

Premier-ranked Tourist Destinations Project – Research Report

Belleville & Quinte West

Prepared by:

BRAIN TRUST

MARKETING & COMMUNICATIONS

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PROJECT FACILITATED BY:



EXECUTIVE SUMMARY

The Belleville and Quinte West Premier-ranked Tourist Destination Framework (PRTD) project was an initiative facilitated by the cities of Belleville and Quinte West in partnership with the County of Hastings, Ontario Ministry of Tourism and Culture and Ministry of Training, Colleges & Universities (MTCU).

The PRTD process was developed by the Ontario Ministry of Tourism and Culture to provide a means for tourism destinations to define their competitive position within the tourism marketplace. Being premier-ranked is not a formal tourism destination, but rather an internal goal to help destinations become “better than the rest.”

Why Belleville and Quinte West?

There is a strong desire by the tourism industry and political representatives of Belleville and Quinte West to improve their destination and their ability to attract a greater number of visitors on a year-round basis. With the recent focus on tourism development in neighbouring municipalities, such as Northumberland and Prince Edward County, there is an opportunity for increased exposure to national and international markets.

Tourism to Hastings County as a whole is a vital component of the local economy. In 2007, the county attracted a total of 1,587,000 visitors. Total spending was \$206,991,000, which generated \$133,169,000 in direct, indirect and induced contributions to gross domestic product (GDP), \$80,026,000 in labour income and salaries, and 2,339 part-time, full-time and seasonal jobs. Total taxes generated as a result of visitor spending in Hastings County totalled \$76,214,000, including \$5,169,000 in municipal taxes.

The Three Dimensions of Tourism Assessments

1. The Product Dimension

This dimension is achieved by a destination that provides a high quality tourist experience, enabled through the following offerings:

- Distinctive Core Attraction
- Quality and Critical Mass
- Satisfaction and Value
- Accessibility
- Accommodations Base

2. The Performance Dimension

The performance dimension looks at the destination’s success in providing a quality tourist experience. This is validated by examining:

- Visitation
- Occupancy and Yield
- Critical Acclaim

3. The Futurity Dimension

Sustainable tourism is vital to any destination. In this dimension, the process looks at the destination's ability to thrive from tourism into the future and its sustainability through:

- Destination Marketing
- Product Renewal
- Managing with Carrying Capacities

The process involves several critical steps along with a serious commitment and investment of time by industry partners. This investment of time and energy is rewarded with specific insights and direction.

The PRTD Process

The PRTD process was designed to guide the industry through several key steps including database design and collection, evaluation, interpretation and planning.

- A database of “potential” tourism businesses was created and 266 surveys were delivered to companies representing the accommodation, food & beverage, attraction, retail, tour & excursion, agri-tourism, adventure provider & outfitter, festival & event, golf course, marina, and park & trail sectors.
- 72 surveys were completed, representing a response rate of 27%.
- Secondary research was also gathered and used to help shape the current picture of the destination.
- The survey data and secondary research were accumulated, entered, clarified, analyzed and evaluated using the PRTD workbook and the Tourism Resource Opportunity Matrix.

What did the process determine?

Among other things the evaluation process identified a set of Core and Supporting Attractors.

Core Attractors are:

- Outdoor Recreation (land and water based)
- National Air Force Museum of Canada

Supporting Attractors are:

- Empire Theatre & Centre for Performing Arts
- Festivals and Events
- Prince Edward County

The process shed light on other areas relating to Belleville and Quinte West's tourism assets:

- Products and experiences have both “mass” and “niche” appeal.
- While core attractors offer collective appeal, there are other destinations that offer similar products and experiences.
- Attractors do not appeal to visitors beyond Ontario's border or the international market.
- Most core and supporting attractors are available on a year-round basis; however they do not typically generate visitation for periods greater than 24 hours.
- Belleville and Quinte West offer a variety of cultural and entertainment experiences and feature well known performers and artists.
- The destination offers a selection of dining experiences, however is lacking fine dining establishments. Very few restaurants have recognition outside the area or feature well known accredited chefs.

- There are a variety of modes of travel available to reach the destination.
- Belleville and Quinte West are in the enviable position of being only hours away from two major urban centres and US border crossings.
- The destination offers a wide range of accommodations, including 1131 roofed guest rooms and 574 camp available sites at a variety of price points.
- Commercial accommodation occupancy in 2008 for Hastings County (including Belleville and Quinte West) was 49.9% - well below the provincial average of 61.5%. The average daily rate was \$115.76, compared to the provincial average of \$127.12.
- The average expenditure for guests on day trips in Hastings County in 2008 was \$113, compared to a provincial average of \$175. The average expenditure per capita for overnight trips was \$133, while the provincial average rested at \$310.
- The destination is not considered a “must see/must do” destination and has only a handful of experiences that have been ranked as “Number 1”, “Best in Class” or “Top Tier”.
- The Bay of Quinte Tourist Council has emerged as the primary Destination Marketing Organization (DMO).
- The DMO does not have sufficient funding to effectively target potential markets. Their current marketing blitz is focused on only one market – the greater Ottawa area.
- While customer service training is viewed as important, no region-wide initiatives are in place.
- Tourism operators reported that they invested over \$9 million over the past two years to improve their facilities and/or services. The most significant investment was made by the National Air Force Museum who spent over \$4 million on a building expansion project. A further 27 percent of survey respondents indicated they planned to modify or expand their operations in the next three years.
- Eighty percent of businesses feel there is a sufficient pool of labour to meet their staffing requirements to accommodate current and projected levels of visitation. *(Based on survey results)*
- Managing the carrying capacities of the natural systems that sustain local ecosystems and quality of life are understood and closely monitored.
- Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented.

Recommendations

As a result of the work completed, a series of recommendations have been developed and validated with the industry-led PRTD Champions Committee. When implemented, they will begin to take Belleville and Quinte West to the next level as competitive tourist destinations:

Recommendation #1

Identify an organization to lead destination development

- Currently several are involved in tourism but no one organization is leading
- Consider empowering Bay of Quinte Tourist Council to assume a leadership role in marketing initiatives.
- Both cities must remain at the table to drive destination development in partnership with an industry led council.

Recommendation #2

Take steps to fully engage the tourism industry in destination development

- A core group of operators are interested, however there is limited broad-based understanding and engagement
- Use the results of the PRTD process to “rally the industry”
- The Council in partnership with the cities must take a lead role in educating the industry in the upside opportunities

Recommendation #3

Prepare a Belleville/Quinte West Tourism Destination Development Action Plan

- This becomes the road map for future destination development
- Prioritizes PRTD recommendations and paints a clear picture for implementation
- Once a plan is developed, fund a locally based facilitator whose focus is solely on destination development
- Tap into new Regional Tourism Organization for development dollars

Recommendation #4

Deliver industry-wide tourism training for owner operators, front line staff

- Service and hospitality training
- Tourist market readiness
- Tourism packaging workshops
- New media/Internet
- Tourism experience development workshops
- Utilize the services of the Ministry of Tourism and Culture to facilitate some training
- Engage Chambers to facilitate training

Recommendation #5

Build future tourism growth around these attractors – National Air Force Museum of Canada, Empire Theatre & Centre for Performing Arts

- There are primary reasons to visit
- They offer incremental tourism potential
- They are year-round tourism experiences
- There is a market for these experiences
- Each presents opportunities for packaging

Recommendation #6

Focus long-term tourism destination development of the Belleville Multi-Plex (sports tourism), Quinte West Marina, and Quinte Exhibition and Raceway expansion

- Each represents a significant opportunity to drive future tourism growth – two are year-round tourism opportunities
- Each facilitates natural tourism spin-offs – accommodations, retail, F&B
- Each is a “must do” tourism initiative

Recommendation #7

Develop an annual Marketing Plan

- Build on past and current marketing activities
- Internet and new media should be the logical choice for all promotional initiatives
- Call to action is new Bay of Quinte Tourist Council website: www.bayofquintecountry.com
- Create packaged experiences for core attractors that can be purchased on-line
- Develop plans in partnership with Prince Edward County and others in Region 9

PREMIER-RANKED TOURIST DESTINATION BACKGROUND

The Premier-ranked Tourist Destination (PRTD) project was an initiative developed by the Ontario Ministry of Tourism in 2001. The goal of the PRTD program is to help destinations across Ontario identify areas for development related to tourism, assess their competitive tourism advantage, and ultimately improve to become a destination of choice.

Being a Premier-ranked destination indicates that “here is a place more attractive than the rest,” a place the potential tourist should consider first in making travel plans. To be clear, Premier-ranked is not a formal tourism designation, but rather an internal tourism goal for a destination to work towards as it relates to becoming “better than the rest”.

To assist municipalities with assessing and developing their tourism product, the Ministry of Tourism established a tool called the PRTD Framework. This framework assists jurisdictions in assessing their tourist assets, attractions, and amenities and allows them to identify opportunities in tourism development. The Ministry of Tourism provides financial assistance to regions that successfully apply to undertake the PRTD process.

Many regions and cities in Ontario have completed PRTD projects, including the Regional Municipalities of Halton, Niagara, York, Prince Edward County, Muskoka, Peterborough and the Kawarthas, Hastings County and Durham. The cities of Mississauga, Hamilton, Cornwall, Brockville, Kingston, Gananoque, and Toronto have also completed their PRTD assessments. Most have used the results of their studies in the development of comprehensive tourism product development plans.

The Belleville/ Quinte West PRTD project was an initiative endorsed by the cities of Belleville and Quinte West and facilitated by the Hastings County Planning & Development Department, the Ontario Ministry of Tourism and Culture, Ontario Ministry of Training, Colleges & Universities (MTCU), and tourism industry stakeholders. The funding for the project came from MTCU, the Government of Canada, and the Ontario Ministry of Tourism.

The successful implementation of the recommendations shall be based on a thorough understanding, appreciation, engagement, and endorsement from both the private and public sector partners. This is not an initiative of government, at any level. It is a shared process undertaken by industry and government and both must accept the accountability for delivery if it is to be viewed as productive over the long term.

Through funding from MTCU, contract staff was hired to assist in the development and completion of the PRTD resource audit. The resource audit was carried out in the form of a detailed survey of establishments in Belleville and Quinte West and asked respondents to describe their operations, services offered, customer base, and tourism awareness.

The survey was mailed to establishments from: accommodations, food and beverage, attractions, arts and culture, outdoor recreation, events, planning, heritage, and retail sectors. Survey results were compiled in a comprehensive database maintained by the Audit Team.

The tourism consulting firm BRAIN TRUST Marketing & Communications was retained in 2009 to assist with the introduction of the program to industry, to provide analysis of the audit results, and to prepare the final report. A Community Champions Committee was formed by industry leaders and stakeholders in the tourism business in Belleville and Quinte West.

The consultant worked with the Belleville and Quinte West Economic Development staff, PRTD project team, and the PRTD Community Champions to review the results, assess current industry strengths, weaknesses, attributes, product/service gaps, factors and conditions that impact existing and future development plans, and identify potential opportunities and partnerships within the tourism industry. Based on feedback, comments, and validation from the Community Champions Committee, recommendations for inclusion in the final report were developed.

PROJECT TIMELINE

August 2009	Ontario Ministry of Training Colleges and Universities (MTCU) and Ministry of Tourism agree to fund the PRTD initiative
September 2009	Project staff hired and team begins building a database of tourist stakeholders and preparing surveys
October 8, 2009	PRTD team holds a consultation meeting with Northumberland PRTD team.
October 22, 2009	Tourism stakeholders, Project Consultant, Project Supervisor, and PRTD team meet in Madoc and Community Champions are recruited
November 9, 2009	Meeting with project consultant and YLM staff to review survey design and develop advertising plan
November 27, 2009	Richard Innes of BRAIN TRUST Marketing & Communications officially begins work as the PRTD Project Consultant
November 2009	Belleville and Quinte West give approval to join PRTD project
December 7, 2009	Tourism stakeholders, Project Consultant, and PRTD team meet in Quinte West and Community Champions are recruited
February, 2009	Core and sector surveys are mailed out to BV/QW businesses & organizations
Feb. 2010 – Mar. 2010	Completed surveys are returned and data is entered into the project database
Mar. 2010 – Apr. 2010	Final survey collection and Resource Audit and Opportunity Matrix data collection is completed
March, 2010	Project Consultant analyses the survey results, measures and receives input from the Project Supervisor and PRTD team
April 1, 2010	Community Champions Committee meeting is held in Belleville to provide a project status update, review the initial findings, and gather feedback and validation for work done to date
May, 2010	PRTD team and project consultant complete workbook and draft final report and recommendations
June 9, 2010	Project Consultant presents draft recommendations to industry for validation and endorsement at Community Champions Committee meeting
July, 2010	Quinte West Economic Development Committee endorses findings and recommendations
July, 2010	Belleville City Council receives report and endorses recommendations

PURPOSE OF PRTD FRAMEWORK IN BELLEVILLE/QUINTE WEST

The PRTD framework process allows the cities of Belleville and Quinte West to analyze base data, benchmark areas of improvement for the future, and work more collaboratively towards a visitor/customer-first philosophy in destination development and in attracting and retaining tourists to its community.

By undertaking the PRTD framework, the leaders in Belleville and Quinte West's tourism industry are indicating a desire to move their destination to the next level. The process will provide industry with an accurate assessment of the destination's strengths and deficiencies and, more importantly, a clear plan for tourism development and improvement. The project will also help to:

- Improve stakeholder cooperation, mutual trust, improve communication, coordination, and partnerships among communities in our region.
- Research and develop a reliable information database to support future priorities.
- Educate and inform the industry regarding the range of attractions in the region, develop a pride and knowledge about the region among all stakeholders, enable mutual promotion across the region, and develop marketing packages (e.g. interest-specific activity packages to encourage tourists to stay longer and spend more).
- Attract increased tourism-related investment to the region, increase accommodation availability and variety, and expand and improve attractions.
- Attract greater government funding, acknowledgement, and support for increased tourism promotion effort and brand awareness.
- Improve communication of Belleville and Quinte West's brands – an important effort being to better define what the cities have to offer and where they are located.

It sheds light on development, infrastructure, training, and investment needs. The process defines the destination's strengths and product clusters and identifies our major trip motivators and markets, as well as opportunities to work collectively with all those involved in tourism.

The process in itself was deemed to be an opportunity to foster greater communication, networking, and industry relations within the tourism industry, business community, and various levels of government.

BELLEVILLE COMMUNITY PROFILE

With a population of just under 49,000, Belleville is ideally situated between Toronto and Montreal, and less than one hour away from the US border.

The city rests on the shores of the Bay of Quinte, a world class sport fishing destination, and features all the amenities of a large urban centre – including a sizeable retail mall, quaint downtown core, and the area’s largest hospital.

Belleville offers an abundance of water and land-based recreational opportunities, such as: an extensive park system, conservation areas, more than 13 km of hiking and cycling trails, three marinas, year-round fishing derbies, and award-winning golf courses, to name a few.

Thanks to a thriving arts community, there are a plethora of cultural opportunities available, leading the way is the Empire Theatre Performing Arts Centre. Symphony, ballet, live theatre and concerts events are just a sampling of what you’ll find in Belleville.

Total Population (2006)	48,821	
Population change (2001 - 2006)	2,792+	
Total Private Dwellings	20,490	
Median Employment Income (2006)	\$48,567	
Age Structure	0-14	8,005
	15-24	6,725
	25-39	8,455
	40-64	16,780
	65 and over	8,860

Source: Belleville Community Profile

QUINTE WEST COMMUNITY PROFILE

Positioned along the picturesque Bay of Quinte and the gateway to the historic Trent Severn Waterway, the City of Quinte West is a paradise to boaters and anglers.

Formed through an amalgamation of the former municipalities of Trenton, Frankford, Sidney and Murray, Quinte West offers a pleasing mix of urban amenities and relaxing rural settings. Recreational opportunities include: Batawa Ski Hill, numerous public golf courses, conservation areas, parks, two marinas, splash pads, festivals and events throughout the year, skateboard park, and ample sport fishing locations.

Quinte West is home to the largest and busiest air force wing in Canada, as well as the National Air Force Museum.

Total Population (2006)	42,697	
Population change (2001 - 2006)	1,331+	
Total Private Dwellings	17,612	
Median Employment Income (2006)	\$55,564	
Age Structure	0-14	7,850
	15-24	5,460
	25-39	7,225
	40-64	15,745
	65 and over	6,410

Source: Quinte West Community Profile

PRTD FRAMEWORK OVERVIEW

The Premier-ranked Tourist Destination framework was developed by the Ontario Ministry of Tourism to provide a framework for tourism destinations across Ontario to define their competitive position within the tourism marketplace.

The Ministry of Tourism developed a resource audit and workbook format that outlines the attributes/factors/conditions that are considered prerequisites for a tourist destination to be considered serious in building the economic well-being of its destination. Meeting these requirements is essential in order to grow tourism revenues for the destination and its tourism shareholders.

The workbook format provides a simple methodology that communities can follow to ensure consistency, accuracy, and maximum involvement of the key tourism and economic development stakeholders in the process. The workbook's emphasis is on enabling any tourist destination to operate at the highest possible level it can achieve – not necessarily in competition with other operators, but in a complementary context within that particular destination.

It should be noted that being Premier-ranked is *not* an official designation or grading. It is simply a process designed to help destinations improve in their viability and competitiveness as a place visitors want to visit.

The PRTD framework is completed using a workbook that asks specific questions about the destination using a simple methodology. Completion of the workbook is done by sourcing all possible relevant tourism statistics and information. The sources of this information include, but are not limited to, the Ministry of Tourism data and various regional reports along with information gathered by the destinations' research team in a detailed resource audit.

The workbook serves as a manual that:

- Captures the attributes/factors/conditions considered necessary for a tourist destination to be perceived as a Premier-ranked Tourist Destination
- Identifies weaknesses and gaps that must be addressed
- Identifies strengths and opportunities that might be used to create sustainable competitive advantage
- Provides a focus for building an expanded network of tourism stakeholders with consensus on future priorities for action

The *Resource Audit* is made up of four components:

- i. Conducting a Tourism Industry Survey: This component of the framework allows a destination to engage the tourism industry stakeholders and to acquire a snapshot of their current product and performance and provide an opportunity to examine in depth their future development plans
- ii. Completion of the Tourism Resource/Opportunity Matrix: The opportunity matrix looks at 123 opportunities in the areas of:
 - a. Water-based Recreation Opportunities
 - b. Land-based Recreation Opportunities
 - c. Land and Water-based Opportunities
 - d. Natural Resource Opportunities
 - e. Cultural and Heritage Resource Opportunities
 - f. Built Recreation/Commercial Infrastructure
 - g. Travel Trade Resources Checklist
 - h. Transportation Resources Checklist

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

THE PRODUCT DIMENSION:

Premier-ranked Tourist Destinations provide a high quality tourist experience enabled through the destinations' offerings of:

- i. Distinctive Core Attractors
- ii. Quality and Critical Mass
- iii. Satisfaction and Value
- iv. Accessibility
- v. Accommodation Base

THE PERFORMANCE DIMENSION:

The quality of the tourist experience and the destination's success in providing it is validated by:

- vi. Visitation
- vii. Occupancy and Yield
- viii. Critical Acclaim

THE FUTURITY DIMENSION:

The quality of the tourist experience and the destination's success is sustained by:

- ix. Destination Marketing
- x. Product Renewal
- xi. Managing within Carrying Capacities

Each of the elements A – K is further supported by criteria and performance measures.

The PRTD framework is designed to guide a research team through a three stage process of evaluation, interpretation, and planning. These stages and their respective steps are:

EVALUATION

- Step 1: Complete the Resource Audit
- Step 2: Measure Destination Product
- Step 3: Measure Destination Performance
- Step 4: Measure Destination Futurity

INTERPRETATION

- Step 5: Complete the destination performance summary
- Step 6: Determine whether the destination is among the Premier-ranked

PLANNING

- Step 7: Determine the next steps in tourism development for the destination

EVALUATION

Belleville and Quinte West’s performance is assessed by a series of measures specific to the Product, Performance, and Futurity dimensions of the destination. The first part of the measure is in the form of a statement, found in the PRTD framework criteria, with an implicit question asking whether you can affirm the statement as *True (YES)*, *Almost True (ALMOST)*, or *Not Yet True (NO)* for the destination.

The second part asks for the facts that substantiate the answer. The responses to the questions are recorded with a check mark in the appropriate box on the work page and then transferred to the Performance Summary Form provided in the PRTD framework.

The Performance Summary Form (Appendix C) displays the logical structure of the framework. Being a Premier-ranked Tourist Destination requires success across the Product, Performance, and Futurity dimensions. As illustrated below, each dimension is supported by Elements, denoted by the letters A through K. Each element has a series of consecutively numbered Criteria – A-1, A-2, etc. Each criterion is supported by Measures, denoted by lower case roman numerals.

As an example, the Product dimension’s element A – Distinctive Core Attractions has two criteria: A-1 and A-2. The first criterion, A-1, has ten measures and the second criterion, A-2, has five measures.

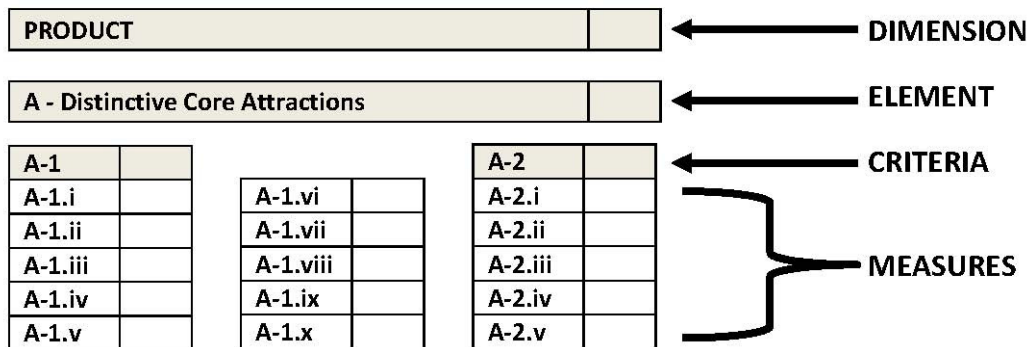


Figure 1: Performance Summary Example

Tourism Industry Survey:

Using the internet, phone book, and tourism publications as a resource for identifying target survey recipients, industry surveys were sent out to 266 businesses and organizations involved in providing tourism products, services, or experiences to visitors. All recipients received a core survey and at least one of the 12 additional sector surveys, depending on the nature of the business or organization. The sector surveys included specific questions aimed at the particular sectors, which are as follows:

- | | | | |
|------|--|-------|----------------------|
| i. | Accommodations | vii. | Golf |
| ii. | Adventure Providers/Outfitters | viii. | Marinas |
| iii. | Agri-Tourism | ix. | Parks and Trails |
| iv. | Attractions (Cultural, Historic, Natural, Sports, etc) | x. | Retail |
| v. | Festivals and Events | xi. | Tours and Excursions |
| vi. | Food and Beverage | xii. | Rocks and Minerals |

Seventy-two of the 266 businesses and organizations responded by completing their surveys, which represents a 27% response rate. The following charts indicate the response rate by sector and the percentage of responses by sector. It must be noted that in some instances, businesses received and completed more than one sector survey because of the nature of their operation. For example, a resort with a gift shop, restaurant, and marina would have received four sector surveys (accommodations, retail, food and beverage, and marina).

Sector	Distributed	Completed	Response Rate
Total Core Surveys	266	71	26%
Accommodations	46	17	37%
Adventure Providers/Outfitters	8	3	37%
Agri-tourism	17	1	5%
Attractions	43	6	14%
Festivals and Events	35	14	40%
Food and Beverage	51	11	21%
Golf	8	3	37%
Marinas	6	3	50%
Parks and Trails	10	7	70%
Retail	77	15	19%
Tours and Excursions	5	2	40%
Rocks and Minerals	1	1	100%
Skiing	1	1	100%

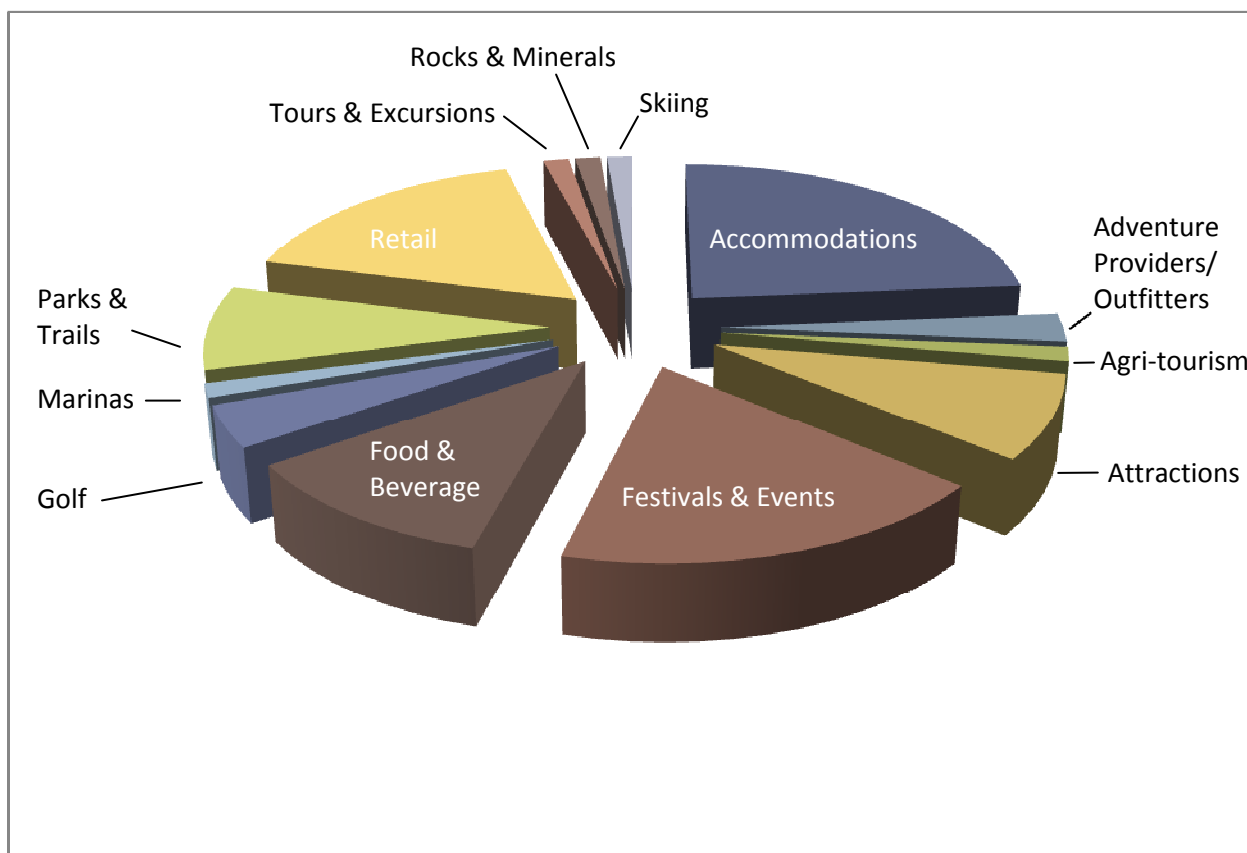


Figure 1: Survey Respondents' Primary Business

Tourism Resources/Opportunity Matrix:

The matrix is used in several ways:

- ✓ As a tool to guide consideration of a tourist destination area’s asset base, the resources contributing to its current market penetration, and ultimately, the geographic markets from which it is reasonable to expect future visitation to occur.
- ✓ As an aid to identifying product gaps and opportunities for future product development.
- ✓ As a summary reporting form.

The *Transportation and Travel Trade Resources Checklists* were completed by the PRTD project team using information gathered from local sources. The checklists can be found in Appendix A and Appendix B, respectively.

EVALUATION

PRODUCT

The PRODUCT elements, criteria and measures address the features that enable a destination to offer a high quality tourist experience.

A *DISTINCTIVE CORE ATTRACTORS*

The Distinctive Core Attractions criteria and measures assess:

1. What it is about Belleville/Quinte West that makes it stand out as distinct in the marketplace;
2. How Belleville/Quinte West 's attractions are distinguished; and
3. How Belleville/Quinte West's offerings are relevant to market wants.

A-1: The destination offers distinctive core attractions which are linked to its physical and/or history.

	Measure	Yes	Almost	No
i	A Resource Audit has been completed.	✓		
ii	The Audit distinguishes between core and supporting attractions.	✓		
iii	The core attractions motivate tourist travel to the destination ✓On their own <i>and</i> ✓As part of a regional complex.		✓	
iv	Opportunities to build on complimentary tourism attractions and/or activities with nearby destinations have been assessed.			✓
v	The core attractions are linked to the physical setting of the destination.	✓		
vi	The core attractions are linked to the history of the destination.	✓		
vii	Other Ontario destinations with competitive or similar offerings have been identified.	✓		
viii	The destination is considered to stand out as distinct from its competition.		✓	
ix	The destination's offering is superior because it offers a better guest experience.			✓
x	The destination has a product positioning statement.	✓		

Belleville/Quinte West' **Core Attractions** are (no particular order of importance)

- Outdoor Recreation Cluster
- National Air Force Museum of Canada

Outdoor Recreation Cluster

The Beautiful Bay of Quinte:

The Bay of Quinte is a long thin body of water shaped like the letter “z” on the northern shore of Lake Ontario.

The northern side of the bay is defined by Ontario's mainland, while the southern side follows the shore of the Prince Edward County headland.

The Bay of Quinte has three distinct parts:

- Upper Bay – beginning at the Murray Canal and extending east past Quinte West (formerly Trenton) near the outflow of Trent River to Deseronto and down through Long Reach, a 40 km stretch;
- Middle Bay – for 20 km between the upstream end of Long Reach and the restriction at Glenora, including Picton Bay and Hay Bay; and
- Lower Bay – from the restriction at Glenora and Picton east 25 km to Adolphus Reach, comprising the North Channel outlet to Lake Ontario at the eastern tip of Amherst Island

The Bay of Quinte is linked to larger bodies of water via the Murray Canal (Lake Ontario) and Trent-Severn Waterway (Georgian Bay). Its watershed has a diverse landscape and a wide range of physical features including wetlands, streams, forests and grasslands that provide a variety of habitats. The local topography has been sculpted by glacial retreat, melt-waters and ancient lakes that covered portions of the Great Lakes basin thousands of years ago. The shoreline of the bay contains 22 provincially significant wetlands.

Travel the Trent:

The former town of Trenton, in the heart of Quinte West, is considered the “gateway” to the Trent-Severn Waterway. The waterway begins there and extends in a north-westerly direction to Port Severn where the Severn River flows into Georgian Bay.

The overall length of the system is 240 miles (386 km) and features 44 locks, including the two highest liftlocks in the world, two flight locks and one marine railway. It took 87 years to complete, from 1833, when the first lock was constructed, until the final leg of the system opened in 1920.

The Waterway is made up of a number of interconnected lakes, rivers, canals and cuts. Since many of these waters are at varying elevations, a series of locks were built to allow vessels to navigate the system from end to end. In fact, boats transiting from Lake Ontario are raised 596 feet (182m) to the summit at Balsam Lake and then descend 262 feet (80m) down to Georgian Bay.

Dubbed “One of the 500 greatest journeys in the world” by National Geographic, the Trent-Severn Waterway is managed by Parks Canada and is designated a National Historic Site of Canada. It is open for navigation between May and October and used by thousands of boaters and anglers each year.

Angling and Sport Fishing

Visitors come to the Quinte area on a year-round basis to experience sport fishing on the Bay of Quinte, Moira River and Trent- Severn Waterway. The bay serves as the spawning area for Lake Ontario’s Walleye population and is also home to perch, large and small mouth bass (averaging up to 7 pounds), carp, garpike, muskie, catfish and freshwater drum.

This experience can be appreciated by a variety of individuals, from families seeking outdoor adventure to serious anglers.

This activity is strongly supported by:

- 11 Marinas with 782 Seasonal Slips, 130 Transient Slips and 3 yacht clubs
- 10 boat launch ramps
- 5 Ice Fishing Hut Rental Services
- 17 species of fish
- 7 bait and tackle shops
- 2 Fishing Charter Services
- 2 Public Trout Fishing Preserves
- Average of 20-30 tournaments per year

Fishing Tournaments	Species	Date	Town/Village
Kiwanis Walleye World	Walleye	May 1-2	Trenton
Quinte Fishing Series	Walleye, Bass,	May 30-Sept 19	Belleville
Friends of Weller’s Bay Fishing Derby	Bass, Salmon	Sept 11	Trenton
Family Fishing Weekend	Bass, Walleye	Feb 13-15/July 3-11	Belleville
Quinte Bassmasters Tournament Series	Bass	June 27 – October 4	Belleville
Friends of Weller Bay Live Release Derby	Bass, Pike	Sept 11	Trenton

- The economic value of the Bay of Quinte’s fishery is \$24.5 million (i.e. fishing supplies, accommodations, food and beverage, fuel)
- The Bay of Quinte recreational open water angling survey was conducted in May 2006. Over 900 anglers were interviewed of which 40% were local, 52% were from Ontario (outside the local area), 8% were from the US and less than 1% was from elsewhere in Canada.
- The combined waters of the Trent Severn Waterway are the most fished in the province. The estimated 1.8 million angling days on the Trent is equivalent to the entire number of angling days in Saskatchewan.

Batawa Ski Hill

The Batawa Ski Hill was established in 1955 by a group of Bata Shoe factory employees, driven by a commitment to enhance community spirit and the sport of skiing. After obtaining permission from landowner Mr. Thomas Bata to clear some trees, they installed a homemade rope tow on one of the hills close to the shoe factory. Today, the ski hill has evolved to three lifts and seven runs with state of the art snow making and grooming.

The alpine ski hill draws its business primarily from the local area, Kingston, Northumberland County and Prince Edward County. It offers rental equipment for a nominal charge and a variety of pass options – including weekday and half day rates, weekend rates, day or night rates, and group discounts. Semi-private and private lessons are given onsite for skiers and snowboarders at every level and age.

Estimated visitation to the ski hill during their 2009/2010 season was approximately 30,000 people. They have seen an increase of 50% in business over the past three years, thanks largely to heavy investment in equipment and marketing.

Parks & Trails

Both Quinte West and Belleville offer several well groomed, easy to access trail systems.

Quinte West recently published a **Trails & Recreation Guide**, which highlights the area's 12 trails, their uses and location. Most notable are the Quinte Conservation Area, the Bleasdell Boulder trail (featuring a 2 million pound boulder left on the site by an ice age glacier), and the Lower Trent Trail, which connects to the famed Hastings Heritage Trail.

Quinte West participates in the Geocaching GPS Treasure Hunting Program, a global initiative where adventure seekers use GPS coordinates to find hidden containers. The Quinte West Chamber of Commerce rents these units free of charge.

Belleville's trails are more focused along the waterfront and include the Kiwanis-Bayshore Trail (2.57 km), the Parrott-Riverfront Trail (1.6 km) and the Riverside Park Trail (5.2 km).

Just minutes outside of the City of Belleville is the Plainfield Conservation Area and Frink Centre, which boasts a series of 14 wilderness trails and a wetland ecology boardwalk.

Combined, Quinte West and Belleville manage 896 acres of parkland. The largest, most visible ones include Centennial Park (Quinte West), Frankford Tourist Park, Zwick's Park (Belleville) and the West Riverside Park (Belleville).

Centennial Park is located along the banks of the Bay of Quinte, at the mouth of the Trent Severn Waterway. The park is home to the Duncan McDonald Community Arena, an amphitheatre, public marina, splash pad, skate park, and play equipment. There is also a paved waterfront trail that runs through the park and links to downtown Trenton. From fireworks to ice fishing, there are special events and seasonal activities that take place in the park throughout the year.

Situated on a stretch of parkland along the Trent River in downtown Frankford, the Tourist Park is the centre for regional outdoor activities and special events. The park has a sandy beach area and playground, covered picnic pavilion, and seasonal overnight camping facilities.

Zwick's Park is the location of some of Belleville's most popular events. The west side of the park hosts the annual Waterfront and Ethnic Festival in July, the Quinte Ribfest in August, Canada Day celebrations, charity walks, Easter egg hunts and outdoor concerts. It is also home to a wading pool, playground, covered picnic area, walking trails and, on the east side, a fully fenced dog park.

The West Riverside is located beside the Moira River and well known for its giant pirate ship play structure and new skateboard park. It also features picnic areas, soccer pitches, a canteen, and Belleville's floral Canadian flag display, visible from Highway 401.

Belleville and Quinte West are also within half an hour drive from three Provincial Parks – Sandbanks (Picton), North Beach (Consecon) and Presqu'île (Brighton). These sites offer swimming, fishing, wildlife viewing and, in some cases, camping.

Hitting the Links

Belleville and Quinte West offer 11 quality golf courses featuring rolling greens, breathtaking views of the bay and serene, park-like settings.

There is a course for every skill level, with many offering multiple sets of tees to accommodate anyone from pro to beginner. Most of the courses are within easy traveling distance from major highways and accommodations and regularly partner with hotels/motels in the area to create a memorable getaway for visitors.

Although some courses have won local awards (i.e. Reader's Choice), few have recognition outside of the Quinte Region. Black Bear Ridge is the exception, with an impressive list of awards from reputable golf organizations, including: Top 100 Course in Canada (SCORE Golf Magazine, 2008), 4th Best Conditioned Course in Canada (SCORE Golf Magazine, 2008), Bill Fach – Superintendent of the Year (Canadian Golf Superintendent Association, 2008), The Bogeyman's Favourite Course East of Toronto (Toronto Star, 2007), Best New Golf Course East of Toronto (Golf Digest Magazine, 2006), Best New Golf Course East of Toronto (SCORE Golf Magazine, 2006), Best New Public Course in Ontario (Fairways Magazine, 2005), Top 10 Golf Course Along 401 Corridor (Teeing It Up Ontario). Timber Ridge Golf Course, between Quinte West and Brighton was also honoured by SCORE Golf magazine as being one of the Top 100 Golf Courses in Canada in 2006.

National Air Force Museum of Canada

Founded in 1984, the National Air Force Museum of Canada attracts over 40,000 visitors annually to its location in Quinte West. The museum displays more than 3,500 artefacts and memorabilia depicting major historical events, notable aviation achievements, as well as the social history of Canada's Air Force. It houses a further 40,000 items in its collection, such as artwork, archival material, military memorabilia, medals and aircraft.

In 2005, the museum opened a new 7,000 m² display area, which is the current home of North America's only remaining Halifax Bomber. The Bomber, flown by 644 Squadron RAF (Royal Air Force), was shot down by German anti-aircraft fire during WWII while enroute to drop supplies to the Norwegian resistance. The plane was ditched in Lake Mjøsa and all but the tail gunner died from hypothermia.

The Halifax lay undisturbed under 750 feet of water until recovered in 1995 by the Halifax Aircraft Association. Airlifted to Trenton by the Canadian Forces and then restored by a talented and devoted team of volunteers, it was officially unveiled in 2005 as the most technically accurate Halifax in the world. Of the 6,178 built, only three exist today.

"In service with RAF Bomber Command, Halifax aircraft flew 82,773 operations, dropped 224,207 tons (203,397 tonnes) of bombs and lost 1,833 aircraft. In addition to bombing missions, the Halifax served as a glider tug, electronic warfare aircraft for No. 100 Group RAF and special operations such as parachuting agents and arms into occupied Europe. Halifax's were also operated by RAF Coastal Command for anti submarine warfare, reconnaissance and meteorological roles." (*Wikipedia*)

Work is currently ongoing for the restorations of a 1942 Avro Anson Mk II and a 1943 North American Harvard Mk II. Originally produced in Canada, these two vintage aircraft were instrumental in training generations of RCAF and Allied aircrew.

Adjacent to the museum is the RCAF Memorial Airpark, where aircraft enthusiasts can get a close up view of 22 historic aircraft – including the DC-3 Dakota that revolutionized air transport around the world, and the F-86 Sabre, the finest “dogfighter” of its day. This park also features more than 9,000 individual Ad Astra Memorial Stones, dedicated to the memory of those who served in Canada’s Air Force and 32 privately funded monuments celebrating various squadrons. Reunions and dedications are held annually at the Air Park.

Supporting Attractions – Empire Theatre & Centre for Performing Arts

The Empire Theatre originally opened in 1938 as the McCarthy Theatre - a venue for feature films and live performances. After the theatre closed its doors 24 years later, the building became home to one of Belleville’s most popular sports and hobby shop – Stephen’s Licence Ltd. The owner, Gerry Bongard, made little change to the interior of the historic building in hopes it would one day be used again as an entertainment hub for the community.

In March 2002, the building was purchased by Royal LePage broker Mark Rashotte who, over the past 8 years, has turned it into a 700 seat, state of the art theatre which attracts internationally known performers such as Blue Rodeo, Tragically Hip, Great Big Sea, Andy Kim, Paul Anka and Peter Frampton.

The theatre also hosts an annual outdoor summer event called Rockfest, which has featured such high profile stars as Alice Cooper, Lynyrd Skynyrd, Randy Travis, 3 Doors Down, Tom Cochrane, the Doobie Brothers, Trooper, Creedence Clearwater Revisited, Steve Winwood, and Bachman-Cummings of The Who.

Supporting Attractions – Festivals and Events

Both Belleville and Quinte West offer numerous annual and seasonal events. Most noteworthy are the Empire Rockfest (July), Belleville Waterfront and Ethnic Festival (July), Quinte Ribfest (August), Big Musicfest (June) and the Trenton Scottish Irish Festival (September). Combined, these festivals bring in an average of 80,000 people. Smaller festivals and events occurring throughout the year - including the Frankford Blues Festival (Quinte West), the Norampac Summer Concert Series (Quinte West), the Classic Country Music Reunion (Quinte West), Walleye World Live Release Fishing Derby (Quinte West), Savour – A Tasting of local food and drink (Quinte West), Christmas Fantasy of Lights (Quinte West), Frankford Riverfest Family Weekend (Quinte West), Fiddler’s On The Trent (Quinte West), Downtown Festival on the Bay (Quinte West), Savour The Chill (Belleville), Summerfest (Belleville), Art Walk (Belleville), and Porchfest (Belleville) - give visitors further opportunity to immerse themselves in the cultural offerings of these two cities.

Event	Approximate attendance (last year)	Admission
Trenton Scottish-Irish Festival	5,000	Free
Rockfest	10,000	\$39.95 - \$76.95
Waterfront and Ethnic Festival	30,000	Free
Big Music Fest	15,000	\$49.50
Quinte Ribfest	18,000	Free (\$2 parking)
Frankford Bluesfest	1,400	\$15 - \$25
Kiwanis Walleye World Fishing Weekend	4,600	\$15 - \$30

Supporting Attractions – Prince Edward County

Prince Edward County is poised to become Ontario’s next “Niagara region”. With a growing wine industry (12 wineries open to date), high calibre dining, unique shopping experiences and one of the most beautiful beaches in Ontario, Belleville and Quinte West sit on the doorstep of a tourism gem.

Despite its assets, Prince Edward County falls short on year-round roofed accommodations. With 1131 beds available, Belleville and Quinte West can easily make up for this gap and draw people into their communities. Accommodations include:

Motel/ Hotel	Beds
Ramada Hotel	140
Holiday Inn	109
Best Western	88
Comfort Inn/ Belleville	125
Comfort Inn /Trenton	80
Park Lane Motel	21
Avalon Motel	27
Clarion Suites	46
Fairfield Inn	114
Belleville Motel 5	76
Holiday Inn Express	80
Bayside Motel	14
Travel Lodge Q.W.	43
Howard Johnson	80
Park Motel	30
Guest Inn	26
Montrose Inn	4
Place Victoria Place B&B	1

Motel/ Hotel	Beds
The West Wing B & B	2
Aisling House B&B	3
Inn by the Rose Garden	3
Moira B & B	2
Spectrum House B&B	2
Heritage Charm Inn	3
Hickory House B&B	3
Twin Oakes B&B	3
Savery House B&B	3
Murray Meadows B&B	3
TOTAL BEDS	1131
Additional Resource - 8 Wing Trenton	192 Beds

Links to Attractions

Belleville and Quinte West's distinctive core attractors and supporting attractors are part of a regional complex and are linked to both the physical setting and history of the area.

The Regional complex known as the Bay of Quinte Country, includes the cities of Quinte West, Belleville, Brighton, Prince Edward County, Tyendinaga Mohawk Territory, and the Greater Napanee area. *Both cities lay on the shore of the Bay of Quinte, with Quinte West also acting as the gateway to the historic Trent Severn Waterway.*

Belleville and Quinte West are bounded by:

1. Northumberland County
2. Prince Edward County
3. Hastings County
4. Lennox and Addington County



Physical Links to Attractions:

There is a definite connection between the identified core attractions and the physical settings of the destination.

Water-based Outdoor Recreation is closely intertwined with the physical setting. If not for the fact that both Quinte West and Belleville lay next to the Bay of Quinte and Trent-Severn Waterway, fishing and boating could not take place on the scale it does now.

Ample access points through public launches and marinas, as well as a series of locks, make this waterway accessible to a variety of users. In addition, the cascading rapids found along the Moira River offer an added challenge to kayak enthusiasts.

The Bay of Quinte is a highly popular fishing spot for Walleye and has been touted by pro-anglers as the “premier trophy walleye fishery on the planet.” The Kiwanis Walleye World derby draws in approximately 5,000 people annually and is the largest fresh water sport fishing weekend in North America.

The National Air Force Museum is located at 8 Wing/CFB Trenton – Canada’s busiest air force wing. In addition to experiencing our rich air force history, visitors to the museum can also enjoy the excitement of watching some of our newest aircraft lift off from the tarmac.

Both Quinte West and Belleville are easily accessed by highway 401 and VIA Rail. They are in close proximity to major centres such as Toronto and Montreal. Both cities are also stops on the VIA train route, as well as major bus routes such as Greyhound.

Historical Links to Attractions:

The Bay of Quinte has seen many visitors to its waters since its discovery in 1615 by Samuel de Champlain. Champlain ascended the Ottawa River, crossed Lake Nipissing and descended the French River to Georgian Bay where he visited the Huron Villages. In August he set out with a war party of Hurons to attack the Iroquois. Their route was by way of Lake Simcoe, the Trent River, the Bay of Quinte and across the foot of Lake Ontario, where Champlain first laid eyes on the land now known as Quinte West.

When the United Empire Loyalists settled in this region in late 1700’s following the American Revolution, the Bay of Quinte played a crucial role in the transportation of goods and people, as well as providing a source of food to settlers. Near the 1800’s, the waterway heavily contributed region’s economic success thanks to an illustrious lumber industry and the introduction of steamer ships, which brought more visitors to its shores.

“The Queen Charlotte was the first steamer to navigate the waters of the Bay of Quinte... It was built and commenced running in 1818; its trip being from ‘The Carrying Place at the head of the Bay, not far from the location of the present Murray Canal, to Prescott, which was then as far down the St. Lawrence as navigation extended, because of the Rapids. The writer has heard from some of the people of the past generation some marvellous and interesting incidents about the Charlotte’s early trips. The days when it was known she would pass up or down, wagon loads would drive to the Bay shore from miles distant to see her plough through the waters, against wind and storm at five to seven miles an hour.” (Source: *Napanee Beaver*)

The local economy once again profited from the Bay of Quinte during Prohibition in the United States. Large volumes of booze were produced in the area, and shipped via boat on the Bay, across to Lake Ontario, and finally arriving in New York State where it was distributed. Construction on the Trent-Severn Waterway began in 1833 in the heart of the Kawarthas. Settlers, anxious for a waterway which would provide access to lucrative southern markets, pressured for the building of a small wooden lock. Construction of the waterway continued until total navigation was possible in 1920. The entire waterway opened to small boat traffic, marking the beginning of one of the province’s principal recreational waterways.

8 Wing/Canadian Forces Base Trenton officially opened in August 1931. Intended as a smaller, supporting base of Royal Canadian Air Force (RCAF) Station Borden, the location became a major centre for the British Commonwealth Air Training Plan during World War II. RCAF Trenton was host to No. 1 Fighter and No. 3 Army Cooperation Squadrons, flying Siskin and Tiger Moth aircraft.

Following the war, Trenton primarily became the home for transport aircraft and still retains its status as the hub for air transport operations in Canada and abroad.

Presently, the wing/base plays a key role in the National Search and Rescue Program, operates the Canadian Forces Land Advanced Warfare Centre and maintains several aircraft type – including the new CC-177 Globemaster, the CC-130 Hercules, the CC-150 Polaris, the CH-146 Griffon helicopter and the CC-144 Challenger. It also hosts the annual summer training camp for the Royal Canadian Air Cadets, which attracts youth from across the province.

How does Belleville/Quinte West compare to other destinations?

Belleville/Quinte West clearly offers unique experiences for tourists visiting this area. The Bay of Quinte has been identified as offering some of the best Walleye fishing in North America, while the Trent -Severn Waterway and Murray Canal allow boaters to easily access the area from Lake Ontario and Georgian Bay.

The waterfront areas for both Quinte West and Belleville are comparable to those found in nearby towns such as Cobourg and Port Hope. They offer appealing green space, amenities for boaters, parks, multi-use trails and are within walking distance of the downtown core.

It cannot be said that Belleville and Quinte West offer a better guest experience than other destinations as there is no region-wide survey program in place and local businesses do not formally keep track of customer satisfaction levels.

Although the core attractors in Quinte West and Belleville collectively offer a unique experience for tourists, there are other Ontario destinations that offer similar products and experiences.

The nearest competitive destinations and their distance from Quinte and Belleville West are:

Competitive Destinations	Distance (KM) from the City of Quinte West	Distance (KM) from the City of Belleville
Prince Edward County (Picton)	46	33
Kingston	98	82
Cobourg	53	71
Peterborough	104	122

A-2: Attractions are relevant to the expectations of identified market segments.

	Measure	Yes	Almost	No
i	The Resource Audit classifies destination resources and their appeal to Regional, Provincial, National/US and International geographic segments.	✓		
ii	Core attractions are relevant to a tourist market base.	✓		
iii	Attractions appeal to guests from beyond Ontario's borders.	✓		
iv	The market segments for which the identified attractions are expected to have a compelling appeal have been identified.	✓		
v	A core attraction, or set of complementary attractions pull visitation from all segments on a year-round basis.	✓		
vi	The core attractions are linked to the history of the destination.	✓		

Belleville and Quinte West's tourism products and experiences have both "mass" and "niche" appeal and provide visitors with a wide variety of things to do and see when visiting the two communities. Core and supporting attractors are relevant to both mass and niche markets and segments are characterized as touring families, anglers, theatre music enthusiasts, and boaters, among others.

Belleville and Quinte West have attractions and resources that appeal to a variety of market segments from a wide geographic area. Attractions appeal to guests beyond Ontario's borders.

Attraction	Appeal					
	Local	Regional	Provincial	National	U.S.	Int'l
National Air Force Museum of Canada	4%	31%	42%	15%	2%	6%
Glanmore National Historic Site	35%	20%	15%	10%	10%	5%
Kiwanis Walleye World Fishing Derby	60%	-	37.6%	1.56%	.43%	0%
Big Music Fest	80%	10%	10%	-	-	-
Trenton Scottish-Irish Festival	60%	22%	4%	4%	7%	3%
Rockfest	80%	10%	5%	6%	3%	1%
Fiddler's on the Trent	60%	20%	15%	5%	-	-

The tourist market base for the destination’s core and supporting attractors do appeal to a broad range of market segments. The Ontario Tourism Marketing Partnership Corporation (OTMPC), for the purpose of marketing, has defined the primary markets as: Upscale Adventurers, Provincial Families, Young Go-Go’s, and Retired Roamers

UPSCALE ADVENTURER
 Well-off older middle-aged married couples with adult-age children & some empty nests
Market Size: 558,366 (11.64%) ON HHs
Travel Behaviours: Golf/Ski in Ontario
 # trips in Ontario: 2,846,260
Key Behaviour (Leisure): Ballet, opera, ski, tennis, golf, casinos, sporting events.
Key Behaviour (Media): Read newspapers, internet, do not like flyers
Travel Motivations: Connection, attention to detail, aficionados, flexibility & technology.
Key Markets: Toronto, Ottawa, Mississauga, London

PROVINCIAL FAMILIES
 Well-off younger and middle-aged suburban and exurban families with lots of children
Market Size: 952,610 (19.84%) ON HHs
Travel Behaviours: Ontario family destinations
 # trips in Ontario: 4,757,604
Key Behaviour (Leisure): Outdoorsy, jet/snow skiing, skate/snowboarding, theme parks, bowling, plays, dinner, theatres.
Key Behaviour (Media): Light TV/Radio users, average internet.
Travel Motivations: Time Savers, group travel, family vacations, status
Key Markets: Brampton, Hamilton, Mississauga, London

YOUNG GO-GO’S
 Young successful, well-off multi-ethnic urban trendsetters
Market Size: 181,124 (3.78%) ON HHs
Travel Behaviours: Worldwide travel, Canada
 # trips in Ontario: 721,763
Key Behaviour (Leisure): Concerts, clubs, movies, health clubs, skiing, restaurants, hiking, camping.
Key Behaviour (Media): Heavy internet/newspapers, do not like direct mail
Travel Motivations: Flexibility & Ecology, escape, originality, attention to detail
Key Markets: Toronto, Ottawa, Hamilton, London

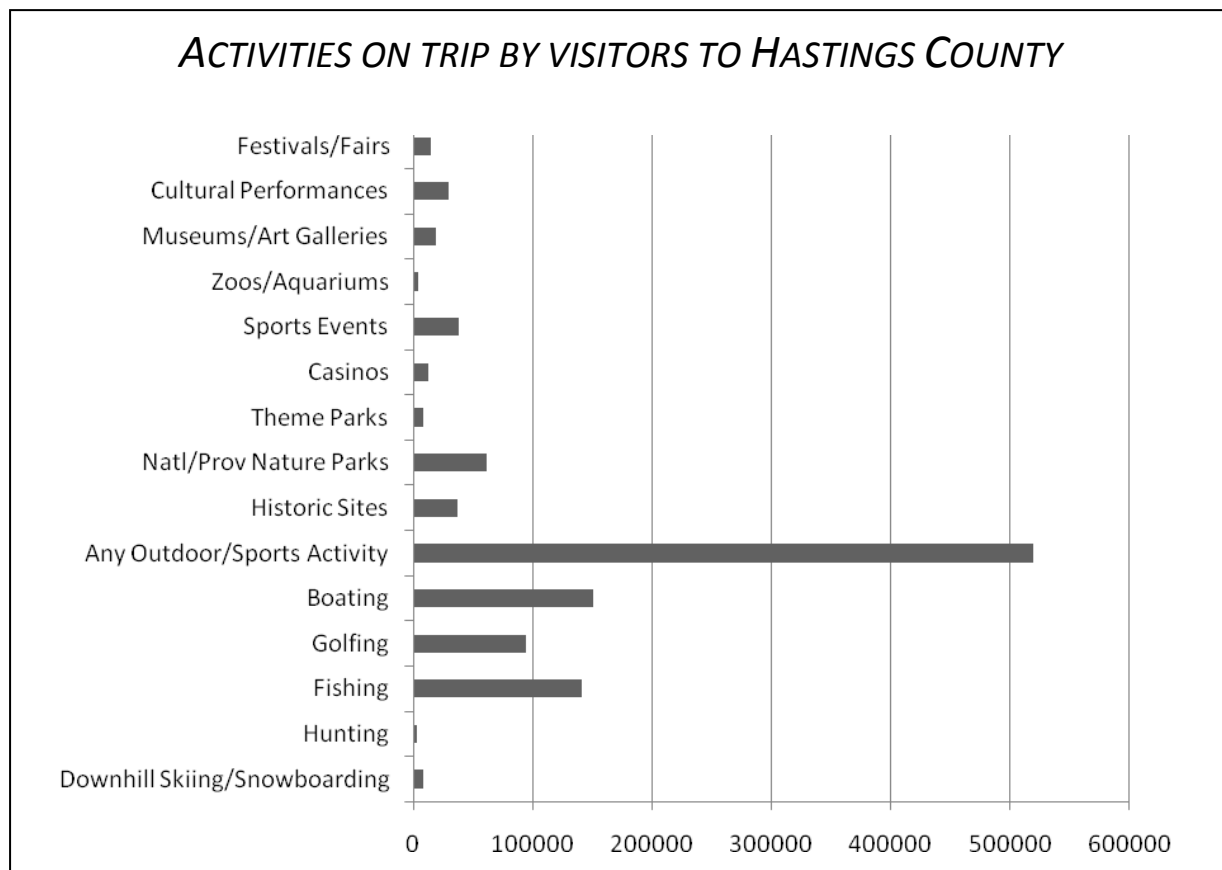
RETIRED ROAMERS
 Midscale mature and older retirees and seniors living in suburbs and towns.
Market Size: 590,162 (12.3%) ON HHs
Travel Behaviours: Mainly North America
 # trips in Ontario: 2,699,941
Key Behaviour (Leisure): Festivals, fairs, markets, RV, garden, boat shows, curling, snowmobiling, hunting, fishing
Key Behaviour (Media): Above average TV/radio/newspapers.
Travel Motivations: Nature, information, price, nationalism
Key Markets: Toronto, Hamilton, Ottawa, London

Although the destination will attract visitors from all four segments, the primary segments for which Belleville and Quinte West’s attraction have a compelling appeal are Provincial Families, Young Go-Go’s and Retired Roamers.

There are no provincial statistics for Quinte West and Belleville; however they are included in the statistics for all of Hastings County. The following markets generated the following numbers of trips in Ontario in 2007:

Tourism Market	# of trips in Ontario	# of trips in Hastings County
Museums/Art Galleries	3,651,000	19,000
Festivals/Fairs	2,510,000	15,000
Any Outdoor/Sports Activity	21,128,000	520,000
Boating	6,220,000	151,000
Fishing	4,420,000	141,000

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2007)



(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2007)

Core attractors and complimentary attractions appeal to visitors on a year round basis, with visitation reaching peak levels during the summer and fall months. Like many destinations, visitation drops noticeably in the winter months. Both cities have attempted to remedy this situation by creating more events between January and March (i.e. Belleville’s Savour the Chill), as well as marketing their areas as a four season destination.

Hastings County Visitation By Season			
Q1	Q2	Q3	Q4
247,000	291,000	610,000	378,000

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2008)

B QUALITY AND CRITICAL MASS

The Quality and Critical Mass section addresses the extent to which a destination provides a memorable experience by offering a broad and deep range of options for engaging in core and related activities, as well as entertainment, shopping, and dining.

The evaluation has assessed the size of Belleville and Quinte West’s activity and amenities base and the mass and quality of its entertainment, shopping, and dining offerings.

B-1: The destination offers a range of memorable experience-creating, core and on-theme activities sufficient to sustain interest for more than 24 hours.

	Measure	Yes	Almost	No
i	The core destination experience stands out as memorable to the visitor.		✓	
ii	The core experience is typically “consumed” over a period greater than 24 hours.		✓	
iii	A variety of on-theme activities are available to give guests a reason to stay overnight.		✓	
iv	The average length of stay at the destination is greater than 24 hours.		✓	

It can be said that core destination experiences have the potential to stand out as memorable to visitors. Belleville and Quinte West offer an array of unique activities that appeal to a broad range of interests. From the historic National Air Force Museum, to the Bay of Quinte’s water playground, to the close proximity to major urban centres such as Toronto and Montreal, the communities of Quinte West and Belleville could easily position themselves to attract more visitors to the region.

While many of the core attractions and activities that visitors consume last less than 24 hours, a combination of activities can expand visitation from less than 24 hours to at least an overnight stay. For example, if visitors attend a live performance, they will most likely spend more time dining and shopping in the downtown core. If they visit the Air Force museum, they may stop by the Glanmore National Historic Site in Belleville, tour the Trent Port Museum in Quinte West or visit the Regimental Military Museum at the Belleville Armouries.

Based on statistics for the 2007 Travel Survey of Residents of Canada (TSRC), 856,000 visitors to this region extended their stay overnight for the following reasons:

- Pleasure (52%)
- Business (3%)
- Visiting Friends and Relatives (43%)
- Personal (2%)

The core experiences and their typical duration are:

Activity	Duration
Fishing	1-2 days
Boating	1+ days
Hiking	½ – 2 days
National Air Force Museum	1-2 hours
Golfing	½ - 1 day
Skiing	1-2 days

B-2: The destination offers a range of memorable experience-creating, core and on-theme activities sufficient to sustain tourist interest on a year-round basis.

	Measure	Yes	Almost	No
i	The destination offers core activities on a year-round basis.	✓		
ii	The destination offers on-theme activities on a year-round basis.			✓

It has been validated that core activities are offered on a year-round basis, while on-theme activities are not.

B-3: Core activities are easily accessible to a variety of market segments at a variety of price points and layers of added value (i.e., richer/more expensive options for getting more out of the experience, for example: fishing from the shores of the Bay of Quinte vs. chartering a boat).

	Measure	Yes	Almost	No
i	Core and on-theme activities are easy to buy.		✓	
ii	There is a range of options and price points available for a variety of segments to engage in core or on-theme activities.	✓		

Core and supporting attractions for Quinte West and Belleville are either free or are relatively easy to buy. Tickets for many of the larger festivals/events (i.e. Rockfest, Big Music Fest) can be purchased through the internet, by phone, at local businesses or on-site. Permit fees for using the Trent-Severn are paid at the various locking stations along the waterway.

There is a range of options and price points available to engage in core or on-theme activities. These are:

Activity	Approximate Price Range
Empire Theatre	\$7 - \$45
Events	Free - \$75
Fishing	Free - \$83.25
Fishing Charter/Guide	\$225 - \$549
National Air Force Museum	Free or small donation

B-4: The destination offers a variety of activities attractive to a variety of market segments at a range of price points and layers of added value. The range extends from basic to multiple layers, including opportunities for relaxation, entertainment, learning, skills development, adventure, and new experiences.

	Measure	Yes	Almost	No
i	The destination offers a variety of activities with a range of sub-options for each.	✓		
ii	The range of activities is well promoted to and understood by guests.		✓	
iii	The range of activities is easy to purchase.	✓		
iv	Groups have cooperatively invested in programming or animating public spaces, gathering spaces, and queuing areas.		✓	

It can be said that Belleville/Quinte West offers a variety of activities with a range of sub-options. These include:

Category/Activity	Business Type	Approximate Price Range
Relaxation	Restaurants/Cafes	\$3 - \$44
	Accommodation/B&B	\$50 - \$100
	Spas	\$20 and up
Entertainment	Festivals and Events	Free - \$75
	Theatre/Music Performances	Free - \$65
	Shannonville Motorsport Park	\$5 - \$15
Interpretation	Gallery ArtPlus	Free
	John M. Parrott Art Gallery	Free

Education	National Air Force Museum	Free/Donation
	HR Frink Centre	\$2 - \$10
Cultural/Historical Understanding	Glanmore National Historic Site	\$3.50 - \$6
Skills Development	Golf Lessons	\$35 - \$130
	Art Lessons (Stockdale Mills)	\$0-\$240
Outdoor Adventure	Trails	Free
	Belleville Skateboard Park	Free

The range of activities is almost well promoted to and understood by guests. Bay of Quinte Tourist Council launched a new website in April 2010, which provided excellent insight regarding what the region has to offer. Profiles are given on the participating municipalities – including Belleville and Quinte West.

Publications	Number of Copies / Views / Shows
Bay of Quinte Country Website	5,000 hits in first month
Quinte West Discovery Guide	40,000
Quinte West Trails & Recreation Guide	10,000
Angler's Adventure Map	15,000
Quinte West Map	20,000
Quinte West Brochure	40,000
City of Belleville Guide Book	20,000

The range of activities is relatively easy to buy. Many of the attractions are free admission, while others can be purchased on site. Theatre, musical performances and accommodations can be purchased in advance via the internet and telephone.

Both cities have made an effort to animate their public spaces through activities such as farmer markets, Christmas light displays, Santa's Palace, horse drawn carriage rides, sidewalk sales, ice carvings, and public concerts. To further enhance interest in the downtown areas, Belleville and Quinte West could consider incorporating buskers, outdoor art exhibits, restaurant patios and outdoor theatres during the warmer months.

B-5: The destination offers cultural experiences and entertainment options from basic venues/shows/events credible at regional to larger scales, over a range of price points.

	Measure	Yes	Almost	No
i	The destination offers a range of cultural experiences and entertainment options.	✓		
ii	Events or venues in the last two years included performances by artists with name recognition beyond the local region.	✓		

The destination does offer a range of cultural experiences and entertainment options. These include:

Activity	Approximate Price Range
Pinnacle Playhouse (Live Theatre)	\$18 - \$70
Quinte Symphony	\$5 - \$30
Quinte Ballet School Performance (2x/yr)	0 - \$25
QAC Community Show and Sale	Free
Gallery One-Twenty-One	Free
Quinte Film Alternative	\$9.50 - \$60
Galaxy Theatre	\$7.50 - \$10.50
Centre Theatre	\$5 - \$9.50
Hastings & Prince Edward Regiment Military Museum	Free
Quinte Mall	Free
Belleville Bulls	\$9.25 - \$18
Quinte Exhibition	\$2 - \$35
Driftwood Theatre in the Park	\$0 - \$15

Events and venues in the last two years have included some performances by artists with name recognition beyond the local region. These include:

Event/ Venue	Artists
Rockfest	Alice Cooper, Lynyrd Skynyrd, 3 Doors Down, Tom Cochrane, Richard Bachman, Burton Cummings, Colin James
Waterfront & Ethnic Festival	Theory of a Deadman, Our Lady Peace, Kim Mitchell, Moist, Chantal Kreviazuk
Big Music Fest	Finger Eleven, ZZ Top, Gord Downie, Big Sugar, Collective Soul, Blue Rodeo, Hedley
Empire Theatre	Blue Rodeo, Great Big Sea, Tragically Hip, Paul Brandt, Gino Vanelli, Michelle Wright, Richard Marx, Rita MacNeil.

B-6: The destination offers a broad range of dining options.

	Measure	Yes	Almost	No
i	The destination offers a range of dining options at a range of price points.		✓	
ii	A number of restaurants have wine lists with more than 25 labels.		✓	
iii	A number of restaurants have trained accredited chefs.			✓
iv	A number of chefs/restaurants have name recognition beyond the local region.			✓

The destination offers a decent range of dining options, although it is limited in fine dining experiences. Dining options include:

Restaurant Type	Number of Restaurants	Average Entrée Price Range
Dining Café	13	\$3.25 - \$7.50
Fast Food	63	\$3 - \$8.95
Dining Mid range	73	\$6.95-\$25
Dining High – End	4	\$15 - \$44

Belleville/Quinte West has 7 restaurants with 25 different wine labels. These include:

Restaurant	Location	Wine Labels
Dinkels	Belleville	56
Paulo's Trattoria	Belleville	65
Caper's Brasserie	Belleville	500
Linguine's	Belleville	51
Earl & Angelo's	Belleville	55
L'Auberge de France	Belleville	55
Tomasso's	Trenton	35

The area has a limited number of restaurants with accredited chefs. Very few have gained recognition outside the local area, with the exception of Chef Jean Marc Salvagno (L'Auberge de France) who was featured in Toronto Life Magazine 09 and is the former owner of a critically acclaimed restaurant in Europe. A total of 11 restaurants in Belleville and Quinte West have earned an Eat Smart! Accreditation – a program that recognizes restaurants that meet exceptional standards in nutrition, safe food handling, and a smoke-free environment.

Restaurant	Location	Accredited Chef
Caper's Brasserie	Belleville	✓
Earl & Angelo's	Belleville	✓
Black Bear Ridge Golf Course	Belleville	✓
L'Auberge de France	Belleville	✓

(Based on Survey Results)

B-7: The destination offers a broad range of shopping options.

Measure	Yes	Almost	No
i The destination offers a range of retail shopping opportunities including clothing, crafts, and antiques at a range of price points.		✓	
ii Stores or galleries in the destination area have name recognition beyond the local region (branded items or otherwise, excluding chain department stores).	✓		

Shopping Destinations	High End	Mainstream / Average	Bargain / Discount	Total
Antique Stores	2	7		9
Antique Markets	-	2	-	1
Specialty Shops	2	2	-	4
Bookstores	-	3	2	5
Jewellery Stores	3	10	-	13
Farmers Markets	-	10	-	10
Flea Markets	-	2	-	2
Factory Outlets	-	6		7
Liquor Stores/ Beer	-	5		5
Grocery Stores	-	9	-	9
General Variety Stores	-	28	-	28
Farm Gate Sales	-	24	-	24
Art/ Gallery Stores	3	15	-	18
Day Spas	2	20	-	22

Some stores and galleries in Belleville/Quinte West have name recognition beyond the local region (branded items or otherwise, excluded chain department stores). Some examples of these are:

- **Maple Dale Cheese:** This 100-year old business won Grand Champion at the prestigious British Empire Cheese Show and ships products to Europe and North American markets. The factory, located on Hwy 37, produces over 3 million pounds of cheese annually.
- **Timberwolf Gallery:** Quinte West artist Doug Comeau is nationally known for his achievements in the medium of graphite and coloured pencil. He is one of Canada's foremost pencil artists and has done countless pieces for the Ontario Federation of Anglers and Hunters, as well as Ducks Unlimited. Comeau is responsible for creating one of Canada's largest coloured pencil drawings, which now hangs in the new Quinte West city hall.
- **The Stonechurch Museum of Art:** Artist Dennis Noble was commissioned by Canada Post to design and paint the berry stamps (2003), ten maple tree stamps for Canada Day (1994) and the lighthouse series which won him the Stamp of the Year award in 1981. Between 1966 and 1987 his paintings appeared in shows at the Art Gallery of Ontario and in the Hazelton Lane, Pagurian, and Market Galleries in Toronto, among others. Since then the Stonechurch has taken over this function, housing the permanent collection of 78 of the 283 paintings of the Lovers Series, which Dennis Noble has painted since the early 1990s.

- **Reid’s Family Fun Dairy:** Reid’s began producing products for the Ontario market in 1967 before moving to its current location on Bell Boulevard in 1985. This full-service dairy is also home to the 100-foot fairy tale castle (a landmark to passing motorists on the 401), a petting zoo, playground, and ice cream parlour and outlet store. Visitors can experience first-hand the dairy process thanks to a large viewing window connecting the store to the plant and a vintage photograph wall display, which includes a wrap-around movie reel highlighting the history of Reid's Dairy.
- **Stockdale Mill:** Located in Quinte West, this unique business offers a bistro, art gallery, studio, yoga and art classes, and is available for private functions. The art gallery also features a permanent display for award-winning photographer Gabi von Gans and the Funktional Art and Design Boutique. Fifty percent of visitors to Stockdale Mill Art Gallery and Boutique come from outside the local area.

C SATISFACTION AND VALUE

This section documents the extent to which Belleville/Quinte West offers its guests a warm welcome, satisfies expectations, and offers value for money. The evaluation process has identified how guests and outside marketers view the region against their attributes. It also evaluates how Belleville and Quinte West are investing in improving the performance of the areas.

C-1: Guests feel welcomed into a community that is happy to host, serve or engage them.

Measure		Yes	Almost	No
i	The destination is considered “friendly” or “very hospitable” by guests and by travel agents and tour operators packaging experiences at the destination.		✓	

In 2006, Belleville participated in an exchange program with the City of Brockville. A team from that community visited and provided a report outlining their first impressions of the city’s downtown gateways and appearance, infrastructure, accommodations and food, arts and culture, and recreational facilities. In addition, Belleville was ranked on customer service and the general attitude of local residents.

The team noted that people were friendly and helpful, but were not necessarily knowledgeable about their city or its history. The team also noted they were pleased with the level of customer service from downtown merchants, felt the hours of operation were reasonable, and approved of the city’s one hour free parking program.

Beyond this, it’s difficult to surmise whether the destination is considered “hospitable” as there is no formal guest experience survey in place for Belleville and Quinte West.

C-2: The destination offers a highly satisfying experience to its guests.

Measure		Yes	Almost	No
i	The destination carries out regular surveys which track guest satisfaction and their perceptions of value and hospitality			✓
ii	The most recent survey indicated that most guests were very satisfied with their destination experience			✓

Neither Quinte West nor Belleville carries out regular formal surveys which track guest satisfaction and their perceptions of value and hospitality.

Informally, the Bay of Quinte Tourism Council is attempting to gather this information through a feature on their new website which invites visitors to share their experiences of touring the area. Individual businesses appear to have made limited effort to monitor satisfaction levels, relying mainly on word-of-mouth feedback and comment cards.

C-3: The destination is perceived as offering value for money spent.

	Measure	Yes	Almost	No
i	The destination is considered “good value” or “expensive but worth every cent” by guests and by travel agents and tour operators packaging experiences at the destination.			✓
ii	Key experiences and services prices are monitored and staying consistent or trending up.		✓	
iii	Visitation is trending upwards.			✓

Opinions regarding value and guest experiences cannot be determined as there is no formal program in place to track satisfaction levels in Quinte West or Belleville

The majority of key experiences and services are trending upwards as shown by the following chart:

Key Experiences/Service	Current Price	Trend
Golf Fees	\$12 - \$70	Stayed the same
Empire Theatre	\$7 - \$45	Increased (% n/a)
Festivals & Events	Free - \$75	Increased up to 15%
Roofed Accommodations	\$51 - \$200	Increased by 2-6 %
Restaurant Meals	\$3 - \$44	Increased by 2-7%

Surveys identified that visitation has, for the most part, remained the same. Of the 72 surveys received, 33 respondents noted changes in their visitation. Twelve stated their visitation had dropped from 5-30%, while 21 businesses/organizations said their visitation had increased between 2 – 68%. Drops in visitation could be associated a declining economy, high Canadian dollar, increased border security and documentation requirements, and the high price of gas.

Local Visitor Information Centres have reported a higher than average number of Quebec and European travelers in the past two years.

D ACCESSIBILITY

This section assesses the ease of getting to Belleville and Quinte West, the transportation modes that serve it and the importance of transportation to the tourist experience. The evaluation process has identified how accessible the two cities are to tourists and how well that accessibility is being managed.

D-1: The destination is within 2-3 hours drive from a major population centre or international gateway, or a lesser drive time from a regional gateway.

	Measure	Yes	Almost	No
i	The travel time to the nearest major urban market is less than 3 hours.	✓		
ii	The population within the three hour drive time is substantial.	✓		
iii	Drive time from the nearest U.S. border crossing or international airport is less than two hours.	✓		
iv	Flight time from the international airport to the nearest regional airport is less than 1 hour.	✓		
v	Drive time from that regional airport is less than one hour.	✓		

The travel time to the nearest major urban market is less than three hours (using Belleville as a base).

- The Greater Toronto area is the closest and largest urban area with an estimated drive time of 1.5 hours or 190km. (5.3 million).
- The city of Kingston is 75 km or 45 min (152,358)
- The city of Peterborough 105 km or 1hr. away (116,579).
- The city of Ottawa 230 km or 2.5 hr away (1.2 million).
- The city of Montreal 225 km or 3.5 hr. away (3.8 million)

The population within a three hour drive is substantial at more than 7 million. Southern Ontario, being in such close proximity to upstate New York and Michigan, provides a much larger market to target tourism. Belleville and Quinte West have the opportunity to benefit from seasonal tourism in Prince Edward County, as well as “accidental tourism” from motorists wishing to pull off the Hwy 401 corridor.

The distance to the nearest U.S. border crossing (Thousand Island Bridge) is 161km, or a two hour drive.

There is a small aircraft landing strip in Bancroft. The closest regional airports are Peterborough and Kingston. The nearest international airports include Toronto’s Pearson Airport, Ottawa MacDonald-Cartier Airport, and the Montreal Trudeau Airport.

D-2: Travel from the nearest urban centre or gateway is not unpleasant, and is achievable with minimum effort and discomfort.

Measure		Yes	Almost	No
i	Travel from the nearest urban centre or gateway is not unpleasant.	✓		
ii	A direct connection to the destination (e.g. via a shuttle bus service) is conveniently available, or travel by private car is over a route (s) generally accepted as direct and well marked.	✓		

Travel from the nearest urban centre of Toronto is not unpleasant and supported by the following local and provincial highways:

- Highway 401 - four lanes of traffic going east and west, the road surface is well maintained and signage is displayed well.
- Highway #2 – two to four lanes of traffic running east to west through Belleville and Quinte West. Offers a scenic view of the Bay of Quinte
- Highway #62 - runs north to south and connects the City of Belleville with the County of Hastings and Prince Edward County. Pleasant rural scenery and well maintained roads.
- Highway #37 - runs north to south and serves as a major shortcut route between Toronto and Ottawa. Easily accessible from Hwy 401. Nice rural landscape and quaint villages along the way.
- Highway #33 - accessible from Hwy 401 and runs north to south, connecting the northern most part of Quinte West with Prince Edward County. Also known as the historic Loyalist Parkway.

The secondary routes are generally well maintained with acceptable road signage.

D-3: The destination is accessible by alternative travel modes and price options.

Measure		Yes	Almost	No
i.	Alternative modes of travel from the urban centre/ gateway are available.	✓		
ii.	If located on water, the destination is accessible to cruise ships.			✓
iii.	If located on the water, the destination offers slips to transient boaters.	✓		
iv.	If located on the water, the destination's cruise ship and / or transient marina slip dockage are located in or close to downtown or the attraction, with attractive and comfortable spaces between them.	✓		

Travel to Belleville and Quinte West can be done by vehicle, bus, train or by private boat. Highways 62, 37, 33, and 2 are all connecting routes to these two cities.

VIA Rail service is available in Belleville and Trenton and makes daily runs to Ottawa, Kingston, Montreal and Quebec City. In 2009, VIA announced plans to build a new station with expand services in Belleville. The project is linked with other work throughout the Quebec-Windsor Corridor, which generates almost 90% of VIA's ridership and 75% of its revenue.

Greyhound Canada runs regular service to Quinte West and Belleville, with stops located at 442 Front St. Trenton and 165 Pinnacle St. Belleville. Coach Canada also stops in both cities with service mostly to the Toronto International Airport. Local charter companies include Franklin Tours, Foley Tours, and McCoy Tours, which offer day trip options and local pickup. Belleville and Quinte West both have public transit.

Combined, Belleville and Quinte West offer a total of 11 marinas with 782 seasonal slips and 130 transient slips. Four of the marinas are located within walking distance of the downtown areas where boaters are easily able to access dining, shopping and other amenities.

Local waterways do not have the depth to accommodate large cruise ships.

D-4: The destination is investing in making access to it and its attractions attractive and visitor friendly.

Measure		Yes	Almost	No
i	The transportation check list has been completed.	✓		
ii	A minimum of 9 “yes” have been recorded (a minimum of 6 “Yes” are required as an almost.	✓		

Belleville and Quinte West have a total of 22 “yeses” and is considered to be accessible for tourists In terms of transportation options.

In regards to investments to access, the City of Quinte West has approved a plan to build a new \$10.6-million marina near the mouth of the Trent River. It will feature 380 slips, parking facilities, a network of waterfront trails, and a 6,400-square-foot building with showers, washrooms and a seasonal concession.

A marketing study prepared for the city by Shoreplan Engineering Ltd. indicates that the demand for boat slips will grow to 710 by 2015 and reach 1,000 by 2020. The project hinges on funding assistance from upper tier governments.

E ACCOMMODATIONS BASE

This section measures and assesses the breadth and depth of Belleville and Quinte West’s offerings in terms of the range of accommodation classes available, the range of locations available, and the presence of high-end operators. The evaluation characterizes Hastings County’s accommodations base.

E-1: The destination offers accommodations across a range of types and a variety of quality levels and price points.

	Measure	Yes	Almost	No
i	The destination offers rooms at a variety of quality levels and price points.	✓		
ii	There is a range of choices in locations relevant to attractions / venues and a range of price points.	✓		
iii	This inventory includes representation by “branded” (widely known and respected) higher-end operators.	✓		

Guests staying in Belleville and Quinte West have an option of 1131 rooms and 574 campsites at a variety of price ranges. Accommodation classes range from full service bed and breakfasts and resorts, to campsites and RV Parks, with a variety of options in between.

Accommodation Class	Properties	Rooms/Sites	Price Range
RV Parks & Campsites	6	574 (sites)	\$25-\$34
Cottages	5	57	\$50-\$800
B&B	12	32	\$51-\$150
Resort /Retreat	0	0	0
Lodge	0	0	0
Motel Independent	5	162	\$51 - \$100
Motel Chain	0	0	0
Hotel/Inn Chain	10	880	\$51 - \$150
TOTAL	38	1131 rooms + 574 sites	

The following properties are in close proximity to core attractors:

Property	Closest to Core Attractor (distance)
Travelodge	National Air Force Museum (4.1 km)
Park Motel	National Air Force Museum (1.9 km)
Weller's Bay Campground	Bay of Quinte (less than 1 km)
Howard Johnson	Trent Severn Waterway (5 km)

There are 10 branded or widely known hotels in the Belleville and Quinte West area. They are:

- Ramada Hotel
- Holiday Inn
- Holiday Inn Express
- Comfort Inn (2 locations: Quinte West and Belleville)
- Clarion Inn
- Fairfield Inn by Marriott
- Travelodge
- Howard Johnson
- Best Western

Meeting and Reception Facilities:

A variety of meeting facilities were found while completing the Resource Audit. Hotels, motels, community halls and clubs, golf courses, theatres and museums are available for social or business gatherings throughout Belleville and Quinte West. Arrangements for catering can be arranged through local clubs, organizations, or businesses. There is one convention centre with the capacity to hold up to 500 guests.

Property Type	Total	Kitchen On-site	Capacity	LLBO License
Community Halls/Centres	15	Yes	75-300	No
Service Clubs	13	Yes	50-400	Yes
Golf Clubs	6	Yes	40-150	Yes
Arts Centres/Theatres	3	N/A	30-700	N/A
Library	2	N/A	42-150	N/A
Restaurant	7	Yes	20-150	Yes
Museum	2	No	25-400	N/A
Resort/Banquet Hall	1	Yes	50-300	Yes
Accommodations	11	Yes	6-200	Yes
Convention Centre	1	Yes	2-500	Yes

PERFORMANCE

The PERFORMANCE elements, criteria, and measures identify the extent to which Belleville and Quinte West are successful and recognized in the marketplace. Belleville and Quinte West's performance attributes are compared against its primary competitors in a competitive marketplace context to determine its actual performance. Visitation statistics, accommodation occupancy levels, and critical acclaim are all industry standards to measure performance.

The quality of the tourist's experience and the destination's success in providing it is validated by:

- i. Visitation
- ii. Occupancy and Yield
- iii. Critical Acclaim

F VISITATION

This section assesses Belleville and Quinte West's market performance in terms of visitation numbers and market share, attractiveness to different market segments, and attractiveness of the destination at different times of the year. The evaluation identifies the cities' absolute and relative visitation performance.

F-1: The destination draws a significant share of Ontario's total travel to attractions of its type.

	Measure	Yes	Almost	No
i	The destination attracts a significant number of guests.		✓	
ii	The destination attracts a significant share of the total VFR/Pleasure motivated travel by residents of Ontario.			✓
iii	The destination attracts a significant portion of its visitors from beyond its borders.			✓
iv	The destination's share of visits from all visitors (day and overnight) to the province from markets beyond Ontario's borders is significant.			✓
v	The destination's share of meetings and conventions-motivated travel to Ontario is significant.			✓
vi	Total visitation is not dominated by same day guests.		✓	
vii	The destination's share of visits in Ontario, which includes activities relying on the destination's core attractions classes, is significant.			✓
vii	The destination's share of visits identified above is significant in comparison to competitive destinations in Ontario.			✓

In 2008, Hastings County, which includes Quinte West and Belleville, attracted 1,527,000 guests - 759,000 guests on day visits, and 768,000 staying overnight. Destination visitations captured 1,136,000 or 2.6% of the total 43,377,000 (#) VFR/Pleasure motivated trips taken by Ontario residents.

Duration of Stay	Person visits to Hastings County	% of breakdown visits
Overnight	768,000	49.3%
Same Day	759,000	49.7%
Total	1,527,000	100%

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2008)

In 2008, overnight guests from the following origin markets accounted for the following proportions of Hastings County's overnight visitations:

Overnight Visits	Persons visits to Hastings County	% breakdown of visits
From other Provinces	44,000	5.7%
From the U.S.	49,000	6.3%
From International Markets	10,000	1.4%
From Ontario	666,000	86.6%
Total	769,000	100%

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2008)

In 2008, same day visitors from the following origin markets accounted for the following proportions of Hastings County's same day visits:

Same Day Visits	Persons visit to Hastings County	% breakdown of visits
From other Provinces	0	0
From the U.S.	14,000	1.8%
From Other International markets	1,000	.2%
From Ontario	709,000	98.%
Total	759,000	100%

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2008)

Also in 2008 destination visits by guest from the following origin markets accounted for the identified share of out-of-province visitations to Ontario:

- i. 0.4% of the total 4,853,000 trips to Ontario by guests from other provinces
- ii. 0.39% of the total 15,063,000 trips to Ontario by guests from the United States
- iii. 0.95% of the total 2,195,000 trips to Ontario by other international guests

Hastings' share of meeting and convention-motivated travel to Ontario is not significant. In the year 2008, the region attracted 82,000 meeting and convention-motivated trips, or 1.52% of the total meeting and convention-motivated trips to Ontario.

The total visitation for same day guests to Hastings County was 53.9% and overnight visitors accounted for the remaining 46.1%.

Hastings County's destination visitation in 2008 included the activities identified below. There was no significant impact on the total visits in Ontario where visitors participated in the same activity.

Top Key Activities	Total Visits to Ontario	Total visits To Hastings	Hastings County % share of trips
Parks /Trails	5,039,000	61,000	1.2%
Festivals/ Fairs	2,200,000	15,000	0.6%
Historic Sites	4,526,000	37,000	0.81%
Fishing	4,902,000	141,000	2.8%
Cultural Performances	2,915,000	29,000	1%
Museums/ Galleries	3,735,000	19,000	0.50%

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2008)

F-2: The destination offering draws from multiple market segments.

	Measure	Yes	Almost	No
i	The destination attracts visitors with differing visitor profiles	✓		

The destination attracts visitors with differing visitor profiles, including the following market segments:

- Families
- Upscale Adventurers
- Young Go-Gos
- Retired Roamers

F-3: The destination offering draws from market segments over more than one season

	Measure	Yes	Almost	No
i	Visitation is distributed among multiple market segments over more than one season.	✓		

Quarterly distribution of total visitation is as follows:

Hastings County Visitation By Season			
Q1	Q2	Q3	Q4
247,000	291,000	610,000	378,000

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2008)

G OCCUPANCY AND YIELD

This section assesses Belleville, Quinte West market performance in terms of accommodation occupancy and guest expenditure levels. The evaluation compared occupancy and expenditure performance against industry and provincial averages.

G-1: The commercial accommodations occupancy rates in excess of 40%

	Measure	Yes	Almost	No
i	The average accommodations occupancy rate is over 65%.			✓
ii	Occupancy is spread throughout the year.			✓

Ontario Occupancy Rates									
	2000	2001	2002	2003	2004	2005	2006	2007	2008
Hotel Occupancy Rate (%)	67.2	62.7	61.7	57.1	61.8	62.1	63.0	62.8	61.5
Revenue Per Room (REVPAR) (\$)	77.17	74.25	73.41	64.33	73.88	75.04	78.60	79.25	78.17
Average Daily Room Rate (\$)	114.83	118.42	118.98	112.74	119.54	120.84	124.73	126.19	127.12
Hastings/ Belleville/ Quinte West Occupancy Rates									
	2000	2001	2002	2003	2004	2005	2006	2007	2008
Hotel Occupancy Rate (%)	57.2	53.9	55.2	55.2	55.7	58.2	60.1	59.4	49.9
Revenue Per Room (REVPAR) (\$)	45.59	45.00	47.22	46.94	48.99	52.75	55.08	56.23	57.74
Average Daily Room Rate (\$)	79.71	83.49	85.54	85.10	87.93	90.64	91.64	94.64	115.76

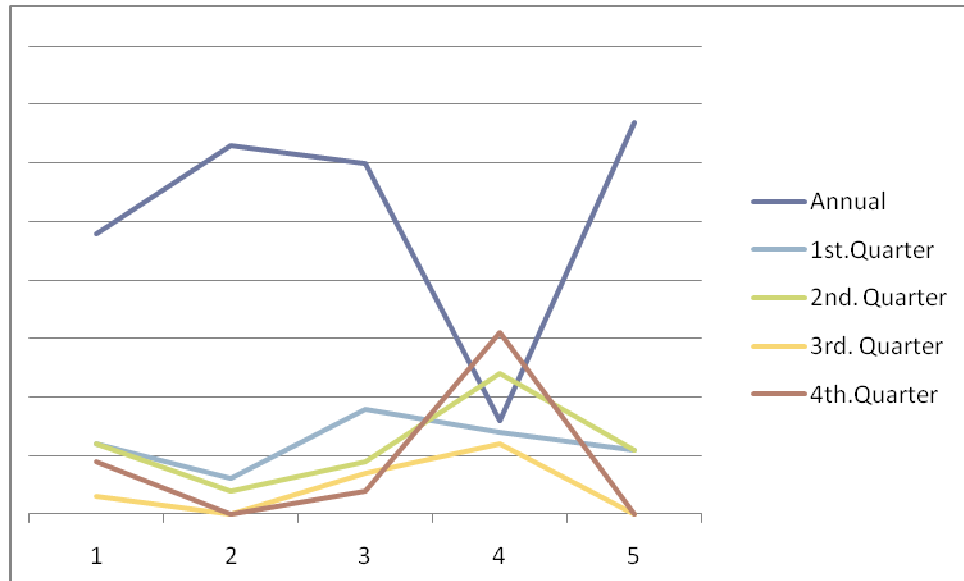
PKF Consulting 2008

Accommodation occupancy rates in Belleville Quinte West /Hastings County are not spread evenly throughout the year. During the winter season there is a significant drop in accommodation attendance according to PRTD survey results which captured 2008 occupancy rates.

Occupancy in 2008	Annual %	Q1	Q2	Q3	Q4
Under 50%	48%	63%	60%	16%	67%
50-64%	12%	6%	18%	14%	11%
65-74%	12%	4%	9%	24%	11%
75-84%	3%	0	7%	12%	0
Over 85%	9%	0	4%	31%	0
N/A	15%	15%	4%	3%	12%

PRTD survey results

Survey Results/Occupancy Rates



G-2 : The destination attracts a significant share of total provincial expenditures:

	Measure	Yes	Almost	No
i	The average expenditure per capita for guests on day trips to the destination is equal to or greater than the provincial average.			✓
ii	The average expenditure per capita for guests on overnight trips to the destination is equal to or greater than the provincial average.			✓
ii	The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips in Ontario.			✓
iv	The destination's share of expenditures by guests on day trips is equal to or greater than its share of day trips in Ontario.			✓

In 2008, the average expenditure per capita for guests on day trips in the region was \$113 or 64% of the provincial average of \$175. The average expenditure per capita for guests on overnight trips was \$133 or 43% of the \$310 provincial average.

While expenditures per capita for both day trips and overnight visitors to Hastings County are below the provincial average, this is not a characteristic unique to this destination. Neighbouring "Getaway Country", a six region area in Central Ontario including Durham and Peterborough and the Kawarthas, also have visitor expenditures below the provincial average. This can be explained, at least in part, by the limited convention and conference facilities and visitors in these areas compared to large urban centers like Toronto. Higher spending habits and duration of stay by guests attending conferences and conventions tends to skew the provincial average upwards.

The total amount of visitor spending while on day trips to Hastings County in 2008 equalled to \$172,158,000 in comparison the total spending for Ontario by all day trip guests was \$17,628,560,000.

The destination's share of total spending by tourists was 7.9%. Total spending by overnight guests equalled \$102,341,000, whereas the total spending by all overnight tourists in the province was \$13,127,419,000.

2008 Regional Tourist Profiles Hastings County Total and Average Visitor Spending				
Origin	Total Visitor Spending (000s)		Average Visitor Spending per Person Visit	
	Total	Overnight Visits	Total	Overnight Visits
Total	\$172,158,000	\$102,341,000	\$113	\$133
Ontario	\$144,919,000	\$75,963,000	\$103	\$114
Other Canada	\$9,503,000	\$9,503,000	\$216	\$216
U.S.	\$12,922,000	\$12,127,000	\$206	\$250
Overseas	\$4,814,000	\$4,749,000	\$454	\$490

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2008)

H CRITICAL ACCLAIM

This section addresses the extent to which Belleville and Quinte West are recognized as a must-see destination, have a profile that contributes to the attractiveness of Ontario and Canada as a destination, and, are a “top-ranked” place to visit. The evaluation identifies if Belleville and Quinte West are recognized as standing out from their competitors.

H-1: The destination is considered as “must see / must do” and is recognized as a symbol of its type of travel experience.

	Measure	Yes	Almost	No
i	The destination is near the top of the list of places out-of town guests must be taken, or things guests must do when “seeing the sights” in the wider travel region.			✓
ii	The destination is at or near top of mind when considering “must see/must do” places or activities offering the same type of travel experience as the destination.			✓

It cannot be said that the destination is at the top of the list of places out-of-town guests must be taken, or things guest must do when “seeing the sights” in the wider travel region. That being said, there are several unique experiences for the offering in Belleville and Quinte West, such as:

- Visiting the Bleadell Boulder - believed to be the largest glacial erratic in Ontario. It is a metamorphic rock originating from north-eastern Ontario. It is 44 feet long, 24 feet wide, and 19 - 22 feet high.
- Viewing aircraft – both static and active at the foot of 8 Wing/CFB Trenton’s runway and the National Air Force Museum of Canada.
- Attending a music or live theatre performance at the Empire Theatre or Pinnacle Playhouse.
- Searching for treasure as part of the Geocaching GPS Treasure Hunting Program in Quinte West.
- Enjoying an ice cream treat at Reid’s Dairy while visiting the animals at their petting zoo.
- Browsing through stores in the downtown cores of Belleville and Quinte West

The following list of experiences and features in Belleville and Quinte West are included in Ontario Tourism Marketing Partnership Corporation’s (OTMPC) website and are designated as “must see”:

- National Air Force Museum of Canada
- Walleye fishing in Belleville, the “Sport fishing Capital of Ontario”
- Exploring Ontario’s Oldest Road in Carrying Place
- Driving the scenic Loyalist Parkway from Kingston to Trenton

Based on the number of outdoor recreational opportunities, events and festivals and historical attractions, Quinte West and Belleville would compare favourably with other destinations offering similar experiences.

H-2: The destination has a role in branding/ marketing Ontario and/or Canada.

Measure		Yes	Almost	No
i	Destination imagery of, and/or text about the destination or its core attraction(s) is used in promoting Ontario and/or Canada.			✓

Belleville and Quinte West do not play a significant role in the branding or marketing of Ontario or Canada. Although Quinte Country is mentioned on the Ontario Travel website under the Eastern Region heading, most of the information and imagery found in the section deals with Prince Edward County attractions.

H-3: The destination or its attractions have been ranked “Best in Class” or “Top Tier” in consumer or industry rankings.

Measure		Yes	Almost	No
i	The destination or its core attraction(s) has (have) been ranked as “Number 1,” “Best in Class” or “top tier.			✓
ii	Other products or experiences in the destination have been ranked as “Number 1,” “Best in Class,” “top tier” or otherwise recommended.			✓

Aside from many Reader’s Choice awards from the local Belleville Intelligencer newspaper, only a few organizations have been recognized by publications outside of the local region. These include:

Organization Name	Award and Publication
Batawa Ski Hill	Entrepreneur Business of the Year, Ski Magazine 2009
Best Western Belleville	Chairwoman's award for Excellence in service and product, cleanliness. Ranked top 5% of all Best Westerns in North America.
Dinkels Restaurant & Courtyard / Paulo's Italian Trattoria	VQA Restaurant of Excellence, Wine Growers of Ontario 2009
Capers	Wine Spectator Award of Excellence 2009
City of Belleville	National Finalist for Communities in Bloom
Mapledale Cheese	Grand Champion, Royal Winter Fair

Black Bear Ridge Golf Course	<ul style="list-style-type: none"> • Top 100 Course in Canada, SCORE Golf Magazine 2008 • 4th Best Conditioned Course in Canada, SCORE Golf Magazine 08 • Bill Fach - Superintendent of The Year, Canadian Golf Superintendents Association 2008 • The Bogeyman's Favourite Course East of Toronto, Toronto Star 2007 • Best New Golf Course East of Toronto, Golf Digest Magazine 2006 • Best New Golf Course East of Toronto, SCORE Golf Magazine 2006 • Best New Public Course in Ontario, Fairways Magazine 2005
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I DESTINATION MARKETING

The Destination Marketing criteria and measures identify the extent to which the destination:

- targets viable markets;
- invests in managing and promoting its tourism marketplace; and,
- consults with the travel trade operators and agents serving area visitors and residents.

On completion of Section I, you will have identified whether and how the destination is actively matching its products to the expectations of the tourism marketplace, and taking advantage of the skills and knowledge of its travel trade assets.

I-1 : The destination's product offerings are created and packaged to attract significant market segments with prospects for stability if not growth.

Measure		Yes	Almost	No
i	There is a market demand for the destination's type of offering.	✓		
ii	Market demand to the destination's type of offering is stable or growing.		✓	

The Travel Activities and Motivation Study (TAMS) on Canadian and American Travelers were conducted between January and June 2006. In the previous two years (2004 and 2005), 84% of adult Canadians and 79% of adult Americans had taken an overnight trip.

In the case of Belleville/Quinte West, the 2006 Travel Activities and Motivations study indicates that the destination has what the travelers want in varying degrees, and that there is a market demand for the destination's offerings:

Activity	Motivated Trips
All Water based Outdoor Activities	33 %
Festival & Fairs	28 %
Fresh Water Fishing	10 %
Swimming in Lakes	9 %
Lakeside / Riverside Resort	7 %
Visiting well known historic sites and buildings	6 %
Rock and Roll / Popular Concert	6 %
Live Theatre	5 %
Hiking-same day excursion while on overnight trip.	5 %
Motor Boating	4 %
Ice Fishing	3 %

There is definitely a market demand for the type of offering available in Quinte West and Belleville. Based on local accommodations receipts and inquires through the tourism centres, the demand is stable and growing. This demand trend can be illustrated by looking at three key activities which generate tourism in the two cities:

Outdoor Activities

Over the last two years, 61.6% (15,269,616) of adult Canadians participated in outdoor activities while on an out-of-town pleasure trip of one or more nights. This represents 82.8% of the Canadian Pleasure Travelers (i.e., those who took at least one pleasure trip in the past two years).

Swimming & Boating

Over the last two years, 30.6% (7,579,543) of adult Canadians went swimming and boating while on an out-of-town, overnight trip of one or more nights. Swimming and boating was the third most common outdoor activity undertaken by Canadian Pleasure Travelers while traveling in the past two years. Swimming in lakes (26.2%) was the most popular activity, followed by motor boating (13.4%) and waterskiing (4.1%). Approximately 2.5% (613,306) of adult Canadians participated in all three activities when on trips in the past two years. Of those who went swimming or boating, 27.2% (2,063,351) reported that this activity was the main reason for taking at least one trip.

Museums

Also over the last two years, 43.4% (10,751,004) of adult Canadians visited a historical site, museum or art gallery while on an out-of-town, overnight trip of one or more nights. Visiting historic sites and buildings was the most popular activity (e.g., strolling around a city, 30.6%, well-known sites & buildings, 22.5%, other sites & monuments, 18.5%), followed by viewing natural wonders (18.1%) and visiting general history museums (17.4%), art galleries (14.5%), historical replicas (7.9%), military museums (7.1%) and paleontological or archaeological sites (5.4%). Other than shopping and dining, visiting historical sites, museums and art galleries was the most common activity undertaken by Canadian Pleasure Travelers while on trips in the past two years. Of those who visited historical sites, museums and galleries, 29.2% (3,138,722) reported that this activity was the main reason for taking at least one trip.

Source: *Travel Activities & Motivations Survey 2008*

I-2: There is a Destination Marketing Organization (DMO) in place with funding sufficient to sustain awareness and motivate travel from target markets.

	Measure	Yes	Almost	No
i	There is a DMO in place with a focus on the local destination vs. a larger travel region.	✓		
ii	The DMO is funded at a level sufficient to reach target markets through print and electronic (e.g. Internet, toll-free phone lines, etc.) media.			✓
iii	The DMO conducts surveys which track the influence of marketing on guest visits.			✓

There is a DMO in place for marketing the Bay of Quinte area with a focus on the local destination vs. a larger travel region. Bay of Quinte Tourist Council is the primary DMO for Belleville and Quinte West and is responsible to the external marketing of the region (incl. Belleville, Quinte West, Napanee, Tyendinaga, Prince Edward County and Brighton) as a tourism destination.

In addition, both Quinte West and Belleville have municipal staff and Chambers of Commerce which have roles in promoting tourism through the operation of visitor information centres, publications, and websites outlining experiences in and around their respective destinations (i.e. www.quintewesttourism.ca). Members from the chambers are also involved with the Bay of Quinte Tourist Council.

The primary DMO is not funded at a level sufficient to effectively reach target markets interested in the destination's tourism experiences through print and electronic (e.g. Internet, toll-free phone lines, etc.) media or other means such as consumer shows, travel trade shows and events.

The Bay of Quinte Tourist Council currently operates with an annual budget of \$30,000 and is expecting a further \$30,000 in the way of grants from the Ontario Tourism Marketing Partnership Corporation. In 2010, these funds will be allocated primarily for radio and web advertising to reach a single market – the greater Ottawa region.

The cities of Belleville and Quinte West have their own budgets and apportion a percentage on communications and marketing. Collectively, the DMOs spend \$167,500 on marketing the destination.

Destination Marketing Organization	2009 Annual Communications Dollars
Bay of Quinte Tourism Council	\$30,000
City of Belleville	\$72,500
City of Quinte West	\$65,000

Bay of Quinte Tourist Council does not conduct formal surveys to track consumer response indicators (i.e. the influence of marketing tactics or ad campaigns on guest visits) but does track visits to their website www.bayofquintecountry.com. Quinte West Chamber of Commerce and Belleville District Chamber of Commerce both track tourism requests and visits to their information centres.

I-3: Travel Trade operators and agents have been contacted for advice on product and package development opportunities

Measure		Yes	Almost	No
i	The Travel Trade Resources Checklist has been completed and;	✓		
ii	A minimum of 10 “Yeses” has been recorded (A minimum of 7 “Yeses” is required for an “Almost”)	✓		

Foley Bus Tours, a local receptive tour operator, organized eight group tours to the National Air Force Museum of Canada in 2009. The average group size was 40 per tour.

The Travel Trade Resources Checklist was completed and tour operators who bring groups to Belleville and Quinte West were contacted during the resource audit to discuss product and package development opportunities.

I-4: A tourism development and marketing strategy is in place.

Measure		Yes	Almost	No
i	A destination development and marketing strategy focusing on growth in visitation and/or yield has been developed and is being implemented.			✓

The Bay of Quinte Tourist Council operates under the mandate of “increasing tourism to the Bay of Quinte Area”. They do so through the partnership of all levels of government, business, economic development and the arts to create the brand “Bay of Quinte Country”.

The organization is currently implementing a five-year plan which includes the replacement of signage along Hwy 401, incorporating a new Visitor Centre in Belleville, the creation of tourism routes, investing in existing assets, and launching a new website to showcase area attractions.

“The main strategy of the council is to increase visits and overnight stays to the region in September, October, and November. They plan to achieve this through coordinated Sports Tourism efforts, retention and attraction of visitors from the summer tourist season, increased education of packages available, tours, and events throughout the fall season, and increased investment and involvement in the Quinte Area throughout the full year.”

(Source: www.bayofquinte.com)

The City of Quinte West has developed a marketing plan and is in the process of implementing it under their new brand – “Quinte West – A Natural Attraction.”

Through the use of print and broadcast media, websites, trade show booths, brochures and tourist guides, the plan targets two main groups – young adventurous families and sportsmen (boaters, anglers, campers).

“The core message or copy strategy will position Quinte West as a ‘near’ destination: an attractive and natural, rural setting but with urban attributes – attractive to all types of visitors: tourists, business people and potential relocaters – both corporate and families. Plus it’s home to Canada’s largest Air Force base at Trenton.”

Source: Quinte West Marketing Plan

I-5: Performance towards the development plan's objectives is being monitored.

Measure		Yes	Almost	No
i	A program for tracking progress towards objectives is in place.		✓	

A marketing plan focusing on increased visitation, particularly in the fall season, has been developed and is being implemented by the Bay of Quinte Tourist Council. Results can be tracked through the number of visitations to information centres, occupancy levels at local hotels, motels and B&Bs, attendance rates for festivals and events and number of “hits” to the Bay of Quinte Country website.

I-6: Customer service training programs are in place.

Measure		Yes	Almost	No
i	There is a customer service training program in place at the key experience/activity providers, as well as programs for the service community generally.			✓

There is no formal region-wide customer service training in place at the key experience/activity providers as well as programs for the service community generally.

J ***PRODUCT RENEWAL***

This section assesses the extent to which the destination is making capital investments in its attractiveness into the future. The evaluation process has identified the status and magnitude of destination investment in the future.

J-1: Reinvestment and new investment is occurring to enhance, revitalize, or develop facilities relevant to the quality of the tourist experience.

Measures		Yes	Almost	No
i	In the past five years capital has been invested in facility renewal, expansion, or development.		✓	
ii	A significant portion of that investment occurred in the past two years.		✓	
iii	Core attractions demonstrate an ongoing commitment to reinvesting in programming and other improvements in order to enhance the visitor experience.		✓	

Within the past five years 37% of the businesses from Belleville /Quinte West, who participated in the survey, indicated that they have invested capital in their business to improve or expand their facility.

Sector	Investment
Trails/Parks	\$258,000
Attractions	\$5,400,000
Accommodations	\$1,080,000
Retail	\$688,600
Food & Beverage	\$79,800
Marinas/Golf	\$100,000

(Figures based on survey results)

The reported investment totalled \$9,757,600 with a significant portion of that investment occurring within the past two years. A further 27% of respondents indicated that they planned to modify or expand their operation in the next three years. Core attractions have demonstrated an ongoing commitment to reinvesting in outdoor experiences.

Plans are in place to enhance core attractions in Belleville and Quinte West. Examples of this include:

- **Friends of The Trail:** Management of the rail bed from Trenton to Glen Ross, new benches and gates, planting endangered butternut trees, signage, developing Trent Canal Riverside section of Lower Trent Trail.
- **Quinte Conservation:** Plan to invest capital to create accessible trails.
- **Bay of Quinte Golf Club:** Will be erecting new buildings on their site and well as making improvements to their golf course.
- **Black Bear Ridge Golf Course:** Building new banquet facilities to accommodate events, meetings and weddings.
- **National Air Force Museum of Canada:** Will be investing further capital to add new exhibits and additional washroom facilities.
- **Trent Severn Waterway:** The federal government is currently engaged in a five-year, \$83-million project to maintain, repair and place infrastructure for the entire Trent Severn Waterway.

J-2: Investment and reinvestment in underdeveloped or underperforming assets is occurring.

Measure		Yes	Almost	No
i	Underdeveloped and underperforming assets (or the absence of same) have been identified in the Resource Audit.	✓		
ii	Investments and/or reinvestments are being made in developing or revitalizing underdeveloped or underperforming assets.		✓	

Through the Resource Audit and consultation with tourism industry leaders, it has become clear that Belleville/Quinte West have assets that offer incremental tourism potential.

- **Tourist Information Centre:** Currently there is only one tourist information centre in the City of Belleville; however it is not located in an area visible to tourists. Council has discussed the possibility of erecting a new self-serve tourist information centre at the base of the Bay Bridge to entice tourists travelling from Prince Edward County to explore this community as well. Consideration should also be given to an information centre closer to Hwy 401.
- **Tourist Evaluation:** There is no formal program in place to track customer satisfaction in Quinte West and Belleville.
- **Quinte West Marina:** There is a proposed plan for a multi-million dollar marina project. The development will include a 380 slip (56 transient, 324 seasonal) marina located in close proximity to the new Quinte West city hall. This project could have a "significant" impact on the downtown core. In 2009, there were 1,412 seasonal boat slips within 50 kilometres of the proposed marina site in Quinte West. Last year, 1,910 boats required a slip, a shortfall of 570. By 2015, the regional demand will grow to 710 new slips and reach 1,000 by 2020.
- **The Quinte Racetrack and OLG Slots:** Proposal from Baymount and Plaza Gaming and Entertainment Corp. multi-million dollar project located on a 55 acre parcel of land in the north end of Belleville. Facility would include: 200-machine slots parlour, a half-mile racetrack, a 35,000-square-foot clubhouse and gaming facility and expandable 60,000 square-foot paddock and exhibition building to host the Belleville Agricultural Society.
- **New Train Station:** VIA Rail Canada's Senior Director, National Sales, announced VIA's plans for a new station with improved and expanded facilities. VIA estimates that it will invest as much as \$7 million for the new station, expected to open in 2011. The old train station will be restored as a historic site.
- **Murray Canal / Trent-Severn Way:** There are opportunities to capitalize on a one-of-a-kind boating trip through the historic, circa 1882 limestone-lined **Murray Canal** or a once-in-a-lifetime journey on the 386-kilometre **Trent-Severn Waterway**, through the spectacular series of locks, canals and lakes that begin in Quinte West and stretch north to Georgian Bay.
- **Sport Tourism:** Opportunities exist to promote and capitalize on tourism generated through sporting events and tournaments held by various organizations. The Bay of Quinte walleye season extends through the ice fishing season to February, and the larger watershed of Quinte West includes a wondrous web of rivers and streams. Fish for large and small mouth bass, northern pike, muskellunge, yellow perch, crappie and brown and rainbow trout.

The City of Belleville is currently in the process of building a \$35,000,000 multi-sports complex which will place the community in a position to attract a portion of the sport tourism market. The facility will include 2 NHL sized ice pads, 8 lane, 25 meter pool, public atrium, public info/ tourist space, fitness centre / gym/ indoor walking track, retail space, CFL and FIFA regulation sized soccer, football and multi-sport artificial sports field.

- **Outfitters:** Tourists visiting the area are not able to take advantage of the bay because of limited boat/kayak/canoe rental opportunities. Outfitters need to be in close proximity to the water.
- **Heritage Tours/Routes:** Belleville and Quinte West hold some fascinating history and are privileged to have many historically important buildings and sites. The Old Portage Road, running between the western tip of the Bay of Quinte and Presqu'ile Bay (paralleling the Murray Canal) is the oldest road in Ontario. It was used for centuries as a canoe-carrying route between the Bay and Lake Ontario. In addition, the former town of Trenton (Quinte West) was once considered an important film production centre and hailed as "Hollywood North". In 1917, a studio was built in the town and a number of productions filmed there. A plaque, erected on Film Street, is all that remains of the studio.

- **Culinary Tourism:** Opportunities exist to partner with Prince Edward County and Hastings County to further advance tourism by highlighting locally grown or produced food, beverage items or culinary experiences.
- **Vacancy Issues:** The Quinte West downtown core has a number of vacancies that need to be addressed. It was also noted by the PRTD team that there may need to be a better mix of shopping opportunities. Many of the stores are occupied by discount merchandisers and professional offices. Council seems highly aware of this and is making strides to improve the situation through the development of a Commercial Recruitment Strategy and Action Plan.
- **Traffic Congestion on Bell Boulevard and Front St:** A new bridge across the Moira River connecting Adam St to Bell may improve the flow of traffic.
- **Bike Paths:** There are two routes from downtown Belleville to the mall on the north end of town. Front Street and Sidney Street have overpasses for the train tracks. Bikers have reported that these are high traffic routes and are not biker friendly.
- **Public Transportation:** Belleville and Quinte West both operate a public transit service. Laidlaw also offers transportation three times a day, from Monday to Friday, between the two cities.

K MANAGING WITHIN CARRYING CAPACITIES

This section measures and assesses the extent to which Belleville and Quinte West are aware of, and manage within its capacity thresholds specifically of its local economy, ecosystems and soft services infrastructure, its guest's satisfaction levels, hard services infrastructure, and its administrative systems. The evaluation documents Belleville and Quinte West's ability to manage the system that sustains it and its attractiveness to the tourism marketplace.

K-1: Destination visitation generates economic benefits to the host community.

Measure		Yes	Almost	No
i	Guest visits and expenditures make a net positive contribution to the local economy.	✓		
ii	Benefits and costs are balanced equitable across municipal boundaries.			✓

Tourism brought an estimated \$206,991,000 in economic benefits to Hastings County in 2007 according to Travel Survey Residents of Canada (TSRC) and the International Travel Survey (ITS). This included \$92,343,000 in direct, indirect and induced contributions to GDP, \$80,026,000 in labour income and salaries and \$5,169,000 in municipal taxes. A total of 2,339 direct and indirect jobs were created in the tourist industry. Guests' visits and expenditures definitely make a net positive contribution to the local economy.

Table 3.1: The Economic Impact of Visitors Spending in the region

		Impacts retained in CD 12	Impacts that accrue to other parts of Ontario	Total impacts of CD 12's visitor spending in Ontario
		[A]	[B]	[A+B]
GDP (Gross Domestic Product) (\$ 000s)	Direct	92,343	6,669	99,012
	Indirect	19,101	13,105	32,206
	Induced	21,727	11,377	33,104
	Total	133,169	31,154	164,323
Wages and Salaries (\$ 000s)	Direct	53,626	4,302	57,928
	Indirect	12,936	8,677	21,613
	Induced	13,466	7,271	20,737
	Total	80,026	20,253	100,279
Number of Jobs	Direct	1,791	100	1,891
	Indirect	275	175	450
	Induced	272	147	419
	Total	2,339	421	2,760
Taxes (\$ 000s)	Direct	54,141	2,825	56,966
	Indirect	12,209	5,572	17,781
	Induced	9,863	4,903	14,766
	Total	76,214	13,299	89,513
	Federal	39,425	6,830	46,255
	Provincial	31,620	5,113	36,733
	Local	5,169	1,356	6,525

(TSRC) Travel Survey of Residents of Canada (TSRC/ITS 2007)

It cannot be said that benefits and costs are balanced equitably across municipal boundaries.

Although both cities are promoted equally through the Bay of Quinte Tourist Council and do independent marketing through their economic development offices, location and opportunities contribute the imbalance of economic benefits.

The majority of Belleville’s commercial development is concentrated along the 401 corridor and is clearly visible to passing motorists. It is more likely they would stop to refuel, eat or visit the Quinte Mall in Belleville than pull off the highway in Quinte West and search out the commercial section.

That being said, the Tourist Information Centres in Quinte West are far more plentiful and easier to access than in Belleville, which could be beneficial to tourists looking for more information about the area.

Being the region’s largest centre, Belleville also offers more opportunities in terms of recreation, entertainment, dining and accommodations. Tourists can enjoy the urban conveniences of the northern part of the city or venture into “The Village” and enjoy a quaint stroll through the downtown, take in a show at the Empire Theatre, or enjoy a glass of regionally-made wine at Caper’s Restaurant.

In 2008, Quinte West underwent a branding project to set the city apart from other competing destinations in the area, including Belleville, Kingston and Prince Edward County. Their marketing plan identified the fact the area’s assets were “overshadowed” by its neighbours and that it was currently considered more of a “stop” than a destination.

Quinte West is addressing this through an aggressive ad campaign using the theme - “Quinte West: A Natural Attraction”.

K-2: Visitations does not consume local resources or increase their values to an extent that the local population is negatively affected.

Measure		Yes	Almost	No
i	Attractiveness of the destination to recreational or retirement home or investment markets has not bid up the cost of housing to the extent that it is unaffordable to the locally employed population.	✓		
ii	Where housing cost impacts are occurring, a plan to resolve the problem is being implemented.			✓
iii	Servicing guest visitation, or the investment to attract and accommodate it, does not consume labour or materials to the extent that their cost or availability to other sectors is impairing those sectors’ profitability.	✓		
iv	Where resource cost or availability impacts are occurring, a plan to resolve the problem is being implemented.			✓

The attractiveness of the region to recreational, retirement and investment markets has not significantly bid up housing costs to the extent that it is unaffordable to the locally employed population.

Housing prices in the area have followed a larger, national trend in increased costs. In 2009, the average house price in Quinte West and Belleville were \$203,000, well below the provincial average of \$311,098. According to the Canadian Real Estate Association, prices will continue to climb throughout Canada by 5.4 percent over the next year and ease by 1.5 percent in 2011.

Recreational properties or retirement homes are affordable when compared to other areas, and are not bidding up the cost of housing to the locally employed population.

Servicing guest visitation, or the investment to attract and accommodate it, does not consume labour or materials to the extent that their cost or availability to other sectors is impairing those sectors' profitability.

K-3: Trained labour is available to serve visitation demands at a level that maintains guest satisfaction.

Measure		Yes	Almost	No
i	There is a labour pool sufficient to accommodate current and projected levels of visitation.	✓		
ii	Where labour pool constraints are occurring, a plan to resolve the problem is being implemented.		✓	
iii	Guest surveys confirm satisfaction with hospitality and service.			✓
iv	Where dissatisfaction has been identified, a plan to resolve the problem is being implemented.			✓

Survey results from the Resource Audit indicate that 80% of the businesses feel that there is a sufficient pool of labour to support their staffing requirements to accommodate current and projected levels of visitation.

“The City of Belleville functions as the regional centre for the Quinte area and beyond; more than 200,000 people live within 40 kilometres (25 miles) of the City. Using an average participation rate of 60%, the area's labour force available to Belleville employers would easily exceed 120,000 persons.

This large labour pool provides a broad range of skills to local employers and has enabled the City to develop a diverse industrial base. Local plant managers are always quick to comment that the highly skilled and dedicated labour force has been a critical factor in the success of their businesses.” (*City of Belleville Website*)

Highlights of Quinte West's labour force include:

- Over 100,000 people within a 45-minute commute
- Competitive wage rates
- A large French-speaking or bilingual population
- Strong work ethic which results in low turnover and absenteeism rates

A recent study released by the Canadian Tourism Human Resource Council (CTHRC) shows that “in the years ahead, the challenge of finding enough people to fill tourism jobs will intensify – so much so that missed opportunities and the inability to meet potential business could cost the industry billions of dollars. By 2025, the potential labour shortage could reach 384,000 full-year jobs. This shortage represents the cumulative effect of missed opportunities and unfulfilled demand from 2005 to 2025.”

Local barriers to the tourism labour pool include: high turn-over in the hospitality sector due to the lower pay and seasonal nature of the work, greater percentage of population reaching retirement age, limited transportation between Belleville and Quinte West and a growing industrial sector with higher paying jobs.

As no county-wide guest surveys or customer satisfaction surveys are currently performed, it is not possible to confirm the level of visitors' satisfaction with hospitality and service received while visiting the destination. Although the survey indicated that individual respondents do currently conduct surveys of some kind, they are typically for their own internal use.

K-4: Carrying capacities of the natural systems that sustain local ecosystems and quality of life are not overwhelmed by destination visitation.

	Measure	Yes	Almost	No
i	There is an environmental monitoring program in place which provides early warning that the quality of the resource or the visitor experience is at risk of being impaired.	✓		
ii	There is a community health and well being monitoring program in place that provides early warning of whether quality of life impact thresholds are being approached.	✓		
iii	Evidence from formal monitoring programs, or informal observations indicates that no capacity/thresholds are being exceeded.	✓		
iv	Where the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented.	✓		

There are a number of organizations that have environmental monitoring programs and community health and well being monitoring programs in place to provide early warning and to ensure that the quality of the resource (i.e. air, drinking water etc.), or the visitor experience (beach water testing, mosquito/west nile monitoring etc.) is not at risk of being impaired or impacted.

- Hastings & Prince Edward County Health Unit
- Ontario Ministry of the Environment
- Ontario Clean Water Association
- Ontario Ministry of Natural Resources
- Ontario Ministry of Northern Development, Mines & Forestry
- Ontario's Biodiversity Strategy
- Ontario Federation of Anglers & Hunters Invading Species Awareness Program
- Bay of Quinte Remedial Action Plan
- Trent Conservation Coalition on Safe Drinking Water
- Ministry of Agriculture
- Environment Canada
- Canadian Food Inspection Agency
- Quinte Conservation Authority
- Lower Trent Conservation Authority

Evidence from formal monitoring programs or informal observations indicates that currently no capacity/thresholds of community health are being exceeded. Occasionally there may be isolated situations/occurrences identified from monitoring programs, however, there has not been any long term or recurring problems.

Where issues concerning damage to the environment or quality of life are at risk or are being impaired, a plan to resolve the problem is being implemented. For instance:

The Bay of Quinte Remedial Action Plan involves active research in areas of ecology, inland water studies, habitat, fisheries, invasive species, contaminants, climate impacts, watershed interactions, water quality and quantity will become part of the solutions for the future.

Quinte Conservation Authority and The Lower Trent Conservation area work closely with local municipalities. There are many species at risk within Belleville / Quinte West including various trees, plants, insects, birds and butterflies that are being monitored closely through a number of Conservation Programs. The Frink Outdoor Education Centre offers year round education programs geared toward conservation.

K- 5: Growth in visitation to the destination is not threatening the experience enjoyed by current visitors.

Measures		Yes	Almost	No
i	Overcrowding, overuse, diminished quality of the environment or diminished quality of the guest experience is not being raised as issues by guest surveys or by managers of facilities and resources.	✓		
ii	If issues are raised, they relate to one or two peak weekends only.		✓	
iii	A response to identified issues has been defined and is being implemented.			✓

Overcrowding, overuse, diminished quality of the environment or diminished qualities of the guest experience are not being raised as issues by guest surveys or by managers of facilities and resources. If issues are raised, they relate to one or two peak weekends only.

Area	Issue	Period
Downtown Trenton (Quinte West)	Traffic congestion	First weekend of May during Walleye World Fishing Tournament
North Front Street, Belleville	Traffic congestion at intersection near Bell Boulevard	Year round
Zwick's Park, Belleville	Parking Issues	Summer – During Waterfront and Ethnic Festival

There has not been a significant number of issues raised relating to overcrowding or the diminished quality of experience by tourists, caused by visitor volume. Of the few issues that have been identified, there appears to be plans in place to address the problem. Take for instance:

- To improve traffic flow in the north end of the city, Belleville Boulevard will be extended and another bridge built over the Moira River.
- To address parking issues during the Belleville Waterfront and Ethnic Festival, the event's committee has arranged for shuttle bus service throughout the weekend.

K-6: Infrastructure is available to accommodate current or projected levels of demand without exceeding carrying capacities.

Measure	Yes	Almost	No	
i	There is current/planned water treatment and delivery capacity to accommodate current and projected levels of visitation.	✓		
ii	There is current/planned sewage treatment and trunk capacity to accommodate current and projected levels of visitation.	✓		
ii	There is current/planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation.	✓		
iv	Assessments of the environmental effects of infrastructure expansions have been completed, with effects considered manageable and acceptable.	✓		

Belleville and Quinte West follow the policies set out by The Ministry of the Environment regarding air, water and waste. There is current /planned water treatment and delivery capacity and sewage treatment and trunk capacity to accommodate current and projected levels of visitation.

“This Plan encourages an ongoing program of reconstruction and rehabilitation of the municipal water and sanitary sewer systems, including the separation of sanitary and storm sewers...As it is important that water and sewage treatment capacity exists to meet the needs of growth within the urban service area, the Municipality should prepare an annual update on the residual capacity in the water and sewage systems in accordance with Ministry of Environment guidelines as a planning tool to manage growth and undertake effective capital planning.”

Source: City of Belleville Official Plan

Over the next 11 years, the City of Quinte West will invest \$38.8 million on upgrades to its water systems in Trenton, Batawa and Frankford. Plans include the demolition of the water treatment plant in Batawa and the extension of a major water main to the village from Frankford.

A further \$7 million will be spent on a new bio solids storage facility in Trenton, while \$25 million will be used for the construction of a new sewage treatment plant or upgrades to the existing one.

Roads, Transit and Trails

There is current/planned road, transit, parking and trail capacity to accommodate current and projected levels of visitation. The primary routes through the Quinte area are Highways 401 and 2. With the exception of weekday commuter traffic and weekend tourist traffic, congestion is not a huge concern for residents of the area.

Highway 2: runs east and west through Belleville and Quinte West and serves as an alternative route in case of blockage on the 401. **Moira River Bridge:** A budget of \$3,746,124 has been allocated for the construction of a new Moira River bridge from Cannifton Road/Adam Street to an extension of Bell Boulevard in Belleville. The bridge will connect the commercial part of the city with the nearby industrial section and help improve traffic flow.

Trent River Bridge: Work is underway to rehabilitate the Trent River Bridge along Hwy 401 (Quinte West). A total of \$39,058,039 will be spent on the project which includes widening the structure to accommodate future highway. The project is expected to be completed in September 2011.

Dundas St. Bridge: The City of Belleville has approved a \$1.6 million project to rehabilitate the bridge on Dundas St West of the CPR tracks.

Sidney St. Bridge: Work is now underway to rehabilitate the Sidney St. CNR overpass (Belleville). The project will include removal and replacement of the asphalt, architectural finish on the parapet walls of the structure to improve its visual appearance and improvements to the Moira Street West and Sidney Street intersection to deal with “serious rutting problems.”

Belleville Roads: Upgrades/reconstruction has been planned for the following Belleville roads – South Pinnacle, South Church, South John, South George, McFarland Drive, Centre Street, Harder Drive, and West Street.

Smithfield Bridge: With the assistance of federal and provincial grants, the City of Quinte West has constructed a new overhead bridge on Hwy 2 near Smithfield. The bridge replaced an existing 67-year-old structure and cost the city approximately \$8 million.

Hwy. 33 – A major road reconstruction project is underway on Highway 33, between Trenton and Frankford. The highway between Powell Street in Frankford and Parry Drive just north of Batawa will be realigned. In addition, a four kilometre section of highway between the Sonoco plant and Sidney Crescent will be resurfaced. By eliminating the long “s” bend just south of Frankford and creating straight section of highway, the safety of motorists will improve significantly. Straightening of the road will also allow for the addition of a parkette along the Trent River.

Quinte West: The total 2009 Operations Budget for Public Works was \$19 million and the 2009 Capital Budget was \$20 million for a total Operating and Capital Budget of \$39 million. The city’s Public Works department is responsible for 1600 lane kilometres of roadways, 120,000 square metres of sidewalks, 50 bridges, waterfront trails, treatment of approximately 6000 mega litres of wastewater/sewage, supply of approximately 7000 mega litres of potable water per year and the operation of 4 water treatment plants, 3 wastewater treatment plants and 13 sanitary pumping stations, to name a few.

Belleville: The total 2010 Operations Budget for Belleville is approximately \$29 million and the 2010 Capital Budget for engineering type projects is \$23 million for a total Budget of \$52 million. The City maintains 859 lane kilometres of roadways, 200 kilometres of sidewalks, 71 bridges that includes large span culverts and structures in parks as well as 24 kilometres of recreational and waterfront trails. On an annual basis 13,280 mega litres of wastewater/sewage is treated and approximately 7,903 mega litres of potable water is supplied. 2 water treatment plants, 4 reservoirs, 1 sewage treatment plant and 14 sanitary pumping stations are major components of Belleville’s infrastructure.”

Bleasdell Boulder Site: Quinte West has budgeted \$16,200 for trail improvements at the Bleasdell Boulder site. Work will include a new access trail between the rock and Lower Trent Trail.

Transit Services: The public transit system for Belleville and Quinte West consists of VIA Rail, coach bus services, local bus services and private taxi companies.

K-7: Municipal entities with approval authority are able to address development applications in a timely manner.

Measure		Yes	Almost	No
i	Local and upper tier (where present) Official Plans have tourism related objectives and policies in place.	✓		
ii	There is a political will to move forward with those projects considered to further the objectives expressed in the Official Plan or other planning documents.	✓		
ii	There are sufficient administrative resources in place to efficiently manage review, approvals and permit processes.	✓		

Local tier Official Plans have tourism related objectives and policies in place. There is political will to move forward with those projects considered to further the objectives in Official Plans and other strategic planning documents.

“The Quinte region has many qualities that support a strong tourist industry and the city is in a position to benefit from this opportunity.

This Plan encouraged development of uses that attract and provide services to tourists (i.e. restaurants, hotels and motels, theatres, trails and beaches, parks, golf courses, recreation complexes). The land use policies for the downtown, bayshore, planning area, commercial districts, open space and recreation commercial areas provide for the development of many uses that achieve those objectives.”

(Source: Belleville Official Plan)

“This Plan recognizes the importance of the sports fishery to the region’s tourist industry, and encourages the maintenance and enhancement of the fishery. Public access to the Bay of Quinte and Moira River should be provided as appropriate.

(Source: Belleville Official Plan)

“There will be a strong tourist demand in the future for the natural, historical and cultural attractions of the City and region. The protection and enhancement of the area’s significant natural, historical and cultural attractions will be the focus of the region’s successful tourism strategy. The Bay of Quinte and Moira River will play important roles in this regard. Tourist support services will be expanded to complement and enhance the attractions of the City.”

(Source: Belleville Official Plan)

“It is the intent of this Plan that the concept of recreational trails connecting various parts of the City be considered as an integral part of the City’s transportation system. Recreation trail systems are a unique community resource providing opportunities for public waterfront access, outdoor leisure and recreational activities, interpretation of the natural environment and historic context of the community and diversity of tourism activities...”

(Source: Belleville Official Plan)

“This Plan encourages the establishment of a high quality recreational camping and RV Park site within the immediate Belleville area. Certain lands designated Open Space may have potential for and be appropriate for this use.” *(Source: Belleville Official Plan)*

Quinte West has also shown a strong desire to move forward with tourism initiatives based on their Official Plan.

“The new Official Plan for the City of Quinte West will serve to help the City achieve the stated priority objectives through the implementation of long range planning and development policies that:

- Facilitate the promotion of economic development opportunities through a balance of agricultural, tourism, commercial and industrial land uses in areas designated and determined to be best suited to each economic sector;
- Protect the natural, historical and cultural attractions of the City for the promotion of tourism on a local, regional, national and international basis.” *(Source: Quinte West Official Plan)*

Based on discussions with several municipal planning departments/representatives, there does not appear to be significant shortcomings in administrative resources. The Planning & Development Department in Quinte West operates with a staff of 15 people, while Belleville’s Engineering and Development Services employs 34 people.

Belleville and Quinte West Premier-ranked Tourist Destination Project <i>Summary of Findings/Observations and Recommendations</i>	
Findings & Observations	Recommendations (Note: In no particular order of priority)
No particular organization leading the way in terms of destination development	Identify an Organization to Lead Destination Development <ul style="list-style-type: none"> • Currently several are involved in tourism but no one organization is leading • Consider empowering the Bay of Quinte Tourist Council to assume this leadership role • Both cities remain at the table and entrust the industry led council to drive destination development and marketing • Cities fund aspects of the council operations • Chambers service visitors
No clear understanding of tourism and its importance amongst industry	Take steps to fully engage the tourism industry in destination development <ul style="list-style-type: none"> • A core group of operators are interested however there is limited broad-based understanding and engagement • Use the results of the PRTD process to “rally the industry” • The Council in partnership with the Cities must take a lead role in educating the industry in the upside opportunities
No Destination Development Action Plan in place	Prepare a Belleville/Quinte West Tourism Destination Development Action Plan <ul style="list-style-type: none"> • This becomes the road map for future destination development • Prioritizes PRTD recommendations and paints a clear picture for implementation • Once plan is developed fund a locally based facilitator (FT/PT) whose focus is solely on destination development • Tap into new RTO for development dollars

No formal customer service training in place for Belleville and Quinte West	<p>Deliver industry-wide tourism training for owner operators, front line staff</p> <ul style="list-style-type: none"> • Service and Hospitality Training • Tourism Market Readiness • Tourism Packaging Workshops • New Media/Internet • Tourism Experience Development Workshops • Utilize the services of the Ministry of Tourism to deliver training • Engage Chambers to facilitate training
Tourism assets that offer potential DO exist	<p>Build future tourism growth around these attractors – National Air Force Museum of Canada, Empire Theatre & Centre for Performing Arts</p> <ul style="list-style-type: none"> • These are the primary reasons to visit • They offer incremental tourism potential • They are year-round tourism experiences • There is a market for these experiences • Each presents opportunities for packaging
Projects in the works to pave way for long-term destination development	<p>Focus long-term tourism destination development on the Belleville Multiplex (sports tourism), Quinte West Marina, Quinte Exhibition and Raceway expansion</p> <ul style="list-style-type: none"> • Each represents a significant opportunity to drive future tourism growth – two are year-round tourism opportunities • Each facilitates natural tourism spin-offs – accommodations, retail, F&B • Each is a “must do” tourism initiative
No formal marketing plan in place for Belleville/Quinte West	<p>Develop an Annual Marketing Plan</p> <ul style="list-style-type: none"> • Build on past and current marketing activities • Internet and new media should be the logical choice for all promotional initiatives • Call to action is new Bay of Quinte Tourist Council web site: www.bayofquintecountry.com • Create packaged experiences for core attractors that can be purchased on-line • Develop plans in partnership with Prince Edward County and others in Region 9

APPENDIX A

Transportation Resources Checklist

Yes No

Attribute

1.	a.	The destination has at least one easily accessed Visitor Information Centre,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	b.	on a major transportation route.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	c.	with clear and frequent directional signage	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2.	a.	Major tourist transportation routes to downtown(s) have frequent directional signage,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	b.	well-maintained road surfaces,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	c.	and attractively maintained public spaces.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.	a.	Transportation routes to major attractions have frequent directional signage,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	b.	well-maintained road surfaces,	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	c.	and attractively maintained public spaces.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4.		Shuttle services or taxis and Tourist orientation information are available at transportation terminals	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5.		Tourist traffic congestion and way-finding problems are addressed by transit-based interventions, e.g., municipal transit, shuttle services, People Movers, satellite parking.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6.		Transit services to core attractions have schedules that accord with attractions' hours of operation.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7.	a.	Taxi drivers have been given service delivery training,	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	b.	and briefing on tourist attraction locations.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8.		All attractions serving the coach tour market have sufficient on-site bus parking, Or there is convenient access to a bus parking/staging area.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

APPENDIX B

Travel Trade Resources Checklist

Attribute

Yes No

1.	A complete inventory of receptive tour operators bringing coach or FIT travel to the destination.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2.	Receptive tour operators have been contacted to identify:		
a.	The attractions, accommodations and other facilities visited, and visitation volumes;	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b.	issues e.g., parking, that impair visitation or the visitor experience;	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c.	opportunities to improve the visitor experience and increase visitation; and	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d.	other assets that, with additional investment, could attract group tour visitation.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.	A local receptive tour operator sits on a Workbook implementation committee.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4.	A complete [smaller areas] or comprehensive cross sectional [larger centres] inventory of local travel agents serving clientele resident in the destination area has been compiled.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5.	Travel agents have been contacted to determine:		
a.	Their perceptions of opportunities to package travel experiences within the destination area;	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b.	their interest in packaging travel experiences within the destination area;	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c.	their perceptions of opportunities to improve the visitor experience and increase visitation to the area.	<input checked="" type="checkbox"/>	<input type="checkbox"/>