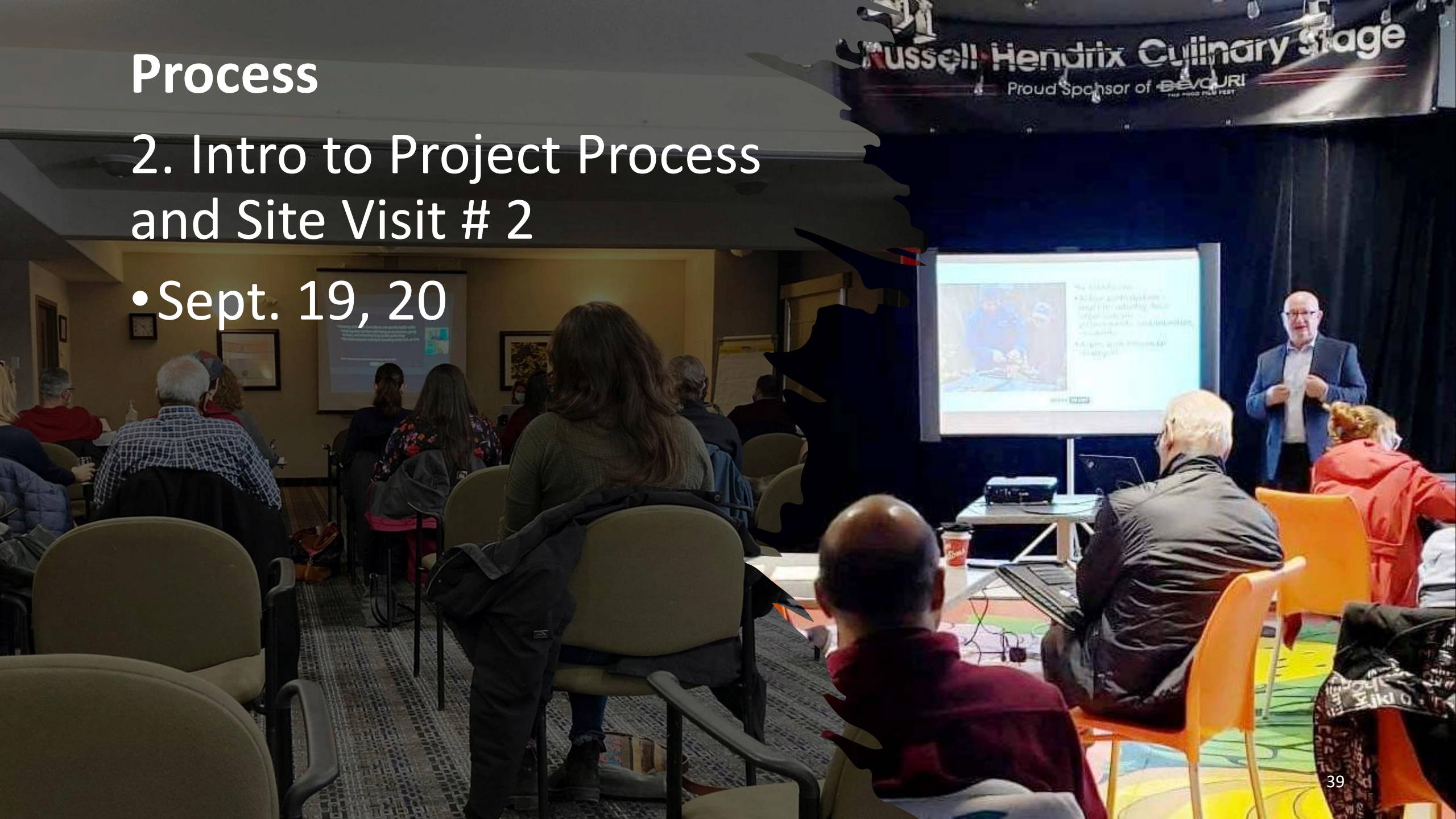
- Client Briefing, Site Visit
- Formation of Working Group and Chairs
- Gathering Evidence; Reports/Plans/Studies
- Desk-based Online Assessment
 - High-Level Tourism Inventory



Process

2. Intro to Project Process and Site Visit # 2

- Sept. 19, 20



Process

3. Visioning - Community Coffee Sessions

- Update the Working Group
- Visioning, Benchmarking, Idea Generation Coffee Sessions (3)
- Discuss a Bonnechere Valley Vision
- Benchmark market-readiness
- Identify potential development opportunities



Process

4. DRAFT Plan Presentation, Capacity Building

- Present DRAFT plan to staff and working group to secure feedback/validation (virtual)
- Present revised DRAFT plan to stakeholders and secure feedback/validation (in person)
- Deliver Experiential Tourism workshop (or other)
- **Final Plan Delivery – Dec 16**

Process

1. Start-Up, Site Visit #1, Research
2. Intro to Project Process and Site Visit # 2 – Sept 19, 20
3. Visioning - Community Coffee Sessions – Oct 28 (TBC)
4. DRAFT Plan Presentation, Capacity Building – Nov 25 (TBC)
5. Final Plan Delivery – Dec 16



BRAIN TRUST

A Meeting of Minds

www.braintrustmarketing.ca